

CAB2988(HSG)  
CABINET (HOUSING) COMMITTEE

REPORT TITLE: SHELTERED HOUSING – TENANT SCRUTINY REVIEW

22 NOVEMBER 2017

REPORT OF PORTFOLIO HOLDER: LEADER WITH PORTFOLIO FOR HOUSING SERVICES

Contact Officer: Amber Russell Tel No: 01962 848229 Email  
arussell@winchester.gov.uk

WARD(S): ALL

PURPOSE

This report details the findings of a tenant led scrutiny exercise of the Council's Sheltered Housing Service. The scrutiny exercise was recommended in response to concerns from some sheltered housing tenants who were unhappy with the service received from the Sheltered Housing Team. Following the scrutiny exercise a number of recommendations were made by the scrutiny group and this reports sets out those points together with a response from Council officers.

RECOMMENDATIONS:

1. That the recommendations and responses in this report regarding the scrutiny exercise are noted and the actions be approved.
2. That proposals to install a community Wi-Fi network to all sheltered housing schemes be approved.
3. That, for the procurement of a community Wi-Fi network to all sheltered schemes, the Councils Contracts Procedure Rules be waived, and delegated authority be given to the Corporate Head of Housing in consultation with the Portfolio Holder for Housing Services and the Legal Services Manager to select and subscribe to (if deemed appropriate and necessary) an existing external Framework agreement to procure these works.

**IMPLICATIONS:****1      COUNCIL STRATEGY OUTCOME**

- 1.1 Delivering quality housing options is the third strategic outcome of the Council's Strategy. This report aims to ensure that tenants living in our sheltered housing schemes are satisfied with their accommodation and the services provided to them.

**2      FINANCIAL IMPLICATIONS**

- 2.1 The report includes proposals to extend community Wi-Fi provision at all sheltered schemes. Capital provision of £115,000 is already included in the HRA Capital Programme to fund this work. Ongoing revenue implications of approximately £15,000 will be met from tenant service charges. However, the costs will be offset by savings in excess of that amount achieved through the cancellation of all existing broadband connections and a number of obsolete phone connections which are no longer required and so no increase in service charges is projected as a result of this work.

**3      LEGAL AND PROCUREMENT IMPLICATIONS**

- 3.1 With regard to the procurement of community Wi-Fi solutions, a number of EU compliant frameworks have tested this market and delegated authority is being sought to determine the most appropriate form of procurement, which will comply with the Council's Contracts Procedure Rules and the Public Contracts Regulations 2015.

**4      WORKFORCE IMPLICATIONS**

- 4.1 No direct workforce implications arise from the recommendations included in the report. Some organisational changes have already been implemented which take account of the recommendations put forward by the scrutiny process. This has included changes to rotas and time officers spend at each scheme.

**5      PROPERTY AND ASSET IMPLICATIONS**

- 5.1 None

**6      CONSULTATION AND COMMUNICATION**

- 6.1 The scrutiny exercise was undertaken by tenants who visited all 12 of the Council's Sheltered Housing Schemes. During the visits they spoke to tenants living at the schemes about their views of the Sheltered Housing Service and asked them to complete a short questionnaire. The scrutiny group plan to revisit the schemes to feedback on their report following Cabinet (Housing) Committee. Officers from the Sheltered Housing Team were also consulted as part of the scrutiny exercise.

7      **ENVIRONMENTAL CONSIDERATIONS**

7.1    None

8      **EQUALITY IMPACT ASSESSMENT**

8.1    The changes implemented to sheltered housing services in 2015 were subject to a detailed equality impact assessment at that time.

9      **RISK MANAGEMENT**

<b>Risk</b>	<b>Mitigation</b>	<b>Opportunities</b>
<i>Property – None</i>		
<i>Community Support – Residents ongoing concerns regarding service levels</i>	Proposed consultation and briefing to all schemes regarding overall service, branding and staff representation.	
<i>Timescales – None</i>		
<i>Project capacity - None</i>		
<i>Financial / VfM – Demonstrating VFM for community Wi-Fi solution</i>	EU compliant procurement process to be identified. Existing poorly used connections to be deleted	
<i>Legal – EU compliant procurement of community Wi-Fi solution</i>	As above	
<i>Innovation – None</i>		
<i>Reputation – Perceived poor customer satisfaction identified by scrutiny process</i>	Results of STAR survey (sent to all sheltered residents and which achieved a 54% return rate) demonstrated a 92% satisfaction rate overall	Proposed scheme visits will provide the opportunity to further address any ongoing resident concerns.
<i>Other</i>		

10     **SUPPORTING INFORMATION:**

**Background**

10.1    The Housing Service has always assisted tenants to undertake reviews of its services as part of its commitment to Tenant Involvement. In 2012, more formal Performance Review Groups (PRG) were established to monitor key performance areas and service delivery, including recommending scrutiny exercises where concerns have been highlighted. Scrutiny exercises are undertaken by interested members of the PRGs who act as a task and finish

group, their work culminating with the production of a report highlighting their findings and recommendations.

- 10.2 The Older Persons PRG requested that a scrutiny exercise be undertaken after hearing concerns from sheltered housing tenants about changes to the Sheltered Housing service and a general feeling of discontent about the service being provided. A scrutiny group was formed and supported by the Tenant Involvement Team - they undertook a review of the Sheltered Housing service over a period of 4 months. The review included speaking to managers and front line officers involved in the delivery of the Sheltered Housing service, integral partner organisations such as Adult Services and Chichester Care and tenants living at the Council's 12 sheltered housing schemes across the Winchester district.
- 10.3 At the end of the scrutiny group exercise, the group produced their final report detailing their progress and findings together with a number of clear recommendations. A copy of their report is attached in Appendix 3.
- 10.4 Following the production of the scrutiny group's report, officers were invited to provide a response to the matters raised. A copy of the response from officers is attached in Appendix 2.

### **Overview of Sheltered Housing Service**

- 10.5 Prior to April 2015, Hampshire County Council directly commissioned over £400,000 of older persons support services and this funded the City Council's in-house team to provide:
  - a) Support for older residents living in sheltered housing and in some de-designated schemes.
  - b) Responding Officers who provided a personal home response service to emergency calls 24 hours a day, 7 days a week.
  - c) An in-house Alarm Monitoring/Central Control Service which provided daily calls to older people.
- 10.6 In 2015, the County Council withdrew funding from all Hampshire providers of sheltered housing services and implemented a model of commissioning support only for residents that met an assessment threshold, which very few City Council tenants satisfied. As a result, the above "in house" services were de-commissioned and the City Council's sheltered housing offer was revised to include:
  - a) Properties well located for local services and adapted for older persons with additional communal facilities (guest rooms, common/meeting rooms, buggy stores, level access etc.) and an enhanced standard of grounds maintenance (compared to general needs housing)
  - b) Allocations restricted to over 60s

- c) 24 hour Alarm Monitoring (next of kin and/or emergency services immediately notified where necessary)
  - d) An “enhanced” housing management service, with regular on site staffing presence (health and safety and alarm checks, contractor monitoring etc.) and weekly meetings offered to all residents.
- 10.7 Appendix 1 provides further information about the Sheltered Housing schemes and the other types of older persons accommodation which are also available.
- 10.8 As part of agreeing service levels and implementing the changes, officers undertook a considerable consultation exercise in 2014/15 to inform sheltered tenants of the potential changes to their sheltered housing service and obtain their views. This included a presentation and discussion at the Sheltered Housing Forum; a personal letter to every sheltered tenant explaining the review process and a series of meetings at all sheltered schemes to explain the position and answer questions. In addition, every resident was met individually to complete a support assessment, to determine who may meet the revised Hampshire thresholds.
- 10.9 Tenants were also advised of the outcome of the review of the sheltered housing service again through a personal letter, meetings at all sheltered schemes and a further presentation at the Sheltered Housing Forum.
- 10.10 Despite this extensive communication with sheltered tenants, a number still do not accept the changes that have been made and have expressed dissatisfaction with the current service provision in comparison to what they received previously. This has resulted in the Older Persons PRG identifying the sheltered service for a tenant scrutiny review.
- 10.11 This dissatisfaction should be put in context with the wider view of sheltered housing tenants generally. The Tenant Satisfaction Survey which took place in March and April of this year, a similar time to the scrutiny exercise, recorded that 92% of sheltered residents were satisfied with the overall service from the City Council as a landlord (55% being very satisfied). 77% of those who responded were satisfied with the helpfulness of the sheltered housing team and 66% were also satisfied with the frequency of face to face contact with staff.

### **Recommendations, Responses and Actions**

- 10.12 The scrutiny group made eight main recommendations in their report (pages 22 and 23 of Appendix 3) which as requested have been responded to by officers (pages 1 and 2 of Appendix 2). Six of the recommendations have already been actioned or clarified, or are currently in the process of being investigated or addressed. However there are two which are outstanding and require further consideration:

- i. Change the name of the service – Many residents and the scrutiny group felt that ‘Sheltered’ no longer reflects the housing service and generates confusion regarding tenant expectations. Some landlords have moved away from this terminology and brand similar services as “retirement living”, “older persons housing” or “independent living”.
  - ii. Change the name of the weekly officer time at the schemes - The term ‘surgeries’ causes confusion and does not reflect the service offered
- 10.13 The scrutiny group and officers are in agreement that it would be helpful to review the term ‘Sheltered’ housing so that it is meaningful to tenants and reflects the current service provision. There is also a consensus that not all tenants understand the services provided by the Sheltered Housing team and that this should be addressed.
- 10.14 To address these concerns the proposal is for members of the scrutiny group and the Sheltered Housing team to visit all 12 schemes together to explain the current services, listen to any ongoing resident concerns and to invite residents to make suggestions for a more appropriate name for this accommodation and also the weekly sessions run by the team.
- 10.15 Following on from the scheme meetings, it is also proposed that the tenant scrutiny group and officers agree an ongoing communications strategy to ensure service levels are understood by all residents and that appropriate mechanisms are in place for residents to give their views and contribute to the effective operation of each scheme. This will include opportunities for face to face discussions, development of digital communication channels and published information relevant to each scheme which can given to all existing tenants and also form part of the welcome process for all new tenants to sheltered housing.
- 10.16 It is hoped that this joint approach of tenants and officers working together to improve the Sheltered Housing service will go some way to address the dissatisfaction felt by some tenants and also encourage understanding and communication between unhappy residents and Council officers.

### **Digital Services at Sheltered Housing Schemes**

- 10.17 As part of its work to improve the sheltered “offer”, to further differentiate the enhanced services over and above the general needs “offer” and in particular to address the risk of increased social isolation for older residents with mobility difficulties or no family nearby, the Council has installed broadband services in communal areas in some schemes, offering free access for residents where possible. CAB2893(HSG) dated 1 February 2017 approved £115,000 in the capital programme to fund the extension of these services to all schemes and to provide access throughout schemes (including resident’s flats) as well as in communal areas.
- 10.18 Installation costs can be met from the capital provision. Ongoing annual maintenance and broadband costs are projected at £15,000. Whilst this

would be charged to residents through service charges, the cost will be more than offset by the deletion of all existing individual broadband connections to schemes and a number of historic telephony connections which are no longer required. Therefore, tenants should not see an increase in service charges as a result of this enhanced level of service.

- 11 Suppliers of “community Wi-Fi” networks are limited although one organisation does provide such services to over 50 social landlords currently. With a very limited number of suppliers, it is questionable whether an open tender process is the best procurement approach in the circumstances. A number of EU compliant frameworks have tested this market and delegated authority is being sought to determine the most appropriate form of procurement, which will comply with the Council’s Contracts Procedure Rules and the Public Contracts Regulations 2015.

12 OTHER OPTIONS CONSIDERED AND REJECTED

- 12.1 None

BACKGROUND DOCUMENTS:-

Previous Committee Reports:-

CAB2574 Supporting People Funding for Older persons Services and Socially Excluded Services dated 26 March 2014.

CAB2613 Options for the Future Management of Sheltered Housing dated 01 October 2014.

CAB2657 Review of the Designation of Sheltered Housing dated 04 February 2015.

CAB2936 Tenant Satisfaction Survey Results dated 06 July 2017.

Other Background Documents:-

None

APPENDICES:

Appendix 1 - Classification of Older Persons Accommodation

Appendix 2 - Sheltered Services Scrutiny Report – Officer response to matters raised in the report

Appendix 3 - Sheltered Services Tenant Scrutiny Review – Final Report

## Classification of Older Persons Accommodation

WCCs Older Persons accommodation is grouped into the following categories. The services and associated charges delivered to tenants is dependant on the type of accommodation they occupy.

### Sheltered Schemes

The following are Full Sheltered Schemes and the tenants all pay a service charge of £10.82 per week for the Sheltered Housing Management Service and £1.01 for the Alarm Monitoring Service.

Eastacre

King Harold Court

Hyde Lodge

Hyde Gate

Greens Close

Makins Court

White Wings

Richard Moss House

Godson House

Lawn House

Mildmay Court

Normandy Court

These tenants **cannot opt out** of either the Alarm Service or the Sheltered Housing Management Service.

### Extra Care Schemes

The tenants all pay a service charge of £10.08 per week for the Sheltered Housing Management Service and £1.01 for the Alarm Monitoring Service.

Matilda Place

Danemark Court

These tenants **cannot opt out** of either the Alarm Service or the Sheltered Housing Management Service.

### **Bungalow Schemes - linked**

Bungalow Schemes are classified as older persons accommodation, rather than sheltered housing schemes. The tenants here do not pay the Full Sheltered Housing Management charge but they are required to pay the charges for the Alarm Service and an Estates Service charge. Tenants **cannot opt out** of the services provided at the Bungalow Schemes. The Sheltered Housing Team maintain the alarm connection and a 6 monthly visit to undertake pull cord checks together with a visual inspection of the area for Health and Safety reasons at these Bungalow Schemes.

Wonston Close

Airlie Corner (bungalows)

Drummond Close (bungalows)

Firmstone Road (bungalows)

Lisle Court (bungalows)

Meadow View

Northfields

Pine Road

Springvale

Stoney Lane

### **Over 60's schemes - linked**

We also have the following Over 60's Schemes:

Chester Court

Simmonds Court

Spring House Close

These schemes are restricted to tenants aged 60 and over. Similar to the Bungalow Schemes they are classified as older persons accommodation and do not pay the Full Sheltered Housing Management charge. Like the Bungalow Schemes they pay for the Alarm Service and the Estates Service and **cannot opt out** of these services. The Sheltered Housing Team will provide the same services as per the Bungalow Schemes listed above.

### **Bungalows – not linked**

The Council has approximately 635 bungalows located throughout the district which are restricted to persons aged 60 and over but do not have the fixed Alarm

Monitoring equipment or receive the Sheltered Housing Management Service. As with the general needs sites below, tenants living in this accommodation can opt to become a Lifeline customer.

### **General Needs Sites**

The following sites were previously Sheltered Housing Schemes but are now General Needs Sites:

Airlie Corner

Bartholemew Close

Chiltern Court

Colson Close

Drummond Close

Firmstone Road

Harwood Place

King Alfred Place

Lisle Court

Monks Road

Penton Place

The Valley

40A- 40D Water Lane

Tenants at these sites were given the option to opt out of the Alarm Service post April 2015 if they were previously paying for this service. Those tenants who chose to keep the Alarm Service are classified as Older Persons, similar to the Bungalow Schemes and the Older Persons Schemes. They too pay the charge for the Alarm Service and the Estates Service. The Sheltered Housing Team are responsible for providing the services related to the Alarm Service. The Estates Team undertake the Health & Safety checks at some of these sites but the Sheltered Team have responsibility for those where there are Older Persons Bungalows at these sites (see above).

Over time there will be no further 'Older Persons' living at these sites and then any tenant wishing to have assistance will need to become a Lifeline customer.

**Sheltered Services Scrutiny Report  
Officer Response to matters raised in the report –**

**Richard Botham, Assistant Director (Chief Housing Officer)**

**Response to Recommendations**

1. This recommendation has been actioned and staff will continue to rotate the schemes they attend on a quarterly basis. This has to be balanced with staff building effective relationships with residents and a good knowledge of schemes.
2. Housing teams are currently trialling mobile working devices which will include the Sheltered Housing Officers to determine what could assist officers in undertaking their roles.
3. This recommendation has been actioned and key safes form part of the 6 monthly check of the alarm equipment.
4. It is accepted that the term 'Sheltered' is out of date and does not reflect the accommodation or services provided. Officers would welcome working with the scrutiny group members/other tenants to agree a more meaningful classification.
5. How repairs are taken and dealt with by the Council is currently being reviewed by the Council as part of the corporate Vanguard project.
6. The name of the weekly sessions with Sheltered Housing Officers 'surgeries' can be changed. Suggestions have been put forward and comments are welcomed.
7. The Sheltered Housing Officers have a good working knowledge of support/care services and providers locally and this is discussed at team meetings so everyone is kept up to date of new services, changes to providers and so. Referrals are made by staff and/or information is provided to tenants currently. Relevant literature is also provided in the communal lounges and on request.
8. The group had sought clarity on how the £10.82 weekly charge for "sheltered management" was arrived at and challenged what was received for this charge.

It covers the cost of:

5 sheltered housing officers  
0.35 of the Sheltered team manager  
Support costs incurred by the above officers (IT, HR, Payroll, Insurance etc.)

Transport costs incurred by the above officers  
Total Cost = £221,117

This is then divided by 52 weeks and 393 sheltered residents = £10.82.

The charge covers the site specific work of the sheltered housing team (health and safety inspections, contractor monitoring and liaison, alarm checks, scheme surgeries, tenant liaison etc.)

A separate scrutiny process of management and service charges can be considered alongside other demands by the new Tenant Panel.

### **Response to other General Points**

#### Interviews with Sheltered Staff

Some of the comments are understandable, particularly from staff employed under the previous regime. However, I would challenge comments such as “it wasn’t what I signed up for”. The team were specifically recruited under new job descriptions and person specifications in April 2015. They were clearly different than previous ones and reflected the new arrangements. Some chose not to renew contracts but those that did know the terms and the expectations of the role.

The comments in the report appear to give operational staff views on working conditions, deployment of resources, etc. without the balance from senior managers on the policies and consistency of service they are aiming to deliver. Whilst operational staff are well placed to identify potential inefficiencies, they will also comment on things that more an “inconvenience” to them. Their comments will not always reflect some of the wider more strategic reasons behind service decisions.

#### Assisting Vulnerable Tenants

There is no reluctance from the Sheltered Housing Service to assist vulnerable tenants. Known vulnerable tenants are flagged on the Tunstall PNC system and Tenancy Sustainment Officers will assist any tenants who need help to manage their tenancy. Sheltered Housing Officers do visit vulnerable tenants when there are concerns and will refer to partner agencies for any ongoing care and support needs. Sheltered Housing Officers do encourage all tenants to attend the weekly activity sessions and do assist some tenants to attend by helping them to and from their properties to the sessions. The activity sessions are primarily held to reduce social isolation and the staff do their very best to make the events open and accessible for all. Although the current service no longer includes daily calls and visits from support officers/on site staff which it is accepted that some tenants do miss, many of these functions still continue in a different guise. Under the previous service tenants

also 'fell through the gaps', these often being the tenants who didn't want daily calls and engagement with the service.

### Weekly Visits to Schemes

Currently all schemes have a Sheltered Housing Officer on site one day per week. It is accepted that some schemes are busier than others due to the type and size of the building, the number of residents and the interest from residents to get involved in the activity sessions. This year a focus for the Sheltered Housing Team is to improve the quality and frequency of activities and increase the number of participants. The effectiveness of the sessions will be reviewed at an appropriate time and changes to time spent on schemes will be considered then.

### Change in Service

The current service began in April 2015 and was a direct response to fundamental changes in funding for support services. Prior to the changes taking effect, Steve Tong & Lynn Curtis led an intensive consultation programme with all sheltered tenants, visiting all schemes to discuss the changes in service and providing relevant information and updates. Tenants were also invited to the Sheltered Housing Forum in May 2015 where the new service was explained. The current services have also been explained at the weekly surgeries, sheltered housing newsletter and tenant handbook. We are happy to support the production of a leaflet which outlines the service if it is felt this will improve tenant understanding of the sheltered housing service.

Tenants and officers were disappointed by the changes that had to be made to sheltered support services as we could all see the benefits of what was previously delivered. However, unless tenants wish to pay for support services such as daily calls and/or on site staff, we are no longer able to provide them and this will need to be accepted.

### Sheltered Service Feedback Forms

It's my understanding that the Scrutiny Group visited all the 12 sheltered housing schemes as part of the scrutiny exercise and of the 420 tenants at the schemes nearly 20% completed the survey forms. This low response reflects some of the difficulties the Sheltered Housing Officers regularly experience when trying to engage with residents and encourage them to participate in activities at schemes.

We are obviously disappointed that 40 residents who completed the survey were clearly dissatisfied with the service they receive or had little understanding of what service was provided. However, I think it's important to view this alongside the results of the recent STAR survey which was also sent to all sheltered housing tenants at a very similar time to the Scrutiny Group and had a 54% response rate.

92% of sheltered residents said they were satisfied with the overall service from the City Council as a landlord (55% very satisfied). 77% of those who responded to the STAR survey were satisfied with the helpfulness of the sheltered housing team. Around two thirds were also satisfied with the frequency of the face to face contact (66%) and around a fifth (17% and 19%) respectively reporting dissatisfaction. I do feel all statistically information needs to be considered when reviewing this report and responding to the recommendations.

#### Chichester Care Line (CCL)

Reference is made in the report to CCL completing daily calls to the most vulnerable tenants and that this would be possible as only a small number of tenants would request this service. Certainly not all tenants would want this service however at this stage I don't think we could say with certainty what the need would be as we would need to define who was eligible and then make all sheltered tenants aware that this maybe available to them. This could be looked into further however no guarantee could be made to tenants that this would be provided for free.

#### Enhanced Repairs Service

There are a number of references in the report regarding sheltered housing tenants having an enhanced level of service for repairs and maintenance. The only difference between general needs and sheltered is the service for replacing light bulbs/lamps.

#### Buddy Service

Sheltered housing officers are promoting the buddy service and would like to include this as an activity session at each of the schemes and hope the scrutiny group members can assist with this.

#### Conclusions

I am grateful to the Scrutiny Group members for completing this exercise and for producing a report of their findings. The recommendations are on the whole what I expected and for those that haven't already been actioned or are in progress, I am happy to work with the group and officers to address these.

I do not believe there is a communication issue between sheltered tenants and Sheltered Housing Officers. The issue I feel is a continued feeling of disappointment for some residents regarding no longer having an on site warden, responding service or daily call from the alarm centre operative. As I have already mentioned in my report, staff also regret the loss of these functions but this situation is unlikely to change unless funding is available to provide these things and the associated resources they require.

Sheltered housing tenants do receive a good service, particularly when compared to what other housing providers now deliver. I agree that we need to promote this more and the leaflet may assist to get this message across to tenants. Examples of this include the duty system which enables tenants to contact the sheltered housing team direct during working hours rather than going through the customer service centre, the out of hours service where staff are on call outside of working hours to attend to emergencies in sheltered buildings, the weekly visits by the team and the range of activities that are provided, upgrading of the residents lounges and other communal areas within the schemes as well as the alarm monitoring service and the associated checks of equipment and updated tenant information that the officers complete.

It was disappointing to note that there was no reference to the positive aspects of the service in the report, neither the enthusiasm nor dedication of the sheltered housing officers and the positive feedback that many of those tenants who completed surveys gave. The report could have included these aspects to be more balanced and give a representative view of the service as a whole.

I am sorry that the group felt that they were not supported by officers apart from the Tenant Involvement Officer in this scrutiny exercise. Officers attended all meetings as requested by the scrutiny group and provided all information requested. Staff had been advised of the scrutiny exercise however the dates for when the group would be visiting schemes had not been made available to officers in order to advise staff accordingly. This was unfortunate but did not undermine the outcome of the exercise in any way.

Richard Botham, Assistant Director (Chief Housing Officer)

22 August 2017

# Sheltered Services Scrutiny Report

---

**Created by: Scrutiny Group Members & the Tenant Involvement Team**

10<sup>th</sup> July 2017

A Tenant led Scrutiny exercise into the effectiveness of the Sheltered Housing Service and where improvements could be made to increase tenant satisfaction. Recommendations therein.

# Contents

---

<a href="#"><u>Summary</u></a> .....	2
<a href="#"><u>Introduction</u></a> .....	3
<a href="#"><u>Report</u></a> .....	8
<a href="#"><u>Conclusions</u></a> .....	20
<a href="#"><u>Recommendations</u></a> .....	22
<a href="#"><u>Glossary</u></a> .....	24
<a href="#"><u>Appendices</u></a> .....	25
<a href="#"><u>Appendix 1: Sheltered Housing Officer Job Description</u></a> .....	25
<a href="#"><u>Appendix 2: Sheltered Scheme Classification</u></a> .....	31
<a href="#"><u>Appendix 4: Tenant Feedback Form Template &amp; Responses - available on request</u></a>	

## Summary

This report details the progress and findings from the tenant-led Sheltered Services Scrutiny review. The group was formed in response to comments from Sheltered tenants that they were not happy with the service they were receiving.

An in-depth investigation was then undertaken by tenants to establish if there were any areas that they could identify improvements. The group spoke to relevant Officers from Winchester City Council, Hampshire County Council and Chichester Careline. They gathered Sheltered tenants' feedback via one-to-one conversations and a postal survey.

After their investigations, the group put forward a number of recommendations for which they require a WCC Officer response. The main recommendation is that the Sheltered Housing Service change their name to better reflect the service provided. Other recommendations include:

- More regular rotation of Sheltered Housing Officers
- A dedicated repairs number for Sheltered tenants
- An effective mobile working solution to be implemented for SHOs as soon as practicable
- Better communication with tenants and more signposting to services that could assist tenants

On this final point, the group hope to create a specific tenant-to-tenant information leaflet for Sheltered tenants. They will provide some information about what the service includes and what tenants can expect, where their own and WCC's responsibilities lie and where they can obtain services that WCC are no longer able to provide.

## Introduction

This Scrutiny project was initiated after Tenant Involvement Officers, Denise Sturgess – Housing Projects & Performance Manager - and the members of the Older Persons Performance Review Group (OP PRG) visited Winchester City Council's Sheltered Schemes and picked up on various issues that tenants were raising. The group felt that, although a lot of the issues that arose were minor and came down to managing expectations, there were some wider issues that could be addressed to improve the Sheltered tenants' quality of life. There was also a consensus that the Sheltered Service was lacking direction and specific, structured aims.

The visits to the Sheltered Schemes by the OP PRG had been initiated to speak to tenants on an equal basis and obtain their views. Although this exercise was valuable in helping the group form a wider view of how the service is being received, the evidence was mainly anecdotal.

To form the Scrutiny Group, members of the OP PRG recruited two other members; one from each of the other Performance Review Groups (Repairs & Maintenance and Housing Management). There was no formal 'Lead Officer' although it was agreed that Heather Emery – Tenant Involvement Officer, would be the group's liaison with WCC and the group would call in relevant officers to each meeting to discuss issues raised. For this exercise, the group agreed to only focus on Sheltered Housing and the services surrounding this service.

It was decided that the scrutiny exercise would be known as the Sheltered Services Scrutiny Group (SSSG).

The group identified the following aims and objectives for this project:

- Examine the Sheltered Housing Officers use of time and efficiency to determine whether there could be any improvements made. If possible, the group would like to improve the Officers use of time to better achieve their goals and manage their duty of care to the tenants

- Provide a clear definition for tenants as to what is ‘Sheltered’ – which properties fall under this category and what services are offered
- To assist the Sheltered Team in ensuring that Sheltered tenants feel as safe and secure as possible in their properties
- Assist WCC in managing this ‘change over’ period; where tenants who know ‘how it used to be’ become more satisfied with the new level of service. This will include assisting WCC in managing the expectations of tenants in Sheltered properties
- The group would like to try and improve engagement with the WCC services, improve the cohesion of schemes and to reduce the ‘them and us’ mentality between the Council Officers and tenants to ensure best and equal use of the common rooms
- Improve communication channels between staff and tenants. Ensure that the link is strong between the tenants and their Housing Officer and that they have a better idea of who they can talk to about what and what the Council’s responsibilities are
- To improve/expand the Buddy Scheme to more sites

They also identified the following questions that they would like to answer or investigations they would like to undertake to achieve the above:

- The group would like to speak to the four Sheltered Housing Officers on a one-to-one basis to get their point of view and how they feel about their role
- The group would like to see a copy of the Sheltered Officers job description – this will assist them in understanding the limitations and boundaries of the role. They would also like to understand why the staff are not allowed to visit any tenants and how the term ‘support’ is used
- Linked to the above, the group would like some background on what Hampshire County Council were funding before the changes

- The group will examine whether the term ‘Sheltered’ is fit for purpose. What duty of care the Officers and WCC have to the Sheltered tenants
- Examine the lack of consistency when it comes to defining Sheltered services and properties – what is general needs/over 60’s etc.
- To examine what the best ways of tackling social isolation are and whether the weekly scheme visits achieve this goal – are these the best use of time and could they be condensed (as per aim above)
- To look into whether having a daily call would be possible – even if paid for privately by tenants who wanted this level of reassurance
- To look into the data and safety policies of the Sheltered Team, including the pull cord system checks, fire regulations and keeping data up to date and relevant
- Investigate and clarify details on the Sheltered charge from each tenant and what that covers – the group will then be able to examine whether tenants are getting value for money
- How are vulnerable tenants ‘flagged’ on the system and highlighted – do they receive a different level of service and if so, how?
- The group will look into the following communication issues – what policies/processes could be put in place to assist non English speaking tenants in cases of emergency; to examine the signage used in common rooms and decide whether these are fit for purpose or excessive
- To look into the safeguarding for the most vulnerable tenants; what process is in place and what is the referral procedure

It was also agreed that the group would work with Denise Sturgess to carry out a Mystery Shop of the Sheltered Service.

To ensure that the scrutiny exercise is kept to a short timescale and remains on track, the group designed a timetable of meetings and demonstrated how each meeting would meet their aims. This process has worked well for previous scrutiny exercises and is a helpful tool for ensuring the group is effective.

Date	Meeting Topic	Officers Invited
1) 25 <sup>th</sup> January - 2pm  <b>Hyde Lodge Common Room</b>	Sheltered Officers use of time  Job shadow feedback  Job description	S. Turpitt  C. Scott
2) 6 <sup>th</sup> February - 2pm  <b>The Boardroom, West Wing, City Offices</b>	What is 'sheltered'? Discuss whether the name is fit for purpose and create a clear definition  Look at current scheme designations and roles/responsibilities at each	A. Russell  S. Turpitt
3) 20 <sup>th</sup> February – 2pm  <b>The Boardroom, West Wing, City Offices</b>	Discuss how tenants can be helped to feel safe and secure in properties.  Discuss Officer responsibilities, in particular relating to duty of care obligations. Investigate the possibility of a daily call option from CCL which	Chichester Careline  Adult Services  <b>C. Scott should also attend and is available</b>  <b>S. Turpitt is contacting CCL &amp; AS and will confirm if they can attend</b>

	tenants would pay for	
4) 6 <sup>th</sup> March – 2pm  <b>Hyde Lodge Common Room</b>	Leaflet discussion – provide information to tenants and assist WCC to publicise what services are provided. Discuss sheltered activities, the Buddy Scheme and how to improve engagement	A Sheltered Housing Officer  <b>Suggesting Anna Waloska &amp; Mark Corrigan attend</b>
5) 20 <sup>th</sup> March – 2pm  <b>The Boardroom, West Wing, City Offices</b>	Follow on from previous meeting – more leaflet discussion	<b>H. Emery to confirm the topic of this meeting and who may be needed closer to the time</b>
6) 27 <sup>th</sup> March – from 9:30am  <b>The Boardroom, West Wing, City Offices</b>	Final meeting – conclusions, recommendations and final report writing	<b>H. Emery and group to write report</b>

In addition to the above, two members of the group spent a day 'job shadowing' Sheltered Housing Officers (SHOs) and each member of the group spent time at a Sheltered Scheme to sit down on a one-to-one basis with a SHO. There are currently four SHOs and so the group paired up and spoke to each in turn to gather their views and get a staff perspective on the service.

At the initial meeting the group gathered all relevant information and figures that they would need to understand the service. The SHO Job Description and Classification of the current Sheltered Housing schemes can be found in Appendix 1 and 2 respectively.

## Report

To examine the Sheltered Housing Officers' use of time, the group spoke to each Officer individually to ascertain how they felt the service could be improved. This involved speaking to them about time management, whether they felt they were providing value for money, best practice and whether they had job satisfaction (questionnaire used can be found in Appendix 3). From this exercise, the group found:

- The Officers felt that if they voiced their views, they weren't always listened to or acted upon by Sheltered Housing senior management
- It was established that a mobile working solution – where Officers have tablets that they can use to access the WCC systems outside of the office – would benefit them greatly and reduce time. Tenants would also be able to witness staff reporting issues there and then
- It was noted that staff were aware of more vulnerable tenants who were susceptible to 'fall through the gaps', but that they were unable to provide contact or support as the visits were not supported financially or by time available
- With regard to time management, it was felt that some schemes did not require a whole day and therefore some of the time spent at these schemes was ineffective, whilst others did justify this time (i.e. size of scheme and tenant engagement). The group understood that, as all tenants are paying the same charges, all services provided should be uniform, but it was not felt that individual tenants were getting an equal service due to the time constraints
- It was stated, by some of the staff, that they were not 'doing the job that they had signed up to' and they were not able to provide the level of support that they could see as beneficial to tenants

These meetings with staff were valuable and the group felt that the SHOs were open and honest about the situation.

---

After examining the weekly Sheltered Housing charge the Group feel the costs are not transparent and would like to help communicate and define these costs to the wider tenant population. In addition, the Group feel that these charges are not representative of the services received. It was acknowledged that there were a lot of other costs within the wider charge and to inform tenants about these may help manage expectations.

---

When the group were addressing the aim of providing a clear definition of the Sheltered service, they came across some difficulties. It was clear from anecdotal evidence that tenants currently were unsure what the service entailed.

The WCC website states the following:

**“Sheltered Housing Services**

Winchester City Council's Sheltered Housing Service promotes a safe, secure environment for people wishing to live independently within their own home. Our aim is to promote independence and choice for older people.

In our rented sheltered housing properties you will have your own self contained accommodation which is specially designed with older people in mind and easy to maintain. All properties are linked to an Alarm Centre who will ensure that you receive the necessary response in the event of an emergency.”

Due to the changes in service after April 2015, the group feel that the term ‘Sheltered’ does not reflect the service perceived and received accurately; therefore a discussion around a change to the name of this service has been initiated. At an early meeting, Amber Russell – Housing Services Manager - welcomed a tenants' review of the name and agreed that a more suitable name could be found. It was agreed that more work needs to go into this area to determine how the service should be defined and what name would be suitable; it was even suggested that a competition open to all Sheltered tenants to choose a new name for the service could be utilised. The group feel that because the service no longer encompasses the extra level of support, previously funded by Hampshire County Council (HCC), including individual visits, the term Sheltered was misleading. They felt that the

above definition was very similar to general needs, with the addition of the link to the Alarm Centre. As far as this exercise is concerned, the group define Sheltered housing as: accommodation for the over 60's – includes a service charge for the sheltered provisions communal facilities and a compulsory life line system. It does also give tenants the opportunity to live with like minded people.

There has been a lot of discussion around the term 'care' and WCC's role. WCC are responsible for the property, living conditions and security of their schemes, but do not have the power or authority to provide 'care' and housing revenue account rules do not permit using tenant rents to fund 'care'. WCC have never been under an obligation to provide any care provision as a landlord; this is the responsibility of HCC Adult Services and is assessed as necessary. As above, WCC Sheltered schemes provide independent living with communal areas, but no individual contact. WCC will signpost or refer tenants in the right direction if personal care is needed.

It is agreed that if tenants wanted more support from WCC then this would involve higher service charges to cover this and various consultations with tenants suggest that they would not be in favour of this option. These increases would also not be benefit eligible. The service charges currently cover the cost of staffing the Sheltered service and WCC have a duty to reimburse any over payments if they arise.

At a later meeting, the group invited HCC Adult Services to discuss their role and responsibility with the group. Julie Tribble attended the meeting and the group discussed HCC's role in the care of elderly people at home. The following information has been obtained from the HCC website (correct as of April 2017):

"The government sets national eligibility criteria for adult care under the Care Act. This means people get the same access to support wherever they live.

Eligibility depends on an assessment of your needs and the outcomes you want to achieve that are affecting your ability to live well.

Hampshire County Council's Adult Services department has a responsibility to provide two types of help to people.

1. The first way is available to everyone and is Information and Advice to help people live well in Hampshire. We have launched a separate website *Connect to Support Hampshire* which offers information and advice on:
  - opportunities for living independently
  - connections to things available in your local area and nationally
  - advice to support family, friends and communities to help people with their needs
  - advice and support for carers where a person is being helped regularly by a family member or friend

You can visit the website at [www.hants.gov.uk/connectsupport](http://www.hants.gov.uk/connectsupport)

2. The second type of help is where you have care and support needs which are eligible for help from the Council (HCC). In this case, the Council will work with you to develop a plan which identifies the support you need to help you to live as independently as possible. You will be fully involved in developing this plan. There are many different options we will look at with you. This could include help from family and friends, access to local community facilities or voluntary services. We might also suggest equipment or adaptations for your home. You can find out more about these options on our Connect to Support Hampshire website. We would only provide formal 'services' such as home care or a place in a care home if your needs could not be met by these other support options. If we do arrange formal services for you, you may have to pay some or all of the costs of these services."

Julie Tribble did acknowledge that WCC do have a different levels of responsibility to those of Adult services and that different legislation surrounds this including the Care Act 2014 ([http://www.legislation.gov.uk/ukpga/2014/23/pdfs/ukpga\\_20140023\\_en.pdf](http://www.legislation.gov.uk/ukpga/2014/23/pdfs/ukpga_20140023_en.pdf)).

The Care Act places new duties and responsibilities on authorities for care and support for adults in their area. Some key aims of the Care Act are to make sure that:

- Everyone can get the information, advice and guidance they need to make good decisions about care and support
- People are supported to keep as well and independent as possible for as long as possible
- People can get the services they need to help prevent or delay their care needs from becoming more serious

- People can achieve the needs and goals that matter to them, and their wellbeing is the driving force behind their care and support.
- There is a range of good quality care providers to choose from.
- The same eligibility threshold for receiving funded social care is applied across the whole country
- Different agencies co-operate and work together to improve people's wellbeing.

(<https://connectsupport.hants.gov.uk/careact>)

A further complication arose around the 'Sheltered' bungalows and where they sit within the service. Confusion regularly arises when the bungalows are discussed; this needs to be simplified so that it is easier to digest for current and new tenants.

It was agreed that having 'Sheltered bungalows' meant that some of these tenants were led to believe that they were full 'sheltered' tenants and so deserved the same service as those in sheltered schemes. This was not the case – unless the bungalows form part of a sheltered scheme and have access to a functioning\* common room (such as Greens Close, Makins Court and Eastacre), they are not part of the sheltered service, do not pay the enhanced service charge and therefore do not receive the same level of service as those in sheltered schemes; yet are still called 'sheltered'.

\*some over 60's bungalows have access to a common room at a de-designated site (such as Simonds Court), but this does not make them sheltered bungalows. The common room is not maintained by the Sheltered Housing Team.

The group put forward that the new name for the Sheltered service would not be included in the name of the bungalows unless they formed part of a fully sheltered scheme (i.e. not used for bungalows that are not at Sheltered schemes or not linked via the Alarm Centre).

All acknowledged the need for consistency.

Sarah Turpitt – Sheltered Housing & Extra Care Manager - suggested that bungalows that are Life Line compulsory (connected to the Alarm Centre) could be called ‘Linked’ Bungalows and the bungalows that are not Life Line compulsory could be called ‘unlinked’ bungalows. This would refer to their link to the Chichester Careline facility.

Linked bungalows would have the alarm equipment installed and connected and have Health & Safety checks carried out by the Sheltered Housing Team, but **no** sheltered service provision. The unlinked bungalows would just be over 60’s properties, but have no other requirements or services linked.

The group will put forward these changes via a recommendation, but it was clear that some streamlining and simplification was needed to ensure that the different classifications could be understood and tenants, old and new, would be able to understand what services they are entitled to. A change in the name of the service will also assist with this expectation.

The group are also aware that WCC are currently considering the suitability and use of all Sheltered schemes; some may be re-termed to better suit their functionality and in the future, the Council are looking to focus more on Extra Care facilities. This is due to a recent shift in the lessening need for classic Sheltered schemes and a rise in the need for Extra Care schemes.

---

The group recognise that the aim of ‘assisting the Sheltered Team in ensuring that Sheltered tenants feel as safe and secure in their properties as possible’ was a bigger issue than originally thought. Although the group do recognise the importance of this aspect to tenants and the need to tackle it, they now see that a lot more work needs to be done to try and tackle this.

The group invited HCC Adult Services and Chichester Careline to one of their meetings to discuss communication to tenants, provision of daily calls and duty of care from HCC. The group had identified that the lack of contact resulting from the reduction in services had led

to some tenants feeling more vulnerable and isolated in their homes. Therefore, the group discussed the provision of a daily call for tenants with Chichester Careline; it was found that although this may be possible in theory, the cost to the tenant would be disproportionate. However, Chichester Careline requested to know how many Sheltered tenants would be interested in this service as resources would not allow for all tenants to have this facility.

**Sheltered Service Feedback Forms:** There was a general sense that the tenants who responded to the feedback forms felt that there was not enough offered to justify the service being called 'Sheltered'. This reflected the group's feeling and recommendation of a change of name. Out of 80 tenant responses, over 50% were dissatisfied with the service they expected to receive or had a misunderstanding of what was on offer. Others appeared to understand the service was reduced and there were positive comments.

What tenants felt the service should include:

- Safe, secure, affordable accommodation for the over 60s
- Call centre contact 24/7
- Contact with an Officer and advice where needed
- Communal lounge and cleaning

Areas that tenants would like to improve or add or feel should be included in the service:

- Repairs acted upon quicker
- Support – wellbeing, care, daily call, medical help
- Help for vulnerable tenants
- Monitoring

The group identified that there was a lot of misunderstanding around what the WCC Sheltered service should include and 'care', including medical assistance and support. However this aspect is provided by HCC through referral by a GP or Hospital. It is hoped that the leaflet produced by the group will help tackle these misunderstandings and manage expectations.

The group also asked tenants whether they would like a daily call if it was on offer and whether they would be happy to pay for this service at an extra cost. Of the 80 responses,

47 said that they would not like this service with only 22 stating that they would; but with some further comments about this depending on costs (details of which are not known). Although this daily call option appeared to be very important to some tenants, it appears that these were the most vulnerable tenants. After conversations with Chichester Careline, the fact that only a small amount of tenants would request this service may be positive as these numbers may be manageable by the call centre should this service be made available in the future.

---

It was acknowledged by the group that tenants who were aware of the previous level of service were most affected by the changes to the service in 2015 and are still uncertain about what level of support they are entitled to. Managing expectations was highlighted as a particular barrier.

To address the questions posed by sheltered tenants and to help manage their expectations, the group will create a specialist leaflet for Sheltered housing tenants which will detail the service as above, provide some signposting and answer tenants regular questions. It was also suggested that this leaflet could include some ‘real life’ experiences to tenants to demonstrate to tenants where their responsibilities and the responsibilities of WCC lie.

It was decided that the leaflet will need to include the following:

- Responsibilities – of WCC and of the tenant
- Definitions – of the service and of the classifications
- What tenants could expect
- What they are paying for in their service charge
- That the ‘sheltered’ schemes are independent living schemes – not supported housing

- Provide useful contact details for tenants who won't/can't get to coffee sessions or meetings
- Common rooms and usage?
- Buddy Scheme and other tenant-tenant support network ideas?

The group will use this report, once reviewed by senior management, to put the leaflet together. However, the group will need to work with Sheltered Housing Management to clearly define the service and decide on a more suitable name. This leaflet will then be distributed to all Sheltered Housing tenants and be made available for new tenants who may have questions about the service. It is hoped that the production of this leaflet will allow staff and tenants to better understand the service and to avoid tenants feeling like they are missing out on a service that is non-existent.

During a meeting with two SHOs, the group asked them what kind of information they felt should be included within such a leaflet. The Officers felt that this was a good idea and informed Heather Emery that they would feedback some suggestions.

---

It is hoped that the production of the above leaflet would help with the 'them and us' mentality as tenants would be able to better understand the service provided and the Officers' limitations.

Sarah Turpitt provided the group with the Sheltered Housing Information Packs that are made available to prospective tenants; it lists all the schemes and a brief description of each. The group made individual suggestions to the content, but also suggested to the SHOs that attended one of the Scrutiny meetings that the relevant sections of the pack are taken to each scheme by the attending SHO and discussed with tenants who attend the coffee sessions. The Group believed that this may help tenants to feel better included and involved

in service improvement and may help improve the feeling that their views are listened to. The SHOs agreed and would take this idea back to management.

Future relevant documents could also be brought to the tenants in the same way. This would give the coffee sessions some useful purpose and involve tenants in a more inclusive way.

---

It is widely recognised that WCC could improve certain communication channels and the group would argue that the channel between Sheltered tenants and staff is one of these areas that could be improved.

Signposting tenants to where they could seek services that WCC no longer provide would be beneficial. For example, if Chichester Careline is unable to provide this daily call, then there are other options for this provision and groups like *Silver Callers* and *Live at Home* were suggested. They provide this service at a cost (around £12 a month). It is hoped that the leaflet discussed will include some of this information. There was some discussion over the different technologies that might also assist tenants; it is important that the technology matches the client, but that there are lots of options out there.

The group also discussed mobile working solutions and it was felt, from staff and the members, that this would improve the efficiency and ability of staff as they could update/report/check things on the system whilst out and about. This mobile working solution should be able to bring together all of the systems used to gather information in one, easily accessed, place. This would also allow the SHO to report maintenance issues in front of tenants so that they can see the process and the SHO can gather all the information needed.

Another topic that has been raised repeatedly by staff and tenants is reporting repairs; the group discussed the issue of calling maintenance issues through to the main number. It was suggested by the group that Sheltered Tenants should have their own number for reporting

maintenance issues direct. It was noted that some call takers are unaware that the caller they are speaking to is from Sheltered Housing and Sheltered Housing offers a different level of service.

---

Finally, the group discussed how they could assist with improvements to the ‘Buddy Scheme’. The Buddy Scheme started at Godson House\* and involves a number of tenants (maybe three or four) agreeing to be ‘buddies’ who, via a leaflet printed by Tenant Involvement so as not to cost any individual, distribute their contact details so that all tenants at that scheme are able to call on these tenants for support if needed. Support includes things like; picking up some supplies if ill and unable to leave the house, collecting a paper or just a friendly chat. The aim is to make tenants feel more supported, less vulnerable and have someone that they can go to should they need it. The scheme is now up and running at Makins Court also.

\*As far as the Tenant Involvement Team are aware. Other schemes may have started informally before this.

Staff and tenants can see how valuable the Buddy Scheme could be for tenants and agreed that it should be promoted and supported wherever possible. The Tenant Involvement team confirmed that they will provide design work and printed materials wherever needed.

In addition to the Buddy Scheme, some schemes have started organising their own events – the SHOs noted that this could have been inspired by other tenants visiting from schemes that do have their own activities. It was also noted by the group that tenants had expressed very positive feedback when other tenants had visited their schemes to chat and network. Bearing this in mind, it was agreed that, where possible, the tenants and staff will encourage and enable these inter-scheme visits. Some further visits have already been arranged.

The Group’s leaflet will include details of the Buddy Scheme and any other activities that tenants can utilise to create a more inclusive, community feel at schemes.

Although the group seek to tackle the issues above in the ways stated, there is still a concern about vulnerable tenants living within WCC Sheltered Schemes. SHOs stated that because they are no longer knocking on individuals doors, they are only seeing about 60-70% of tenants at a scheme, therefore there are around 30% that they never see or speak to. Some of these tenants will be working still or have other support networks, but some won't and these are the vulnerable ones. Other tenants do notice when someone has not been seen for a while and will ask staff to check on them; in these circumstances SHOs are allowed to knock on the door and check on the tenant's welfare. It was also highlighted that Police no longer provide this routine 'welfare check' service.

Some form of flagging system may help alleviate this issue, but this raised further issues around what would constitute a vulnerable tenant and then what support would be in place if these tenants required; including who would provide the support. There was no easy answer, but the group would like to see some further work into this area. The issue of wider social isolation was still not being tackled by the current system; some tenants are not able to get out to the common room or feel excluded for various reasons. These are the people that could fall through the 'gap'.

## Conclusions

The group were pleased with the progress of this Scrutiny project; they felt that they worked together well as a group and the timetable created at the beginning of the project meant that they had clear topics for discussion at each stage. The outcomes are partly as predicted, but the way forward is less straight forward than imagined.

The group initially carried out visits to all schemes to speak to Sheltered tenants; this was found to be valuable for the group – gathering tenants' views and anecdotal evidence – but was also valuable for the tenants who attended as it was clear that they missed meetings with WCC to chat about issues that arise at schemes. The group found it clear from these visits that not all Sheltered tenants understood what the Sheltered Housing service offered to tenants; the subsequent tenant survey also showed that there was a lack of understanding around what services were available from WCC.

These visits also helped to raise the profile of the tenant Scrutiny group with the wide tenant population and the group felt that these meetings helped build trust with tenants. They would like to continue this relationship and build on it by producing a useful leaflet to impart the knowledge that they have uncovered.

The group do acknowledge that, as they have a better understanding of the service than most tenants, they now have a responsibility to pass this on to more tenants.

The group felt well supported by their Tenant Involvement Officer (TIO), but felt that the response from other officers and senior management was not as forthcoming. For instance, the SHOs were not informed about the group's visits to speak to them by their management even though management were informed prior to visits. This caused some avoidable ill

feeling and unease at the onset as staff felt that they were being personally scrutinised. With better communication this could have been avoided. When this was overcome, SHOs were happy to interact with the group and work with them. The group were also disappointed that the Mystery Shopping exercise that was to be organised by WCC to give a more in-depth view of the Sheltered service was not undertaken in time for this final report and at the current time has still not been initiated.

With regard to the SHOs the group felt that, when speaking to these Officers about how they viewed the WCC service, the Officers were open and honest with this and this made this exercise useful. After the above initial challenges, the group hope that they built trust with these Officers and were able to work together.

The group identified some key lessons from this exercise:

- A communication issue exists between the Sheltered Housing Team and the Sheltered Tenants. This needs to be addressed and simplified where possible.
- There is a lot of confusion and conflict over whether Sheltered tenants are getting value for money with regard to the service received.
- When carrying out a consultation, offer tenants an opportunity to provide positive feedback.
- To provide relevant WCC Officers with a briefing before the scrutiny/consultation exercise so that everyone is on board and a consistent message is achieved.

The group feel that the main area to be tackled is the name of the service. The term Sheltered provides a false impression and does not match up with many tenants expectations. The group feel that the service changed two years ago when HCC funding ceased and therefore the name should reflect this new service. However, it was also found that the majority of tenants did enjoy living in WCC Sheltered Housing.

## Recommendations

Following on from the above investigations in the report; the group put forward the following recommendations:

1. To change Officer rotation to quarterly so that Officers rotate more regularly than currently and provide a ‘fresh’ set of eyes at each scheme. This has already been agreed by senior management (Amber Russell), but needs to be implemented.
2. After speaking with staff and examining their role, the Group strongly feel that a mobile working solution should be found for the Sheltered Housing Officers. This would include the provision of a tablet (or similar) to each staff member so that they could update IT systems on site and report repairs in front of tenants – showing the tenant that the report has been acted on. It is felt that this solution will improve officers’ use of time and tenants’ peace of mind.
3. It was agreed that the 6 monthly checks would include a check of the key safe numbers, if not already included. This could include a check of the key safe number, whether the keys are present and that the tenant understands its use. This recommendation has been put forward to ensure that the key is available in an emergency.
4. The Group recommend that the name of service be changed. They do not put forward a final name as this is open for wider discussion between officers and tenants; however Senior Living or Retirement Living, as examples, has been suggested as a more appropriate name. It is felt that the name does not reflect the service currently provided and a change of name would make expectations more clear. This feeling was mirrored by the tenant feedback forms.

5. A dedicated Sheltered repairs number would make reporting repairs much easier for some of WCC's most vulnerable tenants. There have been various issues arising from having to go through the general customer services line and satisfaction is low in this area. It was found that many of the Customer Service staff members were not aware of what a 'Sheltered' property consists of and what service is expected.
6. The word 'surgery' is to be removed from SHO vocabulary. This word has been used to describe the weekly sessions with the scheme's SHO. Although this term is widely used, it has caused confusion and does not reflect the service offered.
7. Better signposting for tenants to care providers and other support facilities. As WCC do not provide the same level of service as previously, tenants who may have depended on these services should be signposted to providers who could fill these gaps. The tenant led leaflet should help with this recommendation, but it will need to be built in to SHO's advice and knowledge.
8. An examination of the Sheltered Housing weekly service charge; what this cost covers and whether it is offering value for money to tenants. This could include a tenant led Scrutiny Project.

In response to this report, the Group require a formal response to the above recommendations and would like a meeting arranged to allow a conversation around this project between the tenant members, senior managers and relevant Councillors.

## Glossary

WCC – Winchester City Council

HCC – Hampshire County Council

OP PRG – Older Persons' Performance Review Group

PRG – Performance Review Group

SSSG – Sheltered Services Scrutiny Group

SHO – Sheltered Housing Officer

TIO – Tenant Involvement Officer

## Appendices

### Appendix 1: Sheltered Housing Officer Job Description



## JOB DESCRIPTION

**JOB TITLE:** Housing Officer (Sheltered Services)

**DEPARTMENT:** Housing Services

**POST NUMBER(S):** TBC

**GRADE:** Scale 4

**ACCOUNTABLE TO:** Sheltered & Extra Care Housing Manager

**LOCATION:** District Wide

**POST OBJECTIVES:**

To be responsible for the day to day management of Council sheltered housing and associated communal areas. To maintain a safe, secure and clean environment in the buildings and the surrounding grounds, by carrying out regular checks and observations. To deter crime, anti-social behaviour and breaches of tenancy conditions, working closely with Housing Officers and other Council teams. To promote capacity for independent living and community cohesion.

**SPECIFIC TASKS:**

**Health & safety, buildings, grounds and equipment**

1. Undertake health & safety checks of communal areas and surrounding grounds ensuring compliance with requirements.
  
2. Monitoring and prompt reporting of repairs and servicing issues in communal areas, including lighting, lifts, fire alarms and other fire equipment, door entry systems, laundry/kitchen/guestroom/common room equipment.

3. Test all community alarm systems including pull cords, pendants and wall units in properties and communal areas every 6 monthly ensuring they are always in working order, report any problems and keep accurate records.
4. Monitor the standard of cleaning and grounds maintenance in communal areas to ensure works are undertaken in compliance with contract standards, reporting any issues to the Principal Area Housing Manager (Estate Services).
5. Be responsible for the letting, collection of fees, care of bedding, laundering of linen and cleaning of communal guestrooms and common rooms.
6. Removal of litter and rubbish, including bulky items in communal areas.
7. Reporting environmental problems such as fly tipping, vandalism, graffiti, sharps removal etc in communal areas.
8. Undertake minor or emergency cleaning, as required in communal areas.
9. Assist with minor repairs, such as changing light bulbs, unblocking refuse chutes in communal areas.
10. Read electric and gas meters for communal areas on a monthly basis.
11. Provide tenants with appropriate guidance to enable them to utilise and benefit from the facilities and services provided at the scheme, including how to use the communal equipment.
12. Ensure tenants are issued with copies of fire procedures and are familiar with the relevant requirements.
13. Assist in keeping the schemes secure and the tenants safe from harm.

#### **Scheme management**

14. General management of the Sheltered Housing Schemes.

15. As a facilitator, ensure that tenants receive the care, support and other services provided by other agents and arrange sign posting or access to services appropriate to tenants needs.
16. Liaise closely with the Community Alarm Service and Housing Officers to ensure any changes in circumstances, medical history or concerns over health and wellbeing of any tenant are notified.
17. Discuss the sheltered housing service with housing applicants and in conjunction with the Void Property Officers, undertake property viewings and conduct open days providing information on sheltered housing schemes.
18. Attend tenant sign-ups with the Housing Officer as appropriate.
19. Welcome all new tenants to the scheme and advise on matters relating to the scheme, including the use of the community alarm system and assist them with settling into the scheme.

### **Empty properties**

20. Monitor empty properties to ensure they are safe and secure

### **Community**

21. Make suggestions for estate improvements work and assist with the consultation process.
22. Promote and get involved in community activities, such as Street Meets and other estate events and residents meetings.
23. Have an awareness of vulnerable people and liaise with Housing Staff regarding any concerns.
24. Welcome new residents and advise on matters relating to their block.
25. Organise, promote and get involved in community activities, including attending community and residents meetings
26. Encourage service users to express their views of the service in order to bring about service improvements.

### **Nuisance & anti-social behaviour**

27. Work with the Tenancy Services team and others to deal with and prevent incidents of nuisance and anti-social behaviour.
28. Report to the Tenancy Services Team any issues relating to breach of tenancy, including pets, items left on landings, and disputes amongst residents, such as car parking.
29. Promote good neighbour relations amongst residents

**General**

30. In carrying out the above tasks, liaise with Housing Staff, other Council departments, contractors and other agencies as required.
31. Keep accurate records of tasks undertaken, as required.

**OTHER TASKS:**

32. Adhere to the Council's Health & Safety, Customer Care, Equal Opportunities, Confidentiality/Data Protection, Safeguarding and other relevant policies.
33. Wear the designated uniform and identification badges, carry mobile 'phone and be available for contact during working hours.
34. Work outside in all weathers.
35. Conduct yourself in a helpful and professional manner, being polite, positive and considerate to residents at all times.
36. To undertake occasional evening and weekend work.
37. Undertake any other duties commensurate with the post.

**Signed:** .....

.....

**Date:**


**Winchester**  
 City Council **PERSON SPECIFICATION**

**JOB TITLE**      **Housing Officer (Sheltered Services)**      **POST NUMBER:**    **TBC**  
**DEPARTMENT:**    **Operations**                          **DATE:**                **November 2014**

Requirements		Weighting	Assessment method
Skills	<ul style="list-style-type: none"> <li>• Good listening &amp; communication skills</li> <li>• Empathetic, open-minded &amp; able to build trust with residents</li> <li>• Tact &amp; an ability to manage conflict</li> <li>• Ability to prioritise tasks</li> <li>• Accurate record-keeping</li> <li>• Excellent customer care skills</li> </ul>	3 3 3 3 2 2	A/I A/I A/I A/I A/I A/I
Experience	<ul style="list-style-type: none"> <li>• Experience of working effectively with older people</li> <li>• Experience of dealing with difficult customers</li> </ul>	3 2	A/I A/I
Personal qualities	<ul style="list-style-type: none"> <li>• Confident &amp; assertive</li> <li>• Motivated to work independently</li> <li>• Proactive to problem solving</li> <li>• Good team player</li> <li>• Flexible approach to work</li> </ul>	3 3 3 3 3	A/I A/I A/I A/I A/I
Specific job requirements	<ul style="list-style-type: none"> <li>• Committed to high quality customer care</li> <li>• Full driving licence</li> </ul>	3 3	A I

	<ul style="list-style-type: none"> <li>• Reasonable level of fitness</li> <li>• Ability to work occasional evening &amp; weekend</li> </ul>	3 2	A/I I
Qualifications	<ul style="list-style-type: none"> <li>• Minimum 4 GCSEs, including Maths &amp; English, Grade C or above</li> <li>• Educated to A level standard or equivalent</li> </ul>	3 1	A A

*Weighting:*

3 – Essential for the successful performance of the job

2 – Desirable but can be achieved through on the job training or experience

1 – Useful but not essential for successful performance of the job

*Assessment:*

<i>Application Form</i>	<i>A</i>	<i>Interview</i>	<i>I</i>	<i>Tests</i>	<i>T</i>
<i>References</i>	<i>R</i>	<i>Presentation</i>	<i>P</i>	<i>Evidence of Qualifications</i>	<i>Q</i>

*Correct as of November 2014*

## Appendix 2: Sheltered Scheme Classification

Sheltered Housing Classification from 1st April 2015

<b>Sheltered Housing Schemes</b>	No. Sheltered Units	No. Other Units	Property Type
Eastacre, Weeke	35	1	Flats & Bungalows
Godson House, Winchester	35	1	Flats
Greens Close/Blanchard Road, Bishops Waltham	37	1	Flats & Bungalows
Hyde Gate, Winchester	15	3	Flats
Hyde Lodge, Winchester	38	0	Flats
King Harold Court, Winchester	33	0	Flats
Lawn House, Winchester	36	1	Flats
Makins Court, Alresford	52	0	Flats & Bungalows
Mildmay Court, Winchester	35	0	Flats
Normandy Court, Wickham	36	1	Flats
Richard Moss House, Winchester	49	0	Flats
White Wings, Denmead	19	14	Flats
<b>12 schemes</b>	<b>420</b>	<b>22</b>	
<b>Bungalow/Over 60s Schemes</b>	No. Sheltered Units	No. Other Units	Property Type
Chester Court, Winchester	35	0	Flats
Simonds Court, Abbotts Barton	29	1	Flats & Bungalows
Spring House Close, Colden Common	36	1	Flats
Airlie Corner, Stanmore	10	0	Bungalows
Drummond Close, Stanmore	9	0	Bungalows
Firmstone Road, Winnall	16	0	Bungalows
Lisle Court, Stanmore	5	0	Bungalows
Meadow View, Micheldever	8	0	Bungalows
Northfields, Twyford	27	0	Bungalows
Pine Road, Bishops Waltham	25	0	Bungalows
Springvale, Swanmore	39	0	Bungalows
Southbrook Cottages, Micheldever	9	0	Bungalows
Stoney Lane, Weeke	16	0	Bungalows
Wonston Close, Sutton Scotney	25	0	Bungalows
<b>14 schemes</b>	<b>289</b>	<b>2</b>	

<b>Extra Care Schemes</b>	No. Sheltered Units	No. Other Units	
Danemark Court, Winchester	36	0	Flats
Matilda Place, Winchester	20	0	Flats
<b>2 schemes</b>	<b>56</b>	<b>0</b>	

<b>General Needs Schemes</b>	No. Remaining Sheltered Units	No. General Needs Units	
Airlie Corner, Stanmore	3	5	Flats
Bartholomew Close, Winchester	12	2	Flats
Chiltern Court, Alresford	9	16	Flats
Colson Close, Winchester	2	19	Flats
Drummond Close, Stanmore	6	21	Flats
Firmstone Road, Winnall	11	19	Flats
Harwood Place, Kingsworthy	7	32	Flats
King Alfred Place, Winchester	7	1	Flats
Lisle Court, Stanmore	4	13	Flats
Monks Road, Winchester	6	1	Flats
Penton Place, Highcliffe	12	25	Flats
The Valley, Stanmore	11	26	Flats
40A - D Water Lane (Chester Court), Winchester	4	0	Flats
<b>13 sites</b>	<b>94</b>	<b>180</b>	

## Classification of WCC Older Persons Accommodation

### Sheltered Schemes

The following are Full Sheltered Schemes and the tenants all pay a service charge of £10.25 per week for the Sheltered Housing Management Service and 99p for the Alarm Service.

Eastacre

King Harold Court

Hyde Lodge

Hyde Gate

Greens Close

Makins Court  
White Wings  
Richard Moss House  
Godson House  
Lawn House  
Mildmay Court  
Normandy Court  
Matilda Place  
Danemark Court

These tenants **cannot opt out** of either the Alarm Service or the Sheltered Housing Management Service.

### **Bungalow Schemes**

Bungalow Schemes are classified as older persons accommodation, rather than sheltered housing schemes. The tenants here do not pay the Full Sheltered Housing Management charge but they are required to pay the charges for the Alarm Service and an Estates Service charge. Tenants **cannot opt out** of the services provided at the Bungalow Schemes. The Sheltered Housing Team maintain the alarm connection and a 6 monthly visit to undertake pull cord checks together with a visual inspection of the area for Health and Safety reasons at these Bungalow Schemes but no other services.

Wonston Close  
Airlie Corner (bungalows)  
Drummond Close (bungalows)  
Firmstone Road (bungalows)  
Lisle Court (bungalows)  
Meadow View  
Northfields  
Pine Road  
Springvale  
Stoney Lane

## Over 60's schemes

We also have the following Over 60's Schemes:

Chester Court

Simmonds Court

Spring House Close

These schemes are restricted to tenants aged 60 and over. Similar to the Bungalow Schemes they are classified as older persons accommodation and do not pay the Full Sheltered Housing Management charge. Like the Bungalow Schemes they pay for the Alarm Service and the Estates Service and **cannot opt out** of these services. The Sheltered Housing Team will provide the same services as per the Bungalow Schemes listed above.

## General Needs Sites

The following sites were previously Sheltered Housing and Over 40s Schemes but are now General Needs Sites:

Airlie Corner

Bartholemew Close

Chiltern Court

Colson Close

Drummond Close

Firmstone Road

Harwood Place

King Alfred Place

Lisle Court

Monks Road

Penton Place

The Valley

40A- 40D Water Lane

Tenants at these sites were given the option to opt out of the Alarm Service post April 2015 if they were previously paying for this service. Those tenants who chose to keep the Alarm Service are classified as Older Persons, similar to the Bungalow Schemes and the Older Persons Schemes. They too pay the charge for the Alarm Service and the Estates Service. The Sheltered Housing Team are responsible for

providing the services related to the Alarm Service. The Estates Team undertake the Health & Safety checks at some of these sites but the Sheltered Team have responsibility for those where there are Older Persons Bungalows at these sites (see above).

Over time there will be no further 'Older Persons' living at these sites and then any tenant wishing to have assistance will need to become a Lifeline customer.