

Aids and Adaptations Policy

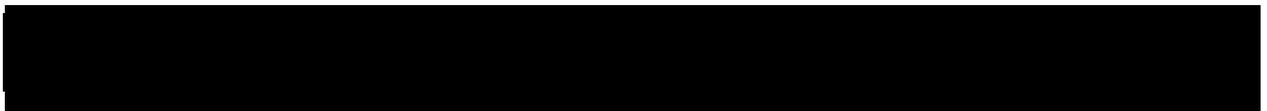


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Introduction

We are committed to providing a medical adaptation procurement and management service that addresses the needs of our tenants.

The duty lies with the local authority to meet eligible assessed needs (Guidance on the Provision of Equipment and Adaptations 2009).

We seek grant funding annually from the Scottish Government and from the City of Edinburgh Council. Our Board of Management may also choose to commit annual funding for medical adaptations.

Aims

The aims of this policy are to:

- set out the criteria by which we will assess requests for medical adaptations to our properties, and
- reconcile the expectations of customers in need of adaptations with our requirement to manage stock effectively within available resources.

Identifying Needs

Tenants of any age can apply for an adaptation for themselves or members of their household, but there must be a proven need.

If a tenant or someone in their household is older, disabled, or less able to manage personal and domestic tasks, or if their carer's own health is at risk from assisting, then an adaptation may be of benefit.

An annual review of spend on adaptations, including costs, types of adaptation and trends will be undertaken to ensure the adaptation policy and the associated budget is effective and appropriate.

Assessing Tenants' Needs

Where works are under £300, we do not consider it a good use of resources for local authority Occupational Therapist (OT) and therefore will accept a self-referral from the tenant or their representative. This will be restricted to only one self-referral per client per annum. Thereafter, an OT referral will be required to enable a holistic assessment of the individual's needs. For works over £300 a referral will be required from an OT.

We are not qualified to make any judgement on the needs of tenants and all tenant queries will be referred back to the OT. When an OT makes a decision not to issue a referral, tenants can appeal this decision through Social Care Direct. Approaching their MP for assistance is also an option.

Related Documents/Legislation

Procedures for Funding of RSL Adaptations 2012/13 ref. SHGN 2012/14

Procedures for HAG Funding of Stage 3 Adaptations ref. SHGN 2001/02

CRE Equalities – fairness and access
CRE Tenancy Sustainment
CRE Older Person’s Strategy
CRE Asset Management Strategy

Funding Minor Adaptations (under £300)

We will set an annual small adaptations budget to meet the need for adaptations in existing stock. Small adaptations are considered to be valued at less than £300 and normally consist of grab rails or hand rails.

A strict annual budget will be set for small adaptations and works will be done on a first come first served basis.

Major Adaptations

Larger adaptations to tenant’s homes, such as level access showers, wet floor showers, stair-lifts, special baths, ramps and so on. can be provided by us, but a grant will be required to carry out the work.

The conditions of the grant will be adhered to at all times.

A referral will be required for all work over £300 and the nature of the required referral is set out in the procedure. We will only accept referrals from Occupational Therapists. All referrals must be prioritised by the OT.

An annual budget will be agreed with City of Edinburgh Council for our Edinburgh properties and with Scottish Government for properties outwith Edinburgh for adaptation work.

Where we receive referrals over the value of grant funding allocation, The City of Edinburgh Council and Scottish Government will be approached to see if additional grant is available.

Significant Adaptations

We may receive a referral or an approach for works which involve a substantial investment; above £10,000, to make a property suitable.

Where extensive work is required to a property in order to make it suitable for the resident the following considerations will be taken into account:

- The availability of more appropriate housing within the area
- The cost of the works
- The availability of funding
- Where appropriate any additional rent increase or service charge that may apply

- and the tenants agreement to pay for any such charges
- The appropriateness of the remainder of the property following works. For example a ramp can be installed but the resident cannot access the bathroom;
- Decanting costs/arrangements for temporary accommodation during the works if tenants can't stay in their home whilst the works are on site;
- The impact of an extension on the garden and grounds.

An initial assessment will be made by the Project Officer for discussion with the Housing Manager and Procurement & Investment Manager, at which point a final decision will be made.

The funding body will then be contacted to agree the most appropriate technical solution, as well as terms of funding approval – e.g. timescale, procurement route. CRE will reserve the right to proceed with an alternative solution than approved by the funding body if they feel appropriate – this will always be approved by the Head of Property.

Prioritisation

Occupational Therapists will be required to prioritise their referrals to us. We will carry out works in priority order. Thereafter we will carry out works in order of the date of referral. So where there are two referrals both Priority A but one referred on 1/4/16 and another on 1/5/16, the adaptation dated 1/4/16 will be carried out first.

Procurement

Reference should be made to the current Scottish Government procurement policy (SHGN 2001/02) to ensure all tenders are compliant.

Options for Adaptation

Investment Programme

As part of the planning process for investment, we will establish whether there are disabled people living in the households targeted for improvement. Where such households are identified, we will aim to ensure that the improvements meet their needs. For example, if a bathroom is to be renewed then consideration will be given as to whether grab rails are required or a level access shower needs to be fitted.

A separate budget for replacing major adaptations (wet floor shower rooms) when they come to the end of their life will ensure that tenants continue to benefit from adaptations. Grant cannot be claimed for a major adaptation to be replaced.

New Build Programme

We will ensure that all new build properties are built to barrier free standard at ground level, in compliance with "Housing for Varying Needs" design guide published by

Communities Scotland. All single storey ground floor one and two bedroom properties will have a wet floor shower room and glazed panels in the kitchen wall units.

Further design considerations:

- No mixer taps. Preferably lever taps, easily marked with hot and cold.
- Contrasting colour on the wall behind toilet/wash hand basin etc.
- Contrasting colour on rails and toilet seat.
- Traditional plugs for wash hand basin.
- Contrasting colour or skirting between the floor and walls.
- Two door access to enable assistance if someone falls in the bathroom.
- Easy to use shower fittings.
- Large shower area to allow for a shower seat if needed and low profile tray or proper wet floor shower – special consideration to the water drainage to avoid flooding into other rooms and the room remaining slippery after a shower.

Transfer to an Adapted Property

We will not force a tenant to move out of a property if their home no longer meets their needs. Their housing officer can investigate the following options, before a medical adaptation is considered:

- **Care package:** it may be possible for the local authority social work department to offer support to allow the tenant to remain in their home;
- **Transfer:** Should the tenant want to move into a more suitable property, they can apply for a transfer, mutual exchange or management transfer (only applicable if they are at risk) via Edindex or Home Hunt.

We will not undertake large adaptations in a property where the tenant is seeking a transfer to a new property. If the new property requires a new adaptation, we will seek an OT referral for this work.

Reallocation of void properties

During the reallocation process, a new tenant with particular medical needs is sometimes identified. The Lettings team will contact the P&I team to establish if an OT referral can be gained, to carry out works when the property is void.

If this is not possible; or if an OT referral will take too long; we will self-fund the medical adaptation to allow the tenant to move into their home. This will be funded from the voids budget.

Guarantees

The Project Officer will ensure that all guarantees for showers and so on will be filled in and sent off to the manufacturer for all equipment as appropriate; this is likely to apply to showers, specialist bathing equipment etc.

A permanent flag on Northgate will be added with details of the guarantee conditions and which supplier a repair should be raised to. This is not normally PMD because of the specialist nature of the equipment, and the guarantee conditions.

All guarantees will be stored on PIMMS.

Defects

All works will be subject to a 1 year defects period with the works contractor. Further guarantees for special equipment may also be available.

Defect flags will be added to Northgate which will highlight which supplier to raise defect repairs to, and the date of the end of the defects period.

The element section of Northgate will be updated after every adaptation to ensure this data is available for the rest of CRE.

Timescales for works

The timescale in which works are completed after receipt of a request for adaptations is as follows:

	Target time*
Minor Adaptation	10 working days**
Major Adaptation	8 weeks**

*Subject to available funding

**From receipt of OT referral

Customer Satisfaction

Following completion of the works the Project Officer will send out the Adaptations Satisfaction Survey to ensure that feedback from customers informs our continual improvement. These will be collated and a reported on a quarterly basis by the Project Assistant to the P&I Manager, for inclusion in the Quarterly Operational Performance Report to Board.

Performance data and evidence

Report data is required and validated evidence for the Annual Return on the Charter (ARC) and for reporting on our performance against the outcomes in Scottish Social Housing Charter.

Finance

Grant Claims

Claims must be submitted at the earliest opportunity but only when the Project Officer is sure that all expenditure relating to an adaptation has been collated.

Claims will be submitted on a quarterly basis as per the Offer of Grant (July, October, January and March).

- The Grant Claims and Monitoring Workbook will also be sent with each batched claim in order to allow the Scottish Government to monitor patterns of expenditure.
- The Project Officer will have responsibility to ensure that the workbook is maintained at all times.
- Any discrepancies between the invoice and amount claimed will be brought to the attention of the Procurement & Investment Manager at the earliest opportunity.

Budget Monitoring

The Project Officer will ensure that the Stage 3 Address list spreadsheet as well as the Minor Works budget spreadsheet is kept up to date to ensure that the budget is managed effectively and monthly spend can be reported via the Operational Quarterly Report.

The Procurement & Investment Manager has overall responsibility for the budget.

Invoicing

For every claim made, an invoice should be raised, with 2 lines (admin charge and works) to ensure the grant is assigned to the correct expenditure.

Zero rating of VAT on Adaptations works

The contractor carrying out any adaptation work for us will make the final judgement on whether or not VAT will be applied; however, it is the expectation of the funder that most works will be zero rated.

For the purposes of zero rating adaptations given that we have charitable status any works must be for the 'personal and domestic use' of an eligible person or collection of persons. For the full list the assistant should refer to the VAT Notice 701/7 August 2002.

It is not sufficient for zero-rating that the equipment or appliance is merely destined or intended for use by a disabled person, or is mainly purchased by disabled persons. For example, general purpose equipment such as most computer hardware, ordinary or orthopaedic beds, orthopaedic or reclining chairs may benefit a disabled person, but are designed for general use or for use by disabled and able bodied people alike. Such products are not eligible for relief.

In order for a contractor to zero rate an adaptation the Declaration attached at Appendix A should be completed by the Project Officer. If the Project Officer is in any doubt this should be discussed with the P&I Team Leader.

Rent Review and Service Charges

Head of Housing will review the rent of a property where major works are carried out to create additional room(s) in line with the Rent Policy and with due regard to the Disability Discrimination Act 1995.

Appendix A - Eligibility declaration by a charity

Please note there are penalties for making false declarations

Customer

If you are in any doubt as to whether you are eligible to receive goods or services zero-rated for VAT you should consult VAT Notice 701/7 VAT reliefs for disabled people or contact the National Advice Service on 0845 010 9000 before signing the declaration.

I (full name and status in charity)

of (name and address of charity)

.....

declare that the charity named above is receiving from: (name and address of supplier)

* the following goods which are to be made available to a disabled person or persons for domestic or their personal use:

(description of goods)

* the following services to adapt goods to suit the condition of a disabled person to whom the goods are to be made available:

(description of services and goods)

* the following services of installation, repair or maintenance of goods:

(description of services and goods)

* the following building alterations at (address of building):

(description of alterations).

* the services of monitoring a personal alarm call system and I claim relief from value added tax.

.....(Signature)

.....(Date)

Supplier

I (full name)

of (address)

.....

am supplying to the charity named above:

* the following goods which are to be made available to a disabled person or persons for domestic or their personal use:

(description of goods)

* the following services to adapt goods to suit the condition of a disabled person to whom the goods are to be made available:

(description of services and goods)

* the following services of installation, repair or maintenance of goods:

(description of services and goods)

* the following building alterations at (address of building):

(description of alterations).

Note to supplier

You should keep this declaration for production to your VAT officer. The production of this declaration does not automatically justify the zero-rating of the supply. You must ensure that the goods or services you are supplying qualify for zero-rating.

* the services of monitoring a personal alarm call system

..... (Signature)

..... (Date)

* Delete words not applicable