



Charnwood Sheltered Housing and Lifeline

Charnwood Borough Council

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This Options Report is supplemented by a **Position Statement** which draws together key information about the Lifeline and Warden Service as they are delivered currently, in Charnwood.

A: GLOSSARY

CAS	Community Alarm Schemes –properties which have hard-wired community alarm systems but not physically linked to communal facilities.
Control Centre	The place which receives and responds when community alarms (hard-wired and portable) are activated either by the user or by ‘sensors’ e.g. smoke, fall
(The) Council	Charnwood District Council
County/LCC	Leicestershire County Council
Data Protection	Refers to the Data Protection Act which prevents personal data being transferred without an individual’s express permission (although this can be covered by a general signed statement allowing transfer in certain circumstances.
Disaster Recovery	A backup arrangement should the control centre ‘fail’. E.g. there is a serious fault which means that the centre cannot receive or response to alarm alerts. In this vent alarm alerts are diverted to another Control Centre. This is a pre-arrangement with clear protocols in place.
Fairer Charging	Department of Health “Fairer Contributions’ guidance on reasonable charges being made for t services by Social Services and principle calculating an individual’s contribution to their personal budget.
Hardwired Community Alarm System	The community alarm service is provided via wiring within the building and is therefore not dependent upon a separate telephone landline. The alarm is activated through pull-chords located in various rooms in individual dwellings and in communal areas. Fire alarms and smoke detectors are usually connected to hard wired systems. Alarm activation can be dealt with by the warden if they are ‘on-site’ through a ‘hand set’ or will alternatively be re-routed to the alarm monitoring centre (control centre).
Lifeline Services	Community Alarms Services (whether in practice they are called that)
Lone Worker Service	This service is provided through a facility/software included in the current and future PNC. This enables staff of any organisation to pre-register then call in to say that they are working alone and will phone in by certain time to confirm they are safe. If they do not, a responsible person in their organisation is automatically contacted so they can investigate. This is a ‘background’ function with virtually no need for staff to get involved.
Pendants	These are ‘alarms’ which can be worn by the end-user – either as a ‘necklace’ or as a ‘watch’. They radio-connect to a portable alarm unit as long as they are in range. The range depends upon the type of portable alarm unit being used but is usually within the home and an average size garden.
Portable Alarm Unit	These can be located anywhere as long as they can be linked to the Control Centre via a telephone landline. They are installed by programming the unit on site. They enable a basic user alarm alert service can also support a range of sensors.
PNC	PNC is the hardware and software that enables the community alarm system to function. It is the ‘brains’ of the system. Usually described with a number. The higher the number usually the

	more recent the design and the higher the level of sophistication.
Sheltered Housing	Grouped properties with hard-wired community alarms systems and physically linked communal facilities.
Telecare	This refers to a range of sensors that can monitor activity (or lack of activity). This can include falls sensors; bed sensors (e.g. people getting out of bed; flood sensors; etc.
Telecare Services Association (TSA)	A membership organisation which sets quality standards for the Telecare providers and gives advice and support to members.
Telehealth	This is where electronic sensors monitor vital health signs remotely either in their home or while in their home. These readings are automatically transmitted to a trained person who can interpret the results and decide whether any intervention is necessary.
Warden Service	A service provided to tenants in Sheltered Housing and CAS schemes which varies according to individual assessed need.

B: BACKGROUND

Charnwood Borough Council selected Sitra to undertake a review of its Warden and Lifeline services to identify future options.

Key Tasks

This report considers:

1. Options available to Charnwood in the provision of sheltered housing going forward-looking at roles of staff and levels of staffing possible within given levels of income
2. The opportunity for any costs to be recouped via Housing Benefit through a revised rent/service charge structure within the current model
3. Options for provision of a revised sheltered scheme service, where a greater element is eligible for Housing Benefit through revising JDs of staff to incorporate a greater housing management role and reflecting the lower level of support as a result of the withdrawal of Supporting People funding
4. The cost implications of various models for residents
5. A review of current Lifeline service(s) and recommendations on a way forward
6. Technology-the options available, compatibility with existing equipment, the cost and the range of providers and support arrangements

Process

An initial Position statement report was produced to confirm that we had understood the current position statement in Charnwood and to ensure any assumptions or calculations were based on the correct premises.

This Options Report builds on that information and brings together the following areas of activity;

- Information provided by the Council, on request from Sitra
- Desk top research including series of telephone interviews
- Observation of staff in their role
- Knowledge and experience of the Sitra Team

Our thanks to all those who gave the time to provide information for this Report.

C: CONTEXT OF OUR WORK

1. Quality of Data Sources

This work has been undertaken in a very short timescale and therefore it has not been feasible to generate a lot of new 'data' on which to base our assumptions.

In most cases we have had to rely on existing data, new but short term data and data that has not been collected in such a way that it best informs what we need to know.

Throughout this report we will put the data sources and assess their robustness. But in most bases we will be suggesting that data is re-collected in a more robust and thorough way and over a longer timescale to ensure that the decisions are based on solid foundations.

2. Concentration on the Short Term

Because of the immediacy of some of the issues facing the Council, we have focussed on the short term. However, we also have included options for the medium to longer term.

3. Ageing Well in Charnwood

In particular we would suggest that instead of thinking of 'older people' you think of 'prevention activities and support needed for age-related ill-health and loss of faculties'.

Older people are not a generic group. Most people would like to 'be active until the day they die'. Support should be available to achieve this, but also to enable people to get the best from life even when this ideal cannot be a reality. Diversity and flexibility of support is a crux of positive ageing. The extra-care principle of support and care shouldn't just apply to particular schemes.

4. Seeing Assets not just Age

People in retirement are time-rich, knowledgably, experienced. If motivated they can be keen to 'give back'. They are often carers both of young and the old. At 70 you may be caring for your young grandchildren or your parents in their 90s.

5. The 'New Old'

The 'Mick Jagger (71) generation' will be followed by the Madonna (56) generation. They will be more technology savvy, healthier, more affluent, more rights-orientated; and live longer! But at some point most will become vulnerable. Families may live in different continents and some communities may have a concern-deficit. Some people will become housebound, and (despite Botox) isolated.

The challenge will be to have support services that are responsive, compassionate, and affordable by all.

6 Options rather than recommendations

Generally, our findings are presented as options, rather than recommendations. However, we do make some recommendations for specific actions where we have noted a particular risk

7 Illustrative

We have presented illustrative models, especially where actions could be taken in the shorter term, but as noted a number of times, these would need to be corroborated by updated data to verify their accuracy.

These are covered in detail in the following Chapters of the report:

- A. Housing Benefit and Universal Credit
- B. Options for the Warden Service
- C. Options for the Lifeline Service

8 Subsidy

We are mindful that Charnwood supports its warden service and is minded to offer some subsidy if needed. This is immensely helpful as it means that there is not the same threat hanging over potentially Housing Benefit ineligible elements of the service as some sheltered providers are experiencing. This review has aimed to identify how the service can be funded in different ways to minimise the need for subsidy.

However while we have looked at options in terms of how they be made self-sustainable, all the options have potential for requiring some subsidy from the wider Council both to make the options 'stack up' in the business sense, especially in the short term and to 'soften the blow' for current individual users.

We are respectful however that, as in all local authorities, budgets are under pressure and that we are not privy to specific wider Council budget or indeed what political priorities might be in this context.

9 Understanding the distinct but interconnected nature of the Services

We have identified that for funding purposes the following need to be seen as distinct services, even though, on the ground, they are highly inter-dependent:

Warden Service

- The Warden Service in the Sheltered Schemes, and within this the Services they provide on behalf of the Landlord
- The Warden Service in the CAS units and within this the Services they provide on behalf of the Landlord
- The Warden Support functions
- The Warden Service delivery of Lifeline functions on site
- Social activities in the communal areas
- Guest bedrooms;

Lifeline Service

- The Control Centre's monitoring function for Lifeline
- The Control Centre services to the Landlord function
- The Control Centre services to other Council services and external organisations
- The Lifeline Service marketing and installation function;

10 Next Steps

We strongly recommended that before any firm decisions the Council takes the following actions:

- Repeat of the time sheet exercise undertaken by Warden Service be repeated over a longer period and with tasks broken down more specifically
- That a similar exercise is undertaken for Lifeline staff
- That in-detail discussions are held with the Housing Benefit Service to Charnwood, and that a good mutual understanding and working relationship be developed and any advice from them provided in writing
- That the impact on, and preferences of actual and potential end-users are sought
- That a real-cost income budget is constructed for each service with clear formulae being applied so that any further modelling on options is based on sound financial footings
- Business impact and risk assessments are undertaken on the relevant areas of Charnwood's wider business before any option goes ahead

SITRA can provide support with all of these activities if Charnwood would like to develop these ideas. We now have a rich bank of information and knowledge and now that Charnwood's Senior Team and Members have clarity as to the options available to them, it would be reasonably straightforward to build on the favoured options to reach conclusions with greater certainty given the benefit of more time.

D: METHODOLOGY

We have based on findings on information provided by Project Board staff, desk top and telephone research, observation on observations of how some staff work and our own experience and knowledge.

This Options Report is supplemented by:

- A Position Statement which draws together key information about the Lifeline and Warden Service as they are delivered currently, in Charnwood and it is recommended that this kept up to date to ensure sound decisions are made going forward; this position statement should be used as a reference point for a number of areas addressed in this report
- A 'Telecare Practice Elsewhere' report which illustrates the wide variations that can be applied to a Lifeline Service and a description of how Telecare works in practice.

For the most part we have taken a cautious view.

For example, it was beyond the scope of the review to assess;

- The impact of the service on end-users or Charnwood as a whole
- The quality of the services in any detail
- The impact of the services on the wider Council or on the district as a whole, or on the wider health and social care agenda
- Or to consult on the views of tenants/service users

The timescale for the breadth of the task we have undertaken has been short. **We have had to use information, such as short time sheet recording exercises, and make some in principle-assumptions which mean that any figures presented that apply to Charnwood District specifically can only be illustrative and not actual.** However these can be built with relative ease on as a second stage piece of work given more time and up to date data.

The important issues for Charnwood Council's Senior Team and Members to take away from this report is the knowledge of the options available and to form an initial view of which options they wish to see worked up in greater detail and which do not meet their needs.

What this report is able to demonstrate is that Charnwood does have options for both the sheltered service and Lifeline; some of these can be implemented in the short term, whilst others take a longer term investment approach

E: BRIEF SUMMARY OF FINDINGS

This summary of the full report follows the format of the main report, addressing (1) Housing Benefit; (2) Warden Services and (3) Lifeline Options.

The subsequent Chapters 1, 2 & 3 provide a full overview of the review, the finding, the options, and where relevant any key recommendations of each of these 3 sections.

E1 Housing Benefit – Summary

We have been especially cautious in the advice we have given to ensure that any decisions the Council are based on a strong footing. However, the interpretation of Housing Benefit regulations is not an exact science. Our key principle has been whether the decisions of the Council and its Housing Benefit Service will satisfy not only the immediate Housing Benefit Team, but also pass Audit.

Looking at the wider issue of Housing Benefit eligibility of these services our investigations show that it should be possible to recoup some of the loss of Supporting People funding for the Warden Service provided to people in both Sheltered Housing and CAS properties, for those who receive this benefit. We are aware that a small amount (e.g. £1.74 in Sheltered Housing) is already allocated against this type of Housing Benefit eligible heading. We believe there may be scope to review this percentage of what might be considered an eligible service charge and we hope our options build on this in both the current service model but more especially with a revised warden role.

We have taken a cautious view (by comparison with the approach of some authorities) to the moving of a larger element of a re-drawn sheltered officer role into a service charge. Some sheltered services providers have had significant percentages of the job role agreed as Housing Benefit eligible by their local team and whilst this may be developed with the Housing benefit team, this report does not make assumptions about the possible outcomes of those discussions.

Housing Benefit and Universal Credit implications for Lifeline

Housing Benefit Regulations currently state that “charges in respect of the provision of an emergency alarm system” are ineligible. Lifeline would therefore appear to be un-fundable, but Charnwood Council should consider this in light of two things-the first being that probably 30% and possibly up to 50% of the Lifeline activity appears to be housing/property related and secondly that in some areas, different conclusions have been reached by Housing Benefit Services with regard to some landlord functions performed by the Lifeline. This is an area to explore with the Council’s Housing Benefit team.

Housing Benefit entitlement

Information provided suggests that 75% of people in sheltered housing and 73% of those in the CAS properties respectively, receive at least some Housing Benefit.

However, national data suggests claimant levels for this age group to be as high as 84% - 90%¹. We therefore recommend an intensive benefits assessment campaign in any event, but most especially if changes to the eligible Housing Benefit in the rent and service charge are implemented.

Tenancy Agreement

For Housing Benefit to apply, a service charge must be legally enforceable and also that “payment of which is a condition on which the right to occupy the dwelling depends”. We recommend that the Council reviews its Tenancy Agreement for sheltered (and possibly also the CAS units) to be sure the Agreement demonstrates that requirement.

Universal Credit

Going forward, because Universal Credit applies to people of ‘working’ age, any impact on sheltered services will be minimal. However, this may change if eligibility criteria for hard-wired schemes changes.

However, the Government currently intends at some stage in the future (no date has been given), to replace Housing Benefit for older people with a housing credit, administered as part of Pension Credit. There are no details about this though it might be reasonable to assume that the rules would be very similar to those to Universal Credit in relation to service charges.

E2 The Warden Service-Sheltered and CAS – Summary

The Warden Service timesheet study corroborates the Council’s Warden Service element of £1.74 in its rent for Sheltered Housing that covers approximately 22% of their activity which is landlord –related.

This is we believe less true for the charge for Warden Service’s landlord element in the CAS properties. In fact, our findings suggest that very little of the Warden Service to CAS units is currently Housing/Property related. The knock on effect of this is to increase the percentage of the warden’s time that is spent in the sheltered schemes. This means that the work breakdown of the wardens would benefit from greater scrutiny to understand in greater detail the nature of the tasks they undertake and the split of their time between the sheltered schemes and the CAS units.

As importantly however, we have also offered alternative to the shifting of a large percentage of the warden’s role into a service charge. This is based on our analysis of the current role, which appears to show a significant element of housing and property-related work is already undertaken by the Warden Service and as such, would justifiably sit in the rent (and in part service charges) providing the opportunity to fund this either through an increase in rent or using HRA funds (as opposed to GRA). A key task once decisions have been made on a direction of travel would be to clarify some of these findings in the job descriptions of staff.

Summary of Warden Service Options: Summary

Sheltered Housing

The following is a summary of the suggestions which could be considered individually and could therefore be said to constitute options for individual decisions.

- Re-calculate the Warden Service Charge so it reflects the proportion of time spent on property-related HB-eligible activities in Sheltered specifically (after revised time-sheeting exercise) and taking into account all relevant on-costs
- Make changes to current Warden job-role including removing the requirement to undertake support planning and varying the requirement to undertake weekly visits. This could reduce that Warden time required by the equivalent of 1 WTE Warden, and will affect the *proportion* of Warden time that is viewed as HB-eligible
- Transfer the responsibility for organising and expanding social activities in line with *Ageing Well* strategy through creation of half-time dedicated post from within the overall pool of Wardens to be funded out of General Fund. The alternative would be to make this subject to a Personal Charge to residents.
- Ensure that the cost of using the Guest Room includes the cost of the warden's time spent in managing this facility. The alternative would be to make a Personal Charge to all residents on the basis that they all have access to this facility
- Fund the balance of tenancy-related housing management activity out of the core rent and therefore the HRA. Explore the possibility on new lets at least of increasing the core rent element to in line with target-rent setting rules for sheltered and supported housing. The alternative would be to attempt to fund tenancy-related housing management through further increases to the HB-eligible service charges, but we think this could be difficult to sustain within HB regulations
- Calculate the residual element of the warden's time not already funded and make a Personal Charge to cover this (only after the revised time-sheeting exercise and other decisions above have been made). If all the above suggestions are followed then this residual charge should be relatively small

CAS Units

- Reflect the reduced level of work due to the reduction in numbers of CAS tenants being supported. Consider the possibility of introducing a new level of service and transfer some tenants who receive monthly visits to some that will receive 3-monthly visits (all based on genuine assessment of need) Altogether we think this might translate into a reduction of 1.75 wte staff
- Re-calculate the Warden Service Charge so it reflects the proportion of time spent on property-related HB-eligible activities in CAS units specifically (after revised time-sheeting exercise) and taking into account all relevant on-costs

- Fund the balance of tenancy-related housing management activity out of the core rent and therefore the HRA. Explore the possibility on new lets at least of increasing the core rent element to in line with target-rent setting rules for sheltered and supported housing. The alternative would be to attempt to fund tenancy-related housing management through further increases to the HB-eligible service charges, but we think this could be difficult to sustain within HB regulations
- Introduce the notion of 3-monthly property visits and define in such a way that it is HB-eligible as a service charge
- Calculate the residual element of the warden's time not already funded and make a Personal Charge to cover this (only after the revised time-sheeting exercise and other decisions above have been made), or fund through a combination of a Personal Charge and contribution from General Fund. Suggest that if a combination approach is applied the Personal Charge is calculated on the costs of a basic monthly visit and the General Fund picks up the tab for the cost of intensity above this. If all the above suggestions are followed then this residual charge will still be much higher than in Sheltered. Alternative is to fund the whole service through the HRA as in Tenancy Support or to restrict service to the 3-monthly property checks

Other considerations

Tenure-Free Real-Cost Support Service

An additional Option is to consider a Tenure-Free Real-Cost Support Service. This would support the people in the 'middle ground between care assistants and social workers. Although often presented as an additional service offered by Lifeline Services, (because a community alarm system could be key to the emergency call out option often included in this service.) it is often delivered by warden-type staff. It could be provided even where community alarm monitoring is outsourced.

Examples covered in the Telecare Examples of Practice Elsewhere include Redditch's Home Support Service and South Cambridgeshire's Lifeline Plus – as well as a number of others.

Tenant involvement in delivery of the service

In this option, tenants or even other volunteers help deliver aspects of the service including for example organising social activities but this option needs careful consideration.

Stock transfer

A more radical option has been considered which would to change the transfer the Sheltered Housing stock to a Housing Association. This would enable 'exempt accommodation' and/or 'specified accommodation' Housing Benefit rules apply. In effect, this would enable different Housing Benefit regulations to be applied. We recognise that this option may not appeal to the Council, so no further work on this has been presented in this report.

E3 Lifeline Service Options - Summary

Control Centre

Our analysis of the viable options available to Charnwood Council comprise four options to 'retain the in-house Control Centre' and three options to 'discontinue the in-house Control Centre'.

In the retention options there would need to be concerted efforts to increase its income sources through, for example:

- Developing and charging for its Out-of-hours and other services;
- Promotion of the Lone Worker service and ultimately
- Merging with other 24/7 services.

The discontinue options include:

- Encouraging service users to join the new County Tunstall contract arrangements
- Transferring the monitoring service to an outsourced-by-choice local Control Centre
- Ceasing the service as a whole and suggesting service users contract individually with other providers

Marketing and installation Service

In addition, to the Control Centre options in the table below, the 'Lifeline Installation and Marketing Service' could be retained in all but options 4 (Tunstall) and 6 (customer self-contracting)

It would have an ambition to achieve 3,000 customers in the medium term. To achieve this, a real-cost charge would be developed and eligibility criteria drawn up. New protocols and training would be key factors in this.

In all 'retain in-house' options (and option 5) the assumptions are that:

1. the following services which are currently free would cease or become paid for and real charges service options:
 - Out -of-Hours Emergency Call Out
 - Key Safes
 - Second Pendants
2. Other add-on, paid –for, real-cost services would be further developed:
 - Telecare sensors
 - Tenure Free Real-Cost Support service (possibly in conjunction with the Warden Service and/or the voluntary sector); this could include an emergency Responder services and other 'support' functions.

Conclusion

It can be seen that the Council does have a wide range of options. However, before any of them are taken forward there must be detailed work to flesh out assumptions and provide fully developed proposals which have a clear understanding of risk and impact.

The options set out in table form can be found below

Control Centre Options

Illustrative.	- Indicates retaining in-house options	Unless otherwise stated the calculations based on 2,000 service users and a loss of 500 service users in hardwired schemes						
Option	Description	Risk to Service user	Risk To organisation	Timescale	Charges to tenants in hard wired (48 weeks)	Charges to users in sectors (52 weeks)	Income generated by charges and assuming no subsidy	
Option 1A: 'Community Lifeline Service'	Retain an in-house service Drive down costs and increase customer base	Low	Medium	Short Term	£3.23	£2.98 plus VAT (£3.58)**	£287k	
Option 1B: 24/7 hub	Retain in-house service Merge Control Centre with other 24/7 functions	Low	Medium	Medium Term	£2.08	£1.92 plus (£2.31)***	£200k	
Option 2: Invest Option	Retain in-house service Invest in technology based on need identified by Partners and service users	Low	Medium	Medium term	N/A	N/A	N/A	
Option 3: Offer service it for free	Retain in-house service Offer service free-of-charge to tenants in hard-wired provision	Low	High	Short Term	£0	N/A	N/A	
Option 4: Wholesale Transfer to Tunstall	Withdraw from provision of Lifeline Recommending all service users transfer to County Telecare Contract	High	Currently Medium - High	Short Term	£3.78 plus VAT (£4.54)****	£3.78 plus VAT (£4.54)	£0	
Option 5: Outsourcing by choice	Withdraw from direct provision of Lifeline Contract for monitoring service from another Control Centre elsewhere	Medium	Low	Short Term	N/A	£4.40 plus VAT *****	N/A	
Option:6 Customer self contracting:	Advise customer the service is ceasing and ask them to make their own arrangements	High	Low	Short Term	£2.50 - £4.60 plus VAT	££2.50 - £4.60 plus VAT	£0	

On the risk analysis Options 3, 4 and 6 could be seen to offer more risk than Options 1A, 1B and 5.

** may need to increase to compensate for charges to hard-wired schemes *** will need to be recalculated if double staffing required

**** Possibly £6.19 if smoke sensor ***** estimate based on charges in Leicestershire.

Chapter One

The Impact of Benefits Meeting the cost of the Warden Service through the benefits system

Summary

Our investigations show that some of the warden services provided to people in both sheltered housing units and (but to a lesser degree) the community alarm properties could form a modest service charge met by Housing Benefit (HB) for those who receive this benefit. We have taken a cautious approach at this stage with regard to this calculation; this approach can be built on as more detailed information is gathered, but we believe this to be the sound way forward if the Council wishes to consider the option of moving some costs to HB eligible service charges.

This opportunity should be considered alongside the other proposals within this report for covering some of this lost income, as they can be adopted separately or alongside each other.

Housing Benefit Legislation

The legal position for Housing Benefit is that a service charge must be legally enforceable and also that “payment of which is a condition on which the right to occupy the dwelling depends”². This means that if people have the right to opt out of paying a service charge, HB cannot meet the cost of a service charge to anyone who opts in, unless there is a variation to tenancies to justify the additional charge on a case-by-case basis.

The legislation specifies various service charges which are not eligible to be met by HB. Our analysis of the current arrangements in Charnwood Borough Council shows that generally these are already being applied appropriately – for example, the provision of laundry equipment, heating in communal areas and cleaning of communal areas, are eligible service charges or would be if they were not separately identified from the rent payable for the properties.

It is quite common for landlords to levy a separate service charge for grounds maintenance. Charnwood Borough Council has included the cost of these services in the calculation of the overall rent rather than as a specific service charge. Either way, the cost of this is being met by HB when tenants receive HB.

A number of charges associated with the needs of individual tenants are specifically disallowed and cannot be met by HB – for example, counselling, medical treatment, the provision of an emergency alarm system, nursing care, personal care (including assistance at mealtimes, personal appearance or hygiene) general counselling or any other support services. Essentially, purely personal services.

² Regulation 12 (1) (e) The Housing Benefit Regulations 2006 and regulation 12 (1) (e) The Housing Benefit (Persons who have attained the qualifying age for state pension credit) Regulations 2006.

However, there is a major exception which is that all services which are “connected with the provision of adequate accommodation” are eligible to be met by HB³.

Case Law

There has been considerable case law on this and the legal position is currently fairly settled and summarised in DWP guidance to local authority Housing Benefit services⁴. Essentially “adequate accommodation” means the fabric of the building: “Charges for any service not connected with the provision of adequate accommodation are not eligible for HB. This includes services which make it possible for the tenant to occupy the accommodation but which have no bearing on the adequacy, this is the fabric, of the accommodation. The accommodation must be adequate as accommodation in general, not just with regard to the particular tenant.”⁵

When considering whether a service is connected with the provision of adequate accommodation, the personal needs of residents can be relevant⁶, though there is not clear dividing line between some “eligible” and “ineligible” service charges.

Provided that a service is “connected with the provision of adequate accommodation” and provided that a legally enforceable charge is made for the service as one of the conditions of occupying the property, the cost of that service should be met by HB.

The provision of adequate accommodation includes ensuring the suitability, safety, usage and access to a safe, decent home.

In practice, this means that HB services around the country will usually allow HB towards the cost of staff time involved in activities such as, reporting repairs, arranging repairs and maintenance, carrying out health and safety inspections, inspecting the building and checking that residents have not damaged or misused the property or equipment.

Eligible Services

Examination of an in-house analysis carried out by Charnwood Borough Council suggests that currently 22% of warden time is spent on activities which would constitute an “eligible service charge” for HB. In practice this would mean that if tenants had to pay a service charge equating to this proportion of warden time, if they do receive any HB, the increase in the service charge would simply translate into an identical increase in the Housing Benefit they receive.

³ Para 1 (g) of Schedule 1 to The Housing Benefit Regulations 2006 and Para (1) (e) of Schedule 1 to The Housing Benefit (Persons who have attained the qualifying age for state pension credit) Regulations 2006

⁴ DWP Housing Benefit Guidance Manual para A4.730.

⁵ DWP Housing Benefit Guidance Manual para A4.720. and CIS/1460/95.

⁶ CIS/1460/95.

Therefore, as a starting point, it is possible to identify 22% as a service charge levied and made legally enforceable as part of conditions of occupation of premises for the equivalent of 22% of the costs of the warden service. In calculating that 22%, we have apportioned the element of eligible service charge time to “overhead” activities and time such as sickness, travel, management time and training. This is on the basis that 22% of such time would be fairly attributable to dealing with adequate accommodation issues (N.B.as addressed elsewhere this has not taken account of the voids and so may be an underestimate). To date, because the warden costs were being met by Supporting People monies, this is a new cost which now falls on the Housing Revenue account and it is legitimate to consider funding at least some of it via HB and a service charge.

The extent to which these duties identically reflect the ‘enhanced housing management’ charge introduced into the rent and service charges a few years ago, needs to be confirmed.

It is also however felt that this element of the wardens’ workload should be further interrogated as it may be possible to increase the percentage and total amount that might accurately be identified as a service charge and one which is eligible for Housing Benefit, to replace some of the lost Supporting People funding.

Clearly, a number of the tasks and activities undertaken by wardens would not be eligible – for example, purely social contact with tenants, arranging social activities, support panning liaising with health and social care agencies and visiting tenants in hospital; however, a more in-depth analysis may show that some of these tasks include at least an element of activity which is connected with the provision of adequate accommodation.

This remains a starting point for a number of reasons;

- Firstly the calculation to arrive at this amount can be improved by more accurate application of the total cost of the warden service-taking total cost rather than just the salary cost; whilst this does not change the percentage, it may increase the sum collectable
- The second is to re-assess the task breakdown of the wardens job currently as we believe this may reveal a higher percentage of property related activity
- Thirdly, building on this, the role of the warden can be redefined with a legitimately greater percentage of their role focussing on housing and property related tasks and this is covered in other sections-see below.

Finally a more accurate distribution of the cost should be applied, reflecting that the majority of these duties should be applied to the sheltered units, where the Warden carries out a range of building related duties, but which are not relevant to the CAS units. This is addressed in Chapter 2 where the role of the warden and the costs are examined in more detail

A further option for the Warden Service

Developing bullet point 3 above, the Council may wish to consider restructuring the Warden Service and change job descriptions to increase the percentage of their role and time devoted to services connected with the provision of adequate

accommodation - perhaps making up to half the warden's duties, which would consequently double the weekly service charge. Areas where this might legitimately be considered are areas to do with the security of the building, which is an eligible charge and is part of the warden's role. This has been done in a number of areas and we attach an example of one such job description (Appendix 2).

Clearly, this raises human resource and change management issues and would not be a short-term solution.

Finally, it is of course axiomatic, that the process of introducing any service charge needs to be carefully managed and consulted upon with legal advisers, tenants and other key stakeholders and a critical element of this is to work in conjunction with your Housing Benefit team as their wider ownership of the eligibility of the charge will ease any transition.

HB claimants

We understand from Charnwood Borough Council that 75% of people in sheltered housing and 73% of those in the community alarm properties respectively, receive at least some HB.

While benefit take-up rates are no longer published by the Department for Work and Pensions, we know that the last published take-up rate for HB payable to pensioners was in the range of 84% - 90%⁷. It is very likely that this rate still applies today.

This would suggest that some of the tenants who are currently not receiving HB would qualify. Furthermore, the complex nature of the U.K.'s means-tested benefits system means that, for example, if people are awarded benefits such as Attendance Allowance, Disability Living Allowance, or Personal Independence Payment, it may passport them on to means-tested benefits if their income is otherwise too high. Therefore, a further group of those not claiming, (in addition to those who would qualify anyway but haven't claimed), may qualify for HB if they were given help, support and assistance to claim a range of additional benefits.

Mitigating any additional costs for Service Users

Clearly, one would wish to avoid additional financial strain on those people who do not currently receive HB. Therefore, should the service charge or increase in rents options be pursued, to ameliorate this, we recommend that work be undertaken to offer advice and casework assistance to people not receiving Housing Benefit in order to check whether they qualify for any unclaimed benefits, help with the process of claiming those benefits, supporting them through the process of the claim and helping them to challenge any negative decisions on entitlement which are felt to be incorrect.

⁷ DWP: Estimates of take-up of income-related benefits for Great Britain for the financial year 2009 to 2010.

We have reviewed the job description of the council's Financial Inclusion Officers and it is not sufficiently clear from the job descriptions that the role would extend to doing the above type of work, (and which one would usually expect to see being done by financial inclusion staff). This would leave various options such as changing job descriptions, deploying existing financial inclusion staff or establishing a two-year fixed term contract for someone to undertake this work. This is an area for further exploration.

There are currently 383 Warden Service users not receiving HB. Assuming that 80% would want to have a benefits check, on the basis of five intensive checks and elements of casework three days per week, all the non-claimers could be screened and assisted over a period of 21 weeks if the work was done by one officer and half that time if two were dedicated to this work on a short term basis.

The estimate of five cases per day three days per week is to allow for travel time, dealing with correspondence about benefit claims, following up claims, all of which can be considerable.

Looking to the future – Universal Credit

Universal Credit (UC) is a new benefit which is slowly being rolled out by the Department for Work and Pensions. It will combine all current means-tested benefits (except Council Tax Support). UC only applies to those of "working age". Therefore 86% and 94% of tenants in the community alarm and sheltered housing schemes respectively will not be affected. However, the younger residents in supported housing are likely to be particularly vulnerable individuals with long term health and/or disability issues as are couples where one is under Pension Credit age.

In addition, the government currently intends at some stage in the future (no date has been given) to replace HB for older people with a housing credit administered as part of Pension Credit. We have no details about this though it might be reasonable to assume that the rules would be very similar to those to UC when it comes to service charges (we discuss this further on).

In addition, over the next few years a number of changes will gradually affect some tenants – the introduction of the flat rate pension from April 2016 for new claims will lift some people above Pension Credit level, (and so reduce their HB entitlement), and the age at which people qualify for both Retirement Pension and Pension Credit (and this the housing credit) will gradually rise to age 66 by 2020 (and then to 67 by 2028). Couples where one is aged less than Pension Credit age will have to claim UC when it is eventually rolled out.

Eligibility

It is extremely difficult to provide any certainty about entitlement to UC because the rollout of this new benefit has been beset with difficulties and there has been very considerable project slippage. Currently, just 52,620 people receive this benefit, (1% of means-tested benefit claimants), the vast majority of whom are single unemployed

people living without housing costs in certain areas and who do not have health or disability benefit entitlement.

It remains to be seen whether people with long-term health problems will be included in any early rollout of UC. People receiving existing means-tested benefit will receive transitional protection if their entitlement to UC is less than their existing entitlement at the point of change. This operates by paying an additional amount of UC to the same level of “old benefit” until their UC entitlement catches up (for example, by annual increases).

Furthermore, because UC is to be administered by the DWP, it is also not clear how flexible they will be in their interpretation of the rules. The DWP has moved away from locally administered benefits, which makes it difficult to resolve problems, to build local contacts and delays appear to be widespread.

Universal Credit – differences to Housing Benefit

As regards service charges and UC, the rules are slightly different to HB.

First, the service charge must be towards the provision of services or facilities for the use of benefit of people occupying accommodation or fairly attributable to the cost of all charges for providing such services or facilities. Like HB, the service charges must not be optional and they must also be a condition on which the right to occupy accommodation depends. .

Under UC, the following service charges would be eligible to be met by Universal Credit (and we assume housing credit for Pension Credit, though we cannot be sure in to any extent).

Eligible service charges for UC are:

- a) The external cleaning of windows only for upper floors of a multi-storey building.
- b) Other internal or external maintenance or repair of the accommodation but only where the payments are separately identifiable as relating to such maintenance or repair.
- c) Payments for the general upkeep of communal areas including the supply of water, fuel or any other commodity for communal areas of common use.
- d) Maintenance, cleaning or repair for all persons living in accommodation (such as refuse collection, communal lifts, secure building access wireless or television aerials,
- e) Payments for the use of essential items such as furniture or domestic appliances. ⁸

It is particularly noticeable that the provision for a service charge being eligible if it is in connection with the provision of adequate accommodation, does not exist in UC. However, it appears that the 22% of warden time might still be eligible under UC as it

⁸ Paragraphs 7 and 8, Schedule 1 The Universal Credit Regulations 2013.

concerns issues of repair and maintenance/upkeep of the fabric of the buildings. However, we cannot state this with any degree of certainty.

It is our view, that when drafting the legislation, the DWP has not been fully aware of the range of service charges currently met by HB and the importance of these for landlords, local authorities and tenants alike. It may that the legislation has to be amended to take account of the reality on the ground when it is finally implemented.

Payment of Universal Credit

UC will also be paid monthly in arrears, with payment direct to recipients being the default process. Rates payable to many severely disabled people living alone, (those entitled to severe disability premium), are likely to be less than what they currently receive.

Action Needed on UC Implementation

If and when UC is rolled out to tenants in the affected schemes in Charnwood, it would be prudent to review the service charge not only for warden services but across all services to all tenants.

Charnwood Borough Council will have to review the position, if and when UC and the proposed housing credit are eventually extended to people living in their accommodation (including those living in the general stock).

Tenancy Agreement

We were concerned that the Council's standard tenancy agreement does not break down the cost of service charges. People are simply given an overall rent figure.

While this does simplify matters, it causes a number of potential legal difficulties and is not wholly transparent. It can also cause difficulties when people find that their full rent is not met because unbeknown to them, it includes an ineligible service charge.

We therefore recommend that the council considers rewording the standard tenancy agreement so that as well as the overall weekly rent, there is an explanation and breakdown about service charges and how much people are liable for in respect of these and additionally setting out clearly which ones they would have to pay even if they received maximum HB.

Housing Benefit and the Lifeline Service

The evidence we have seen indicates that some of the issues dealt with by the Lifeline service are not connected with the provision of adequate accommodation and so would not be eligible to be met by HB as part of a service charge.

However, we understand that a significant part of the time spent on calls to Lifeline involves dealing with out-of-hours repairs and property related issues. This would clearly be eligible, whether included as a service charge or as part of the core rent.

The Council would need to obtain evidence to quantify the amount of time involved in this and the costs of providing it, but we believe there are grounds for this to be eligible for Housing Benefit and should be explored with the Housing Benefit team. This is covered in greater detail in the Lifeline section of this report.

A more radical and longer option to explore – transfer of stock

Properties which provide care, support or supervision where the landlord is a voluntary body, a registered charity, a housing association or a county council are exempted from the usual restrictions on how much HB can be paid towards rent in the private sector.

This is known as “exempt accommodation”. It enables the full cost of supported housing to be met. One criteria is that if supervision or care are not provided, additional support over and above ordinary household management should be available to tenants and to be a service they are likely to use.

There is also a category of accommodation known as “Specified Accommodation” where care, support or supervision need not be provided by the landlord.

A longer-term option may be to consider transferring the sheltered housing units to a registered housing association (a “Registered Provider”) and to develop extra care schemes targeted at frailer older people. The planning of this would need to be done in partnership with Leicestershire County Council’s adult care services and the NHS to ensure a strategic fit.

Higher levels of HB subsidy are paid when the landlord is a Registered Provider and both Exempt Accommodation and Specified Accommodation housing costs are outside the UC scheme and not subject to monthly payment (though full details are currently not known).

Below is the task breakdown of Warden Service time:

Analysis of time spent by wardens													
	Bev	Christine	Tracey	Adrian	Liam	Suzanne	Anne	Karen A	Total Mobiles	Sharon	Lynn	Karen	Total all
Tenant repairs	2.50	2.25	4.25	9.25	2	2.5	4.5	3		4.25	1	1.5	37.00
H&S Checks	0.50	2.5	9	9	9	5	5	7		8.25	3.75	8.5	67.50
Communal repairs	1.50	5	7.5	10.75	5.5	3	5	4		6	0.75	4.25	53.25
Equipment checks	4.50	7.75	8	5.75	4	7	4.5	4.75		10	9	6.5	71.75
Rent issues	0.75	2.75	5.5	2	5	0.5	3.5	1.5		1.25	0.5	1.5	24.75
Grounds maintenance	1.00	0	1.25	5	1	0.25	1	0.5		0.5	0.25	0.5	11.25
Property access	0.00	0	3	0.5	5	0	2	1.25		0		0	11.75
Travel	5.50	2	5.5	8.75	9	11.25	13	10.5		16	13.5	11	106.00
Staff supervision	0.00	0.75	1.75	2.25	1.5	2	1.5	2		5.5	0	1.5	16.50
HR issues	1.00	0	4.5	2.25	5	3	2	2		6	4.5	6.5	36.75
Training	7.50	0	0	0	0	7.5	0	7		9.5	0	7.5	39.00
Performance management										9.5	9.5	10	29.00
Staff management										4.5	1.5	2.25	8.25
Annual leave	18.00	74	9.5	37	0	20	25	0		2.5	37	7.5	230.50
Other	1.00	0.5	0	2	1	2.5	0.5	0		2	0	0	9.50
Support plans	12.50	7	8.25	4.5	18	11	13.5	10.5		6	2	15.25	108.50
Welfare visits	82.50	24.75	59	37	62	51.75	50	57		40	48.5	50.25	562.75
Involvement agencies	3.25	5	10	5.25	2.5	5	6	6.75		2	1	1.5	48.25
Court activities	6.00	10	3.75	1.5	13	10.5	10	26		2.5	9.5	9	101.75
New tenant visits	0.00	1	0.75	2	0	1.5	1	1		3.75	5	2	18.00
Court management	0.00	1	4	3.5	2.5	3	0	2.5		5.5	0.75	0.5	23.25
ASB	0.00	1.75	2.5	2	2	0.75	0	0.75		2.5	0	0.5	12.75
												Total	1,628.00
HB eligible:													
Rows 1-7	277.25 Hrs												
as % of total:	17.03%												
Percentage of leave, sickness, training, management time which is HB eligible													
	17.03%	80.98 Hrs											
Total hours eligible for HB	358.23												
% of total	22.00%												

CHAPTER 2:

Warden Service: Outline of Findings & Recommendations

1. Overview

This review examined the role of the warden in the sheltered and the community (CAS) units to understand the role of the warden, the split of their duties in relation to the split between the housing and support roles that they undertake. The review offers a number of options available to Charnwood in considering the future of the role and the options for funding this.

The sheltered housing and community accommodation (CAS) services have traditionally been treated as a single service; however upon closer interrogation they appear to be quite distinct. As such we believe each should be analysed separately in terms of future development and funding.

1.1 Sheltered Housing / Community Alarms Schemes

In relation to sheltered housing, an analysis of the Warden Service role suggests that in fact this role currently includes a significant element of housing management and the delivery of accommodation-related services. We would suggest a few changes in practice to make this clearer and easier to substantiate. This includes dropping the requirement to work on support planning, which was essential under the Supporting People regime but always a bit forced in the sheltered housing setting. We do not think that this would have significant impact on the quality of the service offered.

It is far harder to make this case in relation to supported housing because of the lack of communal facilities to manage and the nature of the visits currently undertaken. We believe that in this area of their work the warden predominantly is providing support, but with a residual housing management role. This separation for the purposes of analysis does **not** imply that the services need to be operationally separated, but it does have profound implications for the way in which the funding of the services has to be calculated and the split of costs, and for these reasons we treat them separately here.

1.2 Tenancy Agreement

It is important to note that any service charge is only payable if it is a condition of occupying the dwelling and will need to be set out as such in the tenancy agreement. We do not think that the current Agreement does make this sufficiently clear. Tenancy agreements may therefore need to be changed to reflect this within the agreement.

1.3 Figures presented here are illustrative

It is important firstly to say that our conclusions here are based on an in-depth case study on the work of one warden, taking a typical working pattern and considering the needs of the tenants she “supports”. This risks being unrepresentative of the service as a whole and we recommend that more detailed study and analysis takes

place to breakdown the wardens task and roles and that further work be carried out on identifying the actual needs of tenants currently supported before definite decisions are taken.

Secondly we make use of a time-sheeting exercise undertaken by the Wardens Service some time ago and have drawn broad conclusions around a percentage of the tasks that fall within a possible service charge eligibility. The most important thing to note however, is that this currently does not distinguish between time spent in sheltered as opposed to time spent in supported (CAS) housing. The breakdown of how time is spent is also currently not sufficiently aligned with a clear rationale for apportioning time to the different types of charges. It is however sufficient to give comfort that some charges are likely to be eligible to be treated as a service charge, but would need to be repeated using a better aligned set of headings.

1.4 Important Role of the Warden Service

We are struck by the key preventative role that the Warden Service fulfils for vulnerable people in the community. The beauty of the sheltered model in particular is that because the Warden is in regular contact with tenants in the course of their normal housing duties this means that they are able to notice small changes in people's routine or demeanour that can indicate early stages of possible problems and notify others accordingly.

They are thus acting as the eyes and the ears of the community in relation to vulnerable people but this does not need to involve them in any significant additional time that would be classified as support. As such therefore we think that the warden service is a key element of the "housing contribution to health" and if the service was lost this would be an enormous loss to the community. It feels like the Warden Service has historically been undersold.

1.5 Links with Lifeline

Although we have examined the Warden and Lifeline services separately it is important to note that the warden service would be weakened without the current level of integration with Charnwood-controlled alarm service. So in considering the options set out here it is important to be mindful of the other part of the review as well.

1.6 Staffing Levels

A number of options have been presented the report. Whichever option is pursued for the future of the Warden Service it is likely that less time is required to deliver the service. This is for a number of reasons – partly because the significant contraction in numbers of supported housing tenants has not been matched by a reduction in resources, and partly because efficiencies could be introduced. Overall we have identified that the extent of this contraction is the equivalent of 3.25 full-time posts (although 0.5wte involves shifting responsibilities to a new post funded out of the General Fund).

1.7 *Linkages with other services*

In all options the prevention potential is only likely to be fulfilled if there are good working relationships with key care and support agencies such as the Homecare Assessment and Reablement Team (HART) team. Our impression is that this is not always currently the case.

It is also important to recognise that there is a new and emerging pattern of service provision for supporting vulnerable people in the community and the Council has an important contribution to make to this, but they need to make sure that their contribution is acknowledged and understood.

Of particular significance is the new Lightbulb Project, which, to some extent, is the successor project to the Supporting People funded Warden Service. While it is an important development it should not be seen as replacing what the Warden Service has to offer. However, it does offer the opportunity for an effective working relationship that will enhance Council's effective delivery of its landlord role.

2. Main Options

2.1 Sheltered Housing

Our proposals are based on the assumption that the Council is committed to retaining its warden managed sheltered housing. We therefore set out below suggestions as to how the service could be funded after the withdrawal of Supporting People funds.

2.1.1 Landlord Function

The Warden's role in relation to sheltered housing contains a significant element of housing management and the delivery of accommodation-related services. However, going forward this would be particularly reinforced by the following changes:

- A removal of the requirement to undertake and update support plans, although this would put greater emphasis on maintaining meticulous contact notes
- Re-designating "welfare visits" as "safety visits" to reflect their main focus in sheltered housing. This could be accompanied by a subtle shift in the requirement from a minimum of a "weekly visit" to a minimum of a "weekly contact". Sometimes the more formal "visit" appears to be mostly motivated by the need to update the support plan. Wardens are in contact with tenants frequently in their daily activities and do not necessarily need to formally visit if they have already seen them around the scheme. There should be some minimum timeframe however within which property visits are undertaken. This shift would need to be accurately reflected in the Wardens' patterns of work but we believe this is broadly reflective of their role currently and would not constitute a significant shift in how it works in reality

This should be reflected in a revised job description. It will also result in small but quantifiable reduction in the number of hours required. On the assumption that withdrawing the support planning requirement might reduce the amount of time required by at least 5% (but possibly more when drilled down) and the change in focus for visits might reduce the formal weekly visits at an average of 5 minutes per visit by 25%, then this would amount to a saving in time equivalent to about half a warden full-time post.

2.1.2 Some internal process changes would make it easier for the Warden Service to fulfil their role – in particular providing them with direct access to repairs teams (which will also reinforce their role as part of the ‘housing service’ and more explicit protocols with key external agencies. We feel this should be combined with more explicit marketing of sheltered housing and CAS models and consideration as to how allocation policies could ensure it is targeted at the people who would most benefit from it.

2.1.3 Landlord and Support roles split

It is important to point out that there is no data at the moment that demonstrates the split in the wardens’ time between managing the sheltered units and supporting the CAS tenants. Without this it is not possible to properly assess the cost of the service and the level of charges required.

However, for illustrative purposes we have estimated that maybe 45% of the current Warden Service time is currently spent managing the sheltered housing provision and 55% providing the service to the CAS units. Taking into account the current Warden Service budget and the reductions in staffing suggested above this would suggest a total cost of approximately £183,000 for the Warden Service in sheltered housing (this is ignoring the budget items which are already subject to service charges such as heating costs). It is however including, the appropriate share of all the recharges apportioned to the Warden Cost Centre.

2.1.4 We believe it is legitimate to fund a significant percentage of a revised sheltered Warden Service out of the rental income. To a large extent this could be by the introduction of new or revised accommodation-related service charges that should be HB-eligible, but additionally this could also involve some costs legitimately being borne by the HRA as they come under the general description of housing management. Deciding on the balance between the two depends on producing more attuned evidence to support the claim and is a job worth doing to accurately identify this split in duties – in particular the revised time-sheeting exercise that we have already suggested. Of particular importance would be to be able to more accurately assess the following:

- What the main purpose of the “welfare” visits are in terms of issues raised (i.e. are they all support or are they a mix of property check, safety checks and general tenancy management)
- How much of the Court activities involve meetings with tenants and how much promoting social activities

- What proportion of the time spent on equipment checks relates to the individual pull-cords as opposed to other types of equipment such as the laundry or fire prevention equipment

2.1.5 The Council clearly has the option of putting all the housing costs for the Warden Service into a new Intensive Housing Management Service Charge, as others have done, but we believe Housing Benefit officers will give it far more scrutiny if this approach is taken.

Additionally, there is a risk in any future Universal Credit/Personal Credit arrangement that service charge elements will be further restricted. We appreciate on the other hand that there are many demands on the HRA, and the core rent level is determined by the target rent-setting formula. However the potential for using the up to 10% premium' on core rents for supported and sheltered housing should be explored. This may, at least be an option for new lets even if it is not felt possible to increase existing tenants' rents.

Housing Benefit is far from an exact science and is dependent on a significant amount of interpretation by individual Benefit Officers and Audit Officers. There is no hard and fast rule about whether something is s/c or core rent and it is therefore not always an easy decision deciding what areas of activity are eligible for rent and service charges.

In our analysis we have therefore worked on the basis of the following rule of thumb –activity related directly to the provision of a safe and secure property is service-chargeable whereas activity directly related to the tenancy is more appropriately funded through the core rent (HRA).

The following spectrum of staff activity might make this debate / discussion clearer:

1. Activity related to the provision of other accommodation-related services	E.g. facilitating the cleaning of communal areas, maintenance of laundry facilities, provision of furnishings, maintenance of fire prevention equipment etc.
2. Activity related to the maintenance of safe, secure and sound properties	E.g. inspecting property, organising and checking repairs, managing access to the property
3. Activity related to the allocation, management and enforcement of tenancies	E.g. Explaining the tenancy to new tenants, dealing with problems in paying the rent, taking possession action, enforcing the tenancy, communicating with tenants about tenancy issues
4. Activity related to ensuring tenants are able to maintain their tenancy	E.g. Helping with money-management to ensure ability to pay rent, making referrals to other services able to help tenant maintain their ability to live in the property
5. Activity related to assisting	E.g. Helping them access the full range of

tenants maintain their wider health and wellbeing	health and welfare services, find suitable employment, re-engage with their family etc.
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Category 1 above should obviously be eligible as a service charge. We believe that Category 2 also clearly meets the specified criteria that charges must be around the *provision of adequate accommodation*. Categories 3 and 4 have been included by others in service charges that have got HB agreement, but we feel that this is not entirely consistent with HB regulations and potentially could be rejected. Such activity would however we feel be treated conventionally as a “charge” on the core rent (HRA).

2.1.6 There are some problematic areas of activity from the original time-sheeting exercise that may not be fundable through the rents at all - guest rooms, time spent contacting external support agencies and social activities although it would generally be accepted that housing staff might also do the first two when working with tenants.

Guest Room

It is feasible that the management of the guest room could be made self-financing if it becomes a separately charged for service (either as a personal charge attached to the rent or a realistic charge payable by those using the facility).

Social Activities

More of an issue is the amount of time that appears to be spent on facilitating social activities. This was not the case in the case study looked at but the time-sheeting exercise indicates that this continues to take up a reasonable amount of Warden Service time in some schemes - one warden spent 17% of their total time on this (although we do know that this includes time spent on “tenants’ meetings” which could well be eligible to be funded through the HRA).

We are not suggesting this is a problem and ideally in order to ensure that sheltered housing is a truly supportive community then perhaps more of this type of activity should be promoted. It is only an issue to the extent of understanding how this might be funded. This could form an additional element of the personal service charge, or we would suggest that this role could be should be looked at separately and the notion of part-time Activities Officer funded out of the General Fund be considered. If this route is taken, the hours required to deliver the Warden Service could be reduced by 17 hours a week. Using these principles an initial analysis of the warden tasks as recorded in the time-sheeting exercise was carried out as to what could potentially be service-chargeable. We do not think that this is sufficiently robust to act on directly and a repeat of the time-sheeting exercise would enable a break-down of time related more directly to the requirements to establish an HB-eligible charges.

2.1.7 Illustrative Charges

However using that analysis, the assumptions about the split in time between the 2 services, the estimation of the potential for the reduction of time required, as well as discounting long-term voids within the sheltered stock (those properties void for over

2 years) we have made a rough and ready calculation for the sheltered flats as follows:

Charge Element	Charge per unit per week
Total Cost of Warden Service in Sheltered Housing	£9.19
Eligible Service Charge Potential	£4.78 per (i.e. an increase of £3.04 on the current warden element in the rent
HRA contribution for wider Housing Management	£2.43
GRF contribution for Social Activities	£0.93
Personal Charge	£1.05 per unit per week

It should also be remembered that this assumes full-occupancy of the available lettings. If there are voids then the lost service charge income has to be covered from elsewhere.

Whilst we have stressed that at the moment these figures are purely illustrative; it is based on a considered attempt to place costs where they belong and aims to be more sustainable than the approach taken by other Authorities. However it works on the premise that the case should satisfy the most stringent of HB scrutiny, rather than necessarily the average HB Officer, who more often than not may not necessarily apply as much scrutiny as they could. It is therefore a deliberately cautious approach and may be unnecessarily so.

We also appreciate that our initial analysis of the Warden Service activity is in fact broadly in line with the calculations that the Council has done to calculate the current Warden's Service Charge. As also noted in the Housing Benefit section we believe this can be built upon. The differences are however:

- We think that the level of service-chargeable activity is not equal across sheltered and CAS units
- We think that the recharges should be included in the calculation
- We think the number of units the costs is divided across should not include long-term voids

2.2 Supported Housing (CAS Units)

Role of the Warden Service

2.2.1 The case study would suggest that the principal focus of the Warden in relation to the Supported Units is genuinely support – combating issues of social isolation and making referral to a range of external agencies.

2.2.2 To some extent this could be altered by explicitly changing the focus of the visits – perhaps the idea of a 3-monthly visit which is essentially to check up on the safety and security of the property (encompassing the alarm pull-cord checks) would be a good one to develop and the cost of this could perhaps be seen as an HB-eligible charge. Additional visits could then be seen as principally support, unless they were in response to a property- or tenancy-related problem that had previously been identified. A definitive decision on this however would have to depend on a repeat of the time-sheets exercise already suggested.

2.2.3 As in Sheltered Housing we do not know the balance of time currently devoted to this service – but we have calculated it to be 55% taking into account possible changes that we set out below.

The situation has changed recently as there has been a significant reduction in the number of tenants opting to receive this service. Based on the case study and other information given, this would appear to amount to a reduction of around 21% in caseloads. This in itself justifies a reduction in the amount of staff time dedicated to this service and our calculation that this could be equivalent of 1.75 wardens.

We would also suggest that some of the tenants currently receiving the lowest level of support might require a lower frequency of visits than is currently the case – and that a new basic level of service in line with the already suggested 3-monthly visits could be considered if this proves to be the case. If a third of those currently receiving a monthly visit moved to this new standard then this could lead to a reduction in staff time equivalent to half a warden and a consequent reduction in the cost of this service to those units.

Based on all these assumptions we estimate that the total cost of providing this Warden Service in Supported Housing would reduce to £229,000.

2.2.4 However, this service to CAS units does appear to be fulfilling a real need and sustaining tenants' independence in the community. It would therefore be a great loss if it is withdrawn. Based on the assumption that the majority of the service is rightly categorised as support, then whatever final figures emerge through the new time-sheets exercise, the costs of this service have to be largely borne by income outside of rents or service charges-most likely either the Council General Fund or the individual tenants through a Personal Charge or some combination of both.

Tenants may not be keen to pay in some instances, but if they are to be charged then it will we think be necessary to introduce a sliding scale – relating to the intensity of the service they receive-it is clearly wrong for someone receiving a monthly visit to pay as much as someone receiving a regular weekly visit.

On the other hand differential charging would make it more complex to administer and make it more difficult to flexibly respond to need as it changes. It may be that the Council considers making the basic charge for a basic level of service something for the individual to pay and then use the General Fund to top up for periods when the frequency of visits increases. This suggestion is reflected in the calculations below.

It should be noted that where tenants are in receipt of Direct Payments for their care, these funds could be used to fund this type of service.

2.2.5 On this basis and on the assumption of a) 597 clients and b) the introduction of the 3-monthly property checks we believe that for illustrative purposes the full cost could be £7.98 per unit per week.

This could break down as follows:

Service Element	Charge per unit per week (48 weeks)
Eligible Service Charge Potential	£2.98 (i.e. an increase of £1.24 on the current warden service charge) included in the rent
HRA contribution for wider Housing Management	£0.47
Contribution from GRF to cover additional service on top of monthly visits)	£1.82
Personal Charge (to cover basic service of monthly visits)	£2.71

However, these assumptions are far less certain and heavily dependent on the argument that property checks are an eligible service. It also is highly dependent on getting the balance between sheltered and supported housing inputs right which at the moment we simply do not know (but which can be calculated with the correct timekeeping and task breakdown analysis). We would be happy to discuss this in greater detail.

2.2.6 Intensive Housing Management Service option

A further option that the Council has, is to create a wider “Intensive Housing Management Service”. This could involve the creation of a single team of wardens and the Tenancy Support Team, plus possibly Financial Inclusion Officers. The difference would be to make this service potentially available to all tenants and not linked to specific properties. It is likely this would require restricting access to this service through eligibility criteria in order to manage within the available budget, but would break the link with designated properties.

On this basis it is likely to be more acceptable to fund the bulk of the CAS service out of the HRA, if it were deemed affordable.

This could however have the implication that any service charges for the CAS service might become null and void if they cannot also be made a condition of occupying that dwelling.

Other options

2.2.7 If this is not considered affordable then the Council is faced with the choices of

- charging the cost to the tenant in full
- withdrawing this service
- limiting the service to that which is potentially eligible for Housing Benefit i.e. the 3-monthly property inspections mooted.

However the service as it currently is, or as proposed above, is meeting a genuine need across its tenants and is also the type of service that best fits with current thinking on personalised and local services. Losing it would greatly limit the Council's contribution to sustaining individuals in safe, secure homes in the community and also reduce the Council's ability to contribute to the wider health, housing and social care agenda; and once lost would be very difficult to replace.

2.2.8 Lightbulb Service

The emerging Lightbulb service offer also has implications for the way in which the Warden Service operates. As a service that aspires to operate a case management approach in relation to all property-related aspects of maintaining people's independence in the community, it will be an important referral route where a Warden notes any potential problems with the way that the tenant is managing and will potentially save them follow-up time. A very effective symbiotic relationship is potentially there to be developed.

2.2.9. The relationship between the Warden Service and the emerging local area co-ordination (LACs) strategy needs to be developed. Unfortunately while we recognise the importance of these developments we were not able to fully address them in the course of this Review.

2.3 Other options to explore

2.3.1. *Support Tenants Option*

It may be feasible to enhance the support provided to vulnerable tenants by exploring the potential of utilising "support tenants". This is a process whereby someone is given accommodation in return for taking responsibility, on a part-time, voluntary basis to act as a "good neighbour" and keep an eye out for specific identified vulnerable tenants in the locality. This may be one way to use under-utilised stock in sheltered courts to full advantage.

2.3.2 *Low level support with daily chores*

The Council should look to exploit opportunities created by the Care Act 2014 to develop low-level care services to accompany tenants, do shopping, cleaning etc.

This would potentially fill a gap that currently exists in the market as people receiving care packages are given more control over how they spend the money they are entitled to through personal budgets or are using their own private resources to purchase. This could be a way of utilising some of the resources that we are

suggesting elsewhere are surplus to requirement and would enhance the service provided without jeopardising the eligibility for housing funding. This option could either be integrated with the Warden Service or as a supplementary service to the Lifeline Service. Alternatively, it could be developed in Partnership with the Voluntary sector.

There are a number of circumstances where people in the community might well feel that this is a cost-effective way of ensuring their relatives' security and independence in the community.

A number of councils such as South Cambridgeshire District Council and Gosport District Council have developed this model. It would have the advantage of utilising experienced staff who would otherwise need to be made redundant.

3. Recommended Actions

3.1. The most important and urgent action is to repeat the time-sheeting exercise, with clearly identified headings that match HB definitions and completed separately for sheltered and supported housing. This needs to clearly identify how much time is being dedicated to each service and will need to relate the breakdown of task activity into relevant headings to support any HB claim. Only then can the above options be worked up to their full capacity and the real potential to allocate income from the various sources be fully established

3.2. An HB take-up campaign using specialist resources is required. At the moment the level of HB take-up appears to be lower than we would expect.

3.3 Undertake consultation with tenants about the issues at stake, the removed funding, what they most value about service and what they would be prepared to pay for. This seems to be crucial information to inform the ultimate decisions taken.

CHAPTER 3

Options for the Lifeline Service

3.1 Summary

At a strategic level the Council has broadly two options:

- To retain the community alarm monitoring function; – 4 variants are offered;
- To outsource the community alarm monitoring function; - 3 variants are offered;

3.2 *Underpinning issues to be considered in evaluating the future direction of Lifeline*

- A key factor in the decision in the retain/outsource debate lies, to some extent, beyond the Lifeline Service. ***Before making the fundamental decision to retain/outsource decision we would urge the Council to consider the impact that losing the Control Centre would have on any future potential to combine all its 24/7 services into a comprehensive (and potentially) more cost effective service.*** Whilst consideration of other 24/7 options was beyond the scope of this review, Option 1B – creating a 24/7 hub – briefly explores some of the issues and benefits of this approach
- The eligibility the Lifeline Service Charge for Housing Benefit should be explored further with the Council’s Housing Benefit Service. Whilst received wisdom is that Lifeline services are not eligible for Housing Benefit, our breakdown of workload suggests between 30 and 50% may actually be property/landlord related rather than personal support, which may be the basis for constructive dialogue with Housing Benefit. Additionally Sitra understands that some authorities are considering this issue in a positive light
- In considering these options it is essential to see the monitoring service and the installation/marketing as two distinct functions of the Lifeline Service. In the options identified below we have focused on options for the monitoring of community alarms and assumed that in most scenarios the installation and marketing would remain a function of the Council
- In all decisions regarding the Lifeline Service, it must be remembered that it is strongly inter-connected with the Warden Service, especially within Sheltered Housing and part of the next stage is to explore the intricacies of the impact on changes on one to the other and consequent impact on the service user
- Any decision to retain the monitoring service in-house must not be seen as a decision to continue as before
- For any of the outsourcing options there would be significant ‘exit costs’: HR, redundancy/redeployment; de- installing equipment; consulting and writing to

service users; transfer of data issues; and in those options where the Council lets the Contract, procurement and contract management. In addition, other re-charging services would lose income e.g. IT services. However, office space at a peppercorn rent would be released

- The biggest risk in introducing charges for services which are optional to subscribe to is that people who really do and could benefit from a community alarm service opt out. As well as the cost of paying a charge, factors such as lack of understanding, forgetfulness, lack of confidence or the ‘mañana’ syndrome all affect whether people seek out and sign up to an alternative service and mean people will sign up to a scheme in place, but will not actively seek out a replacement
- In addition, we recommend that a business and wider impact assessment is undertaken. For example, the services recharged to the Lifeline Service will lose income should the service be fully outsourced. The transfer out of the monitoring beyond Charnwood borders might result in a negative impact on employment and the local economy impacts of around £200k assuming staff are local.

3.3 Summary of Options

In this ‘analysis’ below, options

- 1A, 1B and 5 appear to have less risk attached but
- Option 4 may reduce in risk as more becomes known.

However, the underlying assumptions for all options need to be explored in more detail, before any commitment is made.

Option	Description	Time Scale and risk for organisation	Potential Risk for customer
Option 1A: ‘Community Lifeline Service’	Retain in house monitoring and Control centre. Increase customer base.	Short Term Medium Risk	Low
Option 1B: 24/7 hub	Retain Control Centre and merge it with other 24/7 in house functions	Medium Term Medium Risk	Low
Option 2: Invest	Invest in the Service to achieve a service with wider technology function...- based on an agenda developed with key Partners.	Medium term Medium Risk	Low
Option 3: Offer service for free	Offer service free-of-charge to tenants in hard-wired provision, subsidised through General Fund.	Short Term High Risk	Low

Option	Description	Time Scale and risk for organisation	Potential Risk for customer
Option 4: Wholesale Transfer to Tunstall	Pull out of provision of Lifeline and monitoring. Recommend all service-users transfer to Tunstall.	Short Term <u>Currently</u> Medium -High risk	High
Option 5: Outsourcing by choice	Contract for monitoring service elsewhere, ideally choosing a partner that offers the potential to work closely to bespoke the service.	Short Term Low Risk	Medium
Option:6 Customer self-contracting:	Advising customer the service is ceasing and that they must seek their own Lifeline service from the 'market'.	Short Term Low Risk	High

However, Sitra would stress that any decision to retain the monitoring service in-house must not be seen as a decision to continue as before.

For any in-house option to be sustainable, real investment in changing and developing the Lifeline Service must be made. To put this in perspective, it is estimated that the 'successful private sector' invests between 1-10% of its turnover in research and development. In terms of the Lifeline Service, this would amount to between £3k and £30k. If the Council decides to retain the monitoring service we would suggest that there is an external-to-the-service 'challenge' arrangement in place to make sure this happens.

Many of these options presented require some level of subsidy, therefore the Council needs to make its decision in the wider context of other budgetary pressures. It has been outside this scope of this review to talk to current, past or potential service users but as part of developing these options we would strongly recommend that preferred options are 'market-tested' before they are introduced. Staff too, have significant expertise on how the options could work in practice. .

Please note: except where indicated all charges are exclusive of VAT.

3.4 RETAINING THE MONITORING SERVICES IN HOUSE: OPTIONS 1-3

3.4.1 Option 1 A: Community Lifeline:

- **Retain in-house monitoring service and**
- **Widen and increase customer base.**

Monitoring Service

This 'Community Lifeline' option would see the retention of the Control Centre in-house. We propose that this option would need to be done alongside serious commitment to invest, in both time and energy, to widen and increase its customer base.

The target would be an increase in the number of service users to reach 3,000 to 4,000. Within the industry it is suggested that this level of monitoring seems to have a 'glass ceiling' at district level⁹.

The service would be offered 'at cost' across all tenures so that the Control Centre can move towards being a self-sustaining business. In particular, it should make focussed efforts to offer the service to vulnerable adults in general needs stock (potentially 50% - approximately 3,000 tenants). It is suggested that in widening out the service the 'private lifeline service' is renamed "Community Lifelines" or similar.

Emergency Call Out and other Support

In this option the emergency call out, currently offered at no extra charge, would either not be offered at all or provided as an additionally-charged service.

A range of additional options could be developed including for Cross-Tenure Real-Charge Support Services. This option is covered in the chapter on Warden Service Options.

Key Safes and other 'free services

The supply /installation and removal of key safes to private sector Lifeline Customers would become a chargeable service at cost, but with the option to subsidise this to people on low incomes. The cost of this service needs to be market-tested to see if a more cost-effective way can be found to deliver this service. For example, as part of a voluntary-sector 'handyman' service.

Other currently 'free services' such as a second pendant become chargeable. Either, each pendant can be seen as a 'connection' and charged at full rate, or a discount offered because a separate portable alarm unit is not needed. However, the impact on income is potentially marginal and therefore has not been accounted for in the costings offered below.

Benefits

- The Council see its sheltered services as a valuable resource and the Lifeline is almost certainly viewed as an integral element of this service.
- Vulnerable adults – as a generalisation - tend not to handle change easily. Relationships of trust will have grown up between current users, the service and staff.
- The Council has a resource which, once given up, would be difficult to re-introduce. In particular the knowledge of staff and the relationship of trust that exists with customers.

Assumptions

- That the current users of Lifeline Service value the existing monitoring arrangements. Regular feedback seems to suggest this but this needs to be tested, as part of consultation on options to understand 'loyalty to the current brand' which will result in resistance to move to a new provider – even where this may be a cheaper or even free service
- Based on the figures in the table below we have assumed a loss of 500 service users to the County Telecare Contract because their charges will be paid for through the County's Fairer Charging arrangements. However, there is still uncertainty about whether even then people will transfer – especially if the charge introduced is low.

Assessment of current Lifeline Customers in hard-wired units for eligibility for Fairer Charging subsidy (Based on figure provided by the County at the beginning of June 2015).	Numbers of Lifeline users	Assumptions
Pending Assessment by SCC	41	Assume most will remain in Telecare County Contract
Funded by County - County pay Tunstall	396	Assume most will remain in Telecare County Contract
Service Users receiving other Non-Residential Service from County - County pay Tunstall, add the service charge to their Care Package and Service User to pay up to their assessed max. contribution	89	Assume most will remain in Telecare County Contract
Self-Funded - Service User pay Tunstall	356	Would anticipate will not Transfer because the Charnwood Lifeline Service charge will be cheaper and local.
Total	891	

- That there will be no early de-designation of hard-wired schemes and that all properties will be fully let. However, a reduction of 25% tenants in hard-wired properties could result in the loss of a further 360 'automatic' service users
- That there is potential for other client groups in the whole of the area covered by the Council to take up the Lifeline Service, especially if the Service can be offered at a competitive and attractive price. This would need to be market-tested;

Staffing

- That 30% of Principal Officer function should be allocated to Lifeline Service – although this needs to be tested and reviewed. Of this there would be a 50/50 split between the Control Centre functions and the marketing of the Lifeline Service.
- There is not any significant potential for reduction/increase in other staff costs in any detail. The current single staffing of the Control Centre is a minimum and so while Control Operators may be underutilised, the number of hours they work cannot be reduced.
- That a proportion of Administration Assistant reporting to the Principle Officer – Supported Housing Officer should be charged against the Lifeline Service budget, although this could be minimal.
- That the Team Leader post should be retained -this post offers both supervision of staff, quality control and day-time back-up. While the Lifeline Officer (average of 4 installations and 4 de-installations a week plus marketing functions) may also be underutilised, the ambition to increase the customer base, perhaps seek TSA accreditation, means it does not make sense to reduce this resource in the short term. Rather invest the resource in developing the service.

Funding

Investment

Time and energy needs to be invested in developing and widening the customer base and this includes training and marketing.

Marketing needs be wider than 'leaflets' and to include piloting/demonstrating benefits. It could include a 'reduced introductory rate' for example. These costs need to be set against any initial expected income. It should build in marketing beyond tenants and local residents to include relatives.

Potential reduction of chargeable costs to Lifeline Service:

- a) By not providing:
 - Free Emergency Out-of-Hours call out service (budget approximately £25k);
 - Free key safes (£10K) and second pendants;
- b) The inclusion of income from other Control Centre functions (approximately £17k):

- Out of Hours services
- Lone working etc.
- Increase in installation charges from £30 to £35, charging for pendants etc

c) Reducing costs (at least £3.5k)

- equipment budgets etc
- Re-negotiating Disaster Recovery (back up arrangements) or finding mutual 'free' arrangement;

This helps reduce overheads for the Lifeline Service by approximately £42k, once the £15k for the Principal Officer time is added back in. The impact of this reduces budgeted costs of service (2015/16) from £350k to about £310k.

Implications for Charges at this reduced level of overheads

As an illustration, the **average** cost per service user needed to recoup these costs is illustrated in the table below and amply demonstrates the business sense of growing the service

Number of Users	1,000	1,500	2,000	2,500	3,000
Overheads of £310k and charge at 52 weeks a year	£5.96	£3.97	£2.98	£2.38	£1.99
With VAT	£7.15	£4.77	£3.58	£2.86	£2.38

Making a 'real-cost' charge would mean that, except in the areas indicated below, there would be no need to subsidise this Lifeline service. This allows the service to be offered 'universally'. At an assumed level of 2,000 users this becomes a very competitive charge (especially by comparison with charges in the County Telecare Contract).

Opening this service up to anyone who is willing to pay the charge could have wide ranging appeal, for example, from the young single person who feels unsafe at night to someone who has panic attacks. Protocols need to be developed where somebody may be 'high-demand' say because of mental health issues.

Within this overall real-charge approach there are a number of options that offer a choice of services and costs to service-users e.g.:

- including/ not including emergency call out
- community support options
- installation charges paid up front/for a lower weekly charge
- key safe/no key safe
- weekly welfare call/no regular call
- Telecare sensors.

Other organisations offer similar services and so it is easy to see real examples in operation in the Telecare Examples from Elsewhere report.

Hardwired schemes

In this model we would expect tenants in hard-wired schemes to pay a lesser Lifeline Service charge because there are no equipment installation costs; the demonstration of pullcords is a function of the warden service or housing management staff. In addition, the capital costs of the hardwired schemes have probably been repaid some time ago. As a guestimate we think this could be 30%.

Assuming the loss of 500 users to the County Telecare Contract and 1,500 users in other sectors (after increased marketing), charges (ex VAT) for tenants in hard-wired schemes could be:

Number of Users	1,000	1,500	2,000	2,500	3,000
Average charges if overheads of £310k and charge at 52 weeks/ year	£5.96	£3.97	£2.98	£2.38	£1.98
Equivalent charges over 48 weeks	£6.46	£4.31	£3.23	£2.58	£2.15
Illustrative charges for tenants at 30% less and over 48 weeks	£4.52	£3.01	£2.26	£1.81	£1.50

In this scenario the charges to service users, other than those in hard-wired Council properties may need to be increased to balance budgets

Landlord Functions delivered

Initial figures suggest that 30-50% of Control Centre activity is, via the hardwired alarms systems, the delivery of landlord functions, especially on sheltered schemes (less so on CAS units). There has not been time to undertake detailed or robust safe analysis, but what this indicates to us is that this may provide an opportunity to discuss with Housing Benefit whether any element of the Lifeline Service might therefore be Housing Benefit eligible.

Quality

We suggest that the Service work towards TSA accreditation as it will build confidence with partners and opens up opportunities for support and learning. We would also suggest that the quality of the Lifeline Service could be improved in this Option by offering a range of additional services which do not necessarily increase costs to the Council (because there is existing staff capacity):

- Monthly call test (rather than 6 monthly) – as this keeps customers familiar with the technology as well as ensuring the systems are working effectively;
- A weekly welfare check call either as standard or for a small extra charge to customers who do not have a warden service or regular weekly contact with their family.

3.4.2 Option 1B: Hub for 24/7 Services.

Building on Option 1A, retain an in-house Lifeline Service including monitoring function and group other 24/7 functions with it to share overhead costs.

Description

The 24/7 hub option is an 'add on' to options 1A, and 3. It is an option for the medium term. It focuses on making all the Council's 24/7 services more cohesive and cost effective.

In this option we would stress the need to see the Control Centre as a 'separate business' which in turn can offer services to a range of clients. However, it is essential that the monitoring of Lifelines remains its overriding priority.

The Control Centre already provides services in addition to the Lifeline Alarm monitoring and response. These include:

- Landlord services which include door entry monitoring; response to communal fire and smoke alarms in sheltered housing, and communal pull chords (HRA functions)
- Dealing with Out of hours calls for the housing repairs service; (HRA),
- Providing a lone worker monitoring service to some housing staff (HRA), staff funded through the GRA and to staff external to the council.
- Anti-Social Behaviour calls (GRF /HRA);
- Environmental Health Notice Nuisance calls (GRA?)
- Key holding and alarm monitoring for a number of Council buildings;
- Low level emergency planning functions;
- Administration services on an ad hoc basis.

With the exception of the lone worker service to external organisations, the Control Centre does not appear to receive income for providing these services.

In addition there are a number of other 24/7 services which the Council provides or which it could provide to others. Most notably CCTV monitoring functions. This option may depend upon, for example, the number of cameras being monitored both now and intended in the future, as well as agreements with Partner organisations.

However, it has been outside the scope of this review to consider these options. The key reason for considering this option is the potential to make the Lifeline Service and all the other 24/7 options for the Council more cost-effective and sustainable.

This could also enable double staffing which carries less risk around lone working. This in turn would ensure that quality is maintained in light of an increased level of calls which may be generated by increasing the number of customers or widening of the range of services being offered.

Assumptions

- We have not been able to look at the overheads and costs of other 24/7 services but we have assumed that the savings could be shared in such a way that the costs of the control centre staff could be split at least 30/70 - the latter being the proportion borne by the Lifeline Service. In other Control Centres which monitor to CCTV, the split of costs is often 50/50.
- That initially the Control Centre remains single-staffed but dependent upon on the level of expansion of the customer base and the mix of work involved, this may not remain tenable.

Funding

Costs of Service

Potentially, we believe **Control Centre costs** could be reduced by between 30% and 50%. This could reduce costs to the Lifeline Service by between £78,000 and £120,000.

Assuming the savings in Option 1A have already been achieved the Lifeline Service Costs Monitoring overheads are now reduced to approximately £310k. If we make a further assumption that a 24/7 hub option means overheads could be further reduced by £100k to £200k.

Assuming overheads are now reduced to £200k the real-cost charges would look something like this:

Number of service users	Average Monitoring charge over 52 weeks (with VAT)	Charge to hardwired users over 48 weeks (No VAT)
1,000	£3.85 (£4.62)	£4.17
1,500	£2.56 (£3.08)	£2.78
2,000	£1.92 (£2.31)	£2.08
3,000	£1.28 (£1.54)	£1.39

At 2,000 users plus, these are highly competitive charges.

Lone workers

In addition, there is an option to increase the number of Lone Worker monitoring connections significantly. There are a wide range of employers who have to ensure the safety of their staff in lone-working situations This is a 'background service' offered by the PNC which involves very little staff input except for set up and the occasional issue being diverted to the Control Centre.

However, it is suggested that charges are reduced from the current £100 p.a. to £50 p.a. per worker (i.e. less than £1 per week per staff). At this charge, 200 connections would provide an income of £10,000. Five hundred connections could generate up to by £25,000 p.a.

We would identify the following risks:

- In house services that currently are not recharged for the services provided by the Control Centre, once charged may seek alternative solutions to providing the service
- The Control Centre (and in turn Lifeline Service charges) becomes heavily dependent upon the continuation of the other services it provides.
- There may be strong competition to provide Lone Worker services going forward.

Quality

- Any merging of services must be on the principle that response to Lifeline Community Alarm alerts must take priority over other services provided.

Double staffing

- An alternative to reducing overheads is to move to double staffing which provides for a more robust/ even higher quality service.

The service users should not notice any decline in quality due to this proposed change.

In fact, the 'no loss of quality of service' needs to be a guiding principle for widening the Control Centre functions.

3.4.3 Option 2: Invest in the Equipment and Service - based on an agenda developed with key Partners – a longer term development

In this **Invest** option the community alarm monitoring function remains in-house as Option 1A and there is further investment in technology; in particular, the monitoring systems are improved to by additional functionality.

Developments in the Telecare and Telehealth industry are developing apace. Up-to-date information should be sought before investment in equipment is planned.

Currently monitoring is undertaken using Tunstall PNC5 equipment and software. It is worth noting that whilst the Council only uses the system for Lifeline monitoring, it does have the capacity to support some Telecare options. Tunstall's upgraded PNC7 for example, provides additionality in the following ways:

- Can support up to 200 operators
- Allows multi-centre operation
- High fault tolerance
- Monitoring of remote/moving lone workers through locatable devices
- Workflow tools to allow operators to manage a number of incidents at once
- Remote access i.e. system can be accessed from another secure source
- Remote programming of equipment in 'the field'
- Links to other software system to allow automatic billing via for example Northgate-software
- Enables Providers to offer Disaster Recovery to a number of other sites (source of potential income)

At present, it is believed, the Council would not gain from this additionality. In addition, further key developments are expected soon.

Although Tunstall is a key provider of equipment, maintenance and other services, other providers are gaining footholds in the sector, notably Jontek, Chubb, VoltDelta, Verklizan, and Bosch.

The British Standard BS8521 helps to ensure equipment is compatible. The standard has the backing of all the major equipment suppliers and it is now increasingly possible to 'mix and match' equipment.

Help and Support

The Northern Housing (Purchasing) Consortium, (of which the Council is a member) is currently developing a Telecare specification for tendering arrangements, which will be in place by November 2015. As a member the Council can see this to get the sense of 'what is out there'. Once the Consortium's tendering is completed the Council will have access 'real costs'.

It is also suggested that the Council joins the Telecare Services Association (TSA) (£1,100 p.a.) as membership includes 1 day's consultancy time from a Business Relationship Manager who can give independent advice on the best way to meet current and future needs. They can also 'match' providers and so establishing opportunities to visit other Control Centres to see how things work in practice.

Longer Term

In the longer term the Council will need to explore options that are not dependent upon the provision of a telephone landline. Mobile technology (GMS) is already available and there is potential offered by broadband and Wi-Fi functionality. There is also now increasing potential for services to be provided not through 'Telecare equipment' but to 'apps' linked to personal 'Apple Watch' type technology and with an emerging techno-savvy older generation this development may prove popular.

Funding

The Council has received a quotation from Tunstall which would allow the Council to buy the current, most advanced version of their monitoring equipment offered by Tunstall - PNC 7 at a cost of £138k, including maintenance contract. A leasing option would cost approximately £149k over 5 years.

Some equipment providers also provide equipment on a lease basis – but only charge according to the number of connections monitored. This could be a cost effective option for smaller Control Centres.

Typical Costs for Telecare equipment without installation/set up costs

Heat and smoke	£40 - £50
Reactive falls sensor	£75
Bed/chair occupancy sensors	£135 for controls and sensor
Flood detector	£80
Gas detector	£125 depending on requirements
Temperature extremes	£65
Carbon monoxide	£70
Property exit	£240 depending on configuration, which can be varied

Any decision to invest significantly in equipment should be delayed for 6-12 months to allow for:

- the sustainability of the Control Centre to be established, including any decisions about merging 24/7 functions are made
- the future and impact of the County Telecare Contract to 'play out'
- the launch of Tunstall new developments are launched
- the outcome of the Northern Housing Consortiums tendering to be made available to give accurate costings.

The decision to invest will need to be assessed as part of the decision to invest in the context of a Charnwood Vision for Ageing Well.

3.4.4 Option 3: Offer Lifeline Service free-of-charge to tenants in hard-wired

This ‘free-of-charge’ option assumes that the Council, in order not to lose service users who may be eligible for full or part funding under County’s Telecare Contract and Fairer Charging arrangements, is prepared to subsidise their cost. To achieve this it needs to find opportunities to provide the community alarm service free of charge to existing and future tenants of hard-wired community alarm schemes.

Assumptions

- That all hard-wired dwellings are/ or are to be fully occupied (so a void and/ or de-designation % needs to be applied).
- Assumes existing levels of usage at 2,000 service users.(but have also given an illustrative example at 2,500)
- In this Option, Telecare sensors and the monitoring of them need to be provided, at least on a small scale, to match the County ‘offer’. In general, these can be monitored through the existing PNC arrangements.
- However, there may be some need to invest in sensors, but how many or what type is not known. Despite this, we believe that these can be bought from the existing or even reduced budget provision. In themselves, sensors do not necessarily increase the need for monitoring except where there is a high demand client.

In the short term, we suggest that over the first year, level, type, monitoring and training issues are piloted and then adjustments made in the next year’s budget’. Provisional prices for equipment can be obtained through the Northern Housing Consortium membership.

Funding

Until confirmation of Housing Benefits’ view of any eligibility of Lifeline costs for Housing Benefit, we have illustrated here a subsidy to the hard-wired schemes. To illustrate potential funding options, the assumed Service Costs in Option 1A are used as follows:

Number of Users	2,000	2,500	3,000
Average charges if assumed service costs of £310k and charge at 52 weeks a year	£2.98	£2.38	£1.98
Equivalent charges over 48 weeks	£3.23	£2.58	£2.15
Illustrative charges for tenants at 30% less and over 48 weeks	£2.26	£1.81	£1.50
Approximate Subsidy needed from CBC for 1448 tenancies	£145k	£127k	£105k
At say 75% occupancy	£108k	£94k	£79k

OPTIONS 4-6: OUTSOURCING MONITORING ARRANGEMENTS

3.4.5 Option 4: Commit to the County's Telecare Contract and existing users transfer to the Tunstall National Monitoring Centre.

Tenants in hard-wired properties eligible for a free community alarm service, as a result of a County's Needs and Fairer Charging assessments, will be invited to receive a service from the new County Telecare Service with Tunstall at no cost.

Their only other option to receive their service from a provider of their own choice appears, at this stage, that they fund that service themselves.

Other tenants and service users have the choice to change or not to change to the services provided by Tunstall but, if they do, will have to pay the new contract rate for the services they receive. The Council could consider recommending to all service users that they should receive their community alarm service in this way.

Once the existing service terminates there is no requirement for individual service users to follow this advice.

The community alarm 'standard service' being offered through this contract is not the same as the Charnwood Lifeline Service currently offers. While the County Contract allows for monthly testing with the service user (Charnwood Lifeline Service offers only 6 monthly), the Tunstall service does not include services included in the Charnwood Lifeline Service, in particular flexible welfare checks – for example a daily call when someone is in crisis or has come out of hospital.

Landlord Functions

If the Council is providing at least part of the service as the landlord and using the hard-wired facility to do so, it would be assumed that the landlord can decide who should supply this service.

If the Council decides that these functions were to be provided by a different provider, any community alarm support function would need to be provided through a separate portable alarm unit. To have two systems in place would be very confusing for the tenant and, we would suggest, untenable. For the tenant it will only be manageable if both the landlord services and the support services are provided in the same way.

In this option, the Council needs to enter into a contract with Tunstall to monitor the remaining landlord services, e.g. door entry; communal smoke alarms and communal area pull-cord, the lone worker arrangements for cleaners reporting on and off site.

Assumptions

- There is no specific contract in place between service users previously funded under Supporting People arrangements and the County which enables them to determine which community alarm provider should provide services to them

- There is no current agreement in place for the Council to transfer personal data to another provider
- Approximately 500 service users in hard-wired properties would be fully-funded under the new contract (see option 1A for more detail)
- The provision of the service by Tunstall to service users who are not being subsidised by the County will be a direct contract between the service user and Tunstall
- Tunstall will be responsible for installing alarms (although their website indicates self-installation only is offered); marketing and demonstrating the services
- County have established that their Telecare Contract is in line with the letter and spirit of the Care Act 2014 which stresses the importance of the individual being in control of their support and care planning
- Tunstall will waive any penalty clause for the early termination of the maintenance contract should they take on responsibility for maintenance– but see below
- Services provided directly provided by a private supplier to an individual customer (even if they are a tenant of the Council) will be liable for VAT (except where the service user has a long term illness or disability and are exempt from paying VAT).

However, beyond the above assumptions, the current considerable fluidity and lack of clarity about the delivery of this contract makes it difficult to develop assumptions further on the following even though they are important to know:

- The extent to which the service will be delivered through existing hard-wired arrangements or whether portable units will be installed
- The cost and arrangements for the monitoring the landlord functions
- Who is responsible for paying for the maintenance of the hard-wired alarm systems
- The interface between the warden service – will they still take calls on site – for example or will the Tunstall service by-pass this arrangement
- Will there be separate arrangements/charges for warden handsets or are the handsets now redundant?
- A clear list of charges – for example the enhanced charge for Telecare Sensor monitoring in hard-wired schemes
- Who, if anyone, will support the service user in applying for VAT exemptions, where eligible?

There needs to be considerable detailed discussion about how this new arrangement will work in practice before any commitment by the Council is made to it.

Funding

We have been advised that the charges for provision of community alarm services under the County Telecare Contract are as follows (all charged over 52 weeks).

Type of Service	Charge per week
Provision of a portable community alarm with monitoring of alert calls only;	£3.78 plus VAT (4.54)
Provision of a portable community alarm with up to 3 sensors plus monitoring of alert calls	6.19 plus VAT (£7.43)
Provision of an additional emergency mobile response service	£3.50 plus VAT (£4.20)

In addition, it has been suggested that hard-wired schemes which include a smoke detector (classed as a Telecare sensor) in the tenant's property will incur a charge of £6.19 charge plus VAT as this is charged at the multi-sensor rate.

No indication of charges for the monitoring of landlord functions has been made available. Tunstall have negotiated such charges with Seven Oaks, another provider in Leicestershire but felt they were unable to share what these charges are or what they would be for the Council.

However, whatever the charges, it would be clear that these are a landlord charge and should be part of a conversation as to their possible inclusion in rent or a service charge.

As an alternative, the Council has **an option** to subsidise charges that tenants have to pay, in part or in full. There will be 1,448 sheltered and CAS properties once the Riversdale project is complete. This assumes void properties will be let and no properties will be de-designated.

Assuming 500 of these customers are funded by the County Contract, this leaves 948 who still may benefit/be required (as part their tenancy conditions) to have the Lifeline service. Subsidising these at full cost could be as much as (maximum):

Subsidy for tenants in hard-wired properties not included in County Telecare Contract	Maximum Subsidy for 948 users (including VAT)
Alarm monitoring service only	£224k
Alarm and up to 3 sensors (possibly including smoke alarm)	£367k

We believe there is considerable risk with this option at present not least because there are so many unknowns. These risks may reduce following more detailed conversation with County and Tunstall and there remains the risk that some tenants will not 'get round to' transferring and be left without support

Quality issues

The Council would in effect lose control over any community alarms services provided to its tenants and vulnerable adults in Charnwood, and therefore could not prescribe or influence their quality.

Tunstall monitoring services are provided through a Control Centre in Yorkshire which monitors over 120,000 connections. It provides a simple standard menu-driven monitoring service, with no variations. Tunstall have indicated if the Council wanted to negotiate any different standard of service on behalf of Charnwood residents there would be additional costs involved.

3.4.6 Option 5: Outsourcing Monitoring Arrangements with Partner of Choice.

In this Outsourcing by Choice option, the Council seeks a 'value for money' option by working directly with another Control Centre to provide community alarm monitoring services to its service users.

This option does not include outsourcing the installation of Lifelines or the billing and marketing functions (although there are other variants where these functions can be outsourced too). However, there are possibilities to transfer the landlord functions but with additional costs e.g.:

- Door entry monitoring, which is a significant part of Control Centre functions
- Smoke Alarms in communal areas
- Communal alarm pull chords
- Calls from/to warden handset
- Calls related to cleaners/wardens going off site.

In effect the Control Centre would be disbanded and therefore the future of other services it offers would need to be considered, for example, Housing Out of Hours Emergency Repairs, and lone working.

This is a low risk option for the Council in that it only pays for the number of connections that are needed outside of the Telecare Contract.

It is likely the service could be provided by neighbouring authorities so retains some element of 'local'.

It can be branded as a 'Charnwood' service, despite the backroom functions being conducted elsewhere.

Out-of-hours and day time response service would also be part of a separate consideration – and could continue to be delivered by Charnwood e.g. as discussed in Option 1A.

Nor would it affect the establishment of Cross-Tenure Real Cost support service.

Assumptions

- The monitoring charge made by the external provider could be approximately (exclusive of VAT) £1.40 per week (52 weeks), but that marketing, installations and landlord functions would be additional, as would extra services such as out of hours

Funding

Costs to the Council

Assumed monitoring charges of £1.40 per week per connection over 52 weeks would cost the Council as follows:

Number of Service users	Cost of Charges per annum		
Assumed charge to Council for each connection per week for 52 weeks	£1.00	£1.20	£1.40
1,000	£52,000	£62,400	£72,800
1,500	£78,000	£93,600	£109,200
2,000	£104,000	£124,800	£145,600
3,000	£156,000	£187,000	£218,400

It can be seen that, as the number of users increases, the costs get closer to the Council to those where the Council retains its own Control Centre. This would particularly be the case if option 1B costs were compared with those above.

There would also still be an option to subsidise as in Option 1A. The Council would still retain the need to fund the other 24/7 services the Control Centre provides, fund the provision of equipment, and the Marketing and Installation Service.

It would also lose potential revenue from the Lone Worker Service.

Income which could be generated

Service User Charge p.w. x 52 weeks /Number of users	1000	1500	2000	2500	3000
£3.70p	£192,400.	£288,600	£384,800	£481,000	£577,200
£4.00	£208,000	£312,000	£416,000	£520,000	£624,000
£4.40	£228,800	£343,200.	£457,600	£572,000	£686,400

Quality issues

Any contract will need to specify quality issues, including TSA membership and accreditation but also feedback from existing service users and references from organisations where similar services are provided.

A comparison of the Charnwood Lifeline Service, with one provided through a nearby Control Centre suggests that there would not be a significant change in the quality of the service.

However, there is a long standing belief, but not a lot of factual evidence, that locally-based control centres provide additionality of local knowledge. E.g. they are familiar with what local services are called, and can immediately grasp distances and times for responses to occur.

3.4.7 Option 6: Service Users choose their own community alarm providers

In this option the council terminates its service arrangements with private sector users and suggests that they seek the service from another provider. Within this option the Council could research and recommend a number of providers but this may have legal implications if the services are not to expected standards. This option is less clear for tenants in hard-wired properties where the Council could provide a landlord-only service through its hardwired system and charge for this.

Assumptions

We believe, that significant numbers of older people may end up without support

Funding

A range of example charges of other providers is provided in our Report of Telecare: Examples of Practice Elsewhere. These range from about £2.50 plus from national providers up to £4.60 plus VAT from local Providers

In this option it is assumed that the Council does not have any obligation to subsidise but it could if it chose to do so. It could subsidise on a needs basis and/or benefit eligibility for example like the current Lifeline Grant. However, there would need to be 'assessment arrangements' put in place. For example, subsidising 500 users at £4 per week (inclusive of VAT) over 52 weeks of the year would cost £104k.

Quality issues

The Council has no control over the quality of the service provided. Service quality and what is offered varies between service providers and would be for service users and their families to research.

APPENDIX 1

A. N. OTHER Borough Council

JOB DESCRIPTION

Job Title:	Intensive Housing Management Officer
Department:	Communities & Neighbourhoods
Grade:	Band TBC
Accountable to:	Team Leader – Intensive Housing Management
Job Purpose:	To manage the appropriate housing management services to tenants of older persons housing schemes and properties in the Borough of A N Other. To also provide services to those tenants with assessed need as required.

Corporate Responsibilities:

1. To contribute to the Council's corporate policies and strategies, working with officers from all departments of the council.
2. To promote, facilitate and assist in the implementation of the Council's corporate and strategic approach to service delivery.
3. To promote, facilitate and assist in the implementation of a customer focussed approach towards the provision of the Council's services.

(b) Performance Management Responsibilities:

1. To work closely with all Council officers and managers so as to achieve maximum results within performance management targets to deliver to Council priorities and wider objectives
2. To participate in the production of regular detailed management information.
3. Produce and implement individual tenant's records. Assist tenants to understand their rights and responsibilities under their tenancy agreement.
4. Make contact with tenants as per scheme agreement or intensive housing management offer.
5. Maintain tenant records using appropriate IT systems.
6. Ensure Tenants views and voices are heard and satisfaction with services monitored and

(c) Departmental Responsibilities:

1. To carry out weekly safety tests in dedicated schemes and maintain a safe and healthy physical environment for tenants and staff responding as required to health and safety issues.
2. Carry out weekly fire alarm tests in relevant schemes and resolve any resulting issues.
3. Manage secure access to schemes for tenants, staff, visitors, maintenance and service contractors.
4. Facilitate viewings and assistance with individual accommodation needs and risk assessment.
5. Assist tenants to access correct housing benefit allowance or financial advice to pay rent/service charges.
6. Ensure communal areas are properly maintained and serviced.
7. Carry out assessment of tenants needs to ensure they receive services which they require to maintain independence in their home.
8. Assist residents to challenge and report ASB issues.
9. Monitor Lifeline usage and install units where required.
10. Arrange and organise activities where required. Ensure health promotion messages are communicated to tenants.
11. Liaise with partners to promote independence and digital access to services including Me & My Learning.
12. When vulnerable tenants are deemed to be at risk ensuring they are referred to safeguarding services and the A N Other Vulnerable Adults Group.
13. To ensure high standards of customer care are maintained and that all enquiries from the public and Elected Members are dealt with efficiently and courteously.

The execution of the above tasks will sometimes involve working outside normal office hours.

The above list of responsibilities is not exhaustive. The responsibilities and duties will vary from time to time without changing the character of the post. The postholder will be expected to adopt a flexible approach to ensure the efficient and effective implementation of relevant legislation, the Council's policies and programmes.

APPENDIX 2

Examples of Community Alarm Practice elsewhere

1. Providers

Most control centres are run by either local authorities, manufacturers, commercial firms, housing associations or charities. Some are national and some are local. What they provide to whom will vary.

2. Marketing

Information needs to be targeted to potential service users, their family and friends, professionals who work with vulnerable people and decision-makers especially those who hold pots of potential funding.

Increasingly people **search the web** for services and so it is as important to employ Search Engine Optimisation (SEO) to ensure that services appear on the 'first page' of search engines, when a range of search options are used.

For example, the Government has search function for community alarm services <https://www.gov.uk/apply-for-community-alarm> If a Charnwood postcode is entered only the Charnwood Lifeline Service is given as an option.

There are also a number of websites that people are likely to 'trust' and accept recommendations via links to the providers website. However, some of these such as 'Age Concern UK' are also competitors.

<http://www.ageuk.org.uk/products/independent-living/personal-alarm/?ito=GAG12604257607&itc=GAC75149789527&itkw=+telecare&itawmt=b&itawnw=search&itadv=c&gclid=CJWr3lWj9sUCFUbjtAodlCYA8Q>

Word of mouth is a key marketing tool. This can be via friends or professionals and enhanced through demonstrations and presentation.

Demonstration projects and pilots, together with robust evaluations can help to influence decision-makers and professionals. Evaluated examples from elsewhere can also be used.

Written material can still have some impact but perhaps less so than in the past, especially to reinforce information given in other ways.

Pictures often speak louder. Telecare is a 'new world' and 'visuals' are particularly important. Demonstration videos /you tube are another variant which can be considered. http://www.worcstelecare.org/pubs_and_media/videos.php

3. Eligibility

Generally eligibility criteria has been applied because community alarm services were often subsidised by the Council or through some other means e.g. Supporting People. However, if the service is offered a real cost there is no need to apply eligibility criteria.

However, the service needs to have clear strategies for people who are potentially 'high demand'. It needs to be remembered that community alarms services are meant to meet 'low level' need. However, they can be part of a wider package to support higher levels of need.

In addition in offering the service to specific groups of people – such as those experiencing domestic violence (e.g. EM Homes) training must be given to staff.

a) Older People only

While community alarm services developed initially mainly to support older people, increasingly the services are being offered more widely.

Even where they are still offered to 'older people' only, the definition has widened to people in their 50's, for example.

Gosport Borough Council only offers their service to older people.

Whereas Warwick District Council provide the service to Lifeline is available to anyone in the Warwick district and Stratford district areas who is over 50, disabled or living in a vulnerable situation.

'Who Uses Telecare?' found that 375,000 people used personal alarms and 715,000 used alerting devices in England in 2007-08 among the 50+ age group – although these are likely to be conservative estimates¹⁰.

However, based on careful analysis of the functional impairments of Telecare users and non-users, 'Who Uses Telecare?' was able to estimate that there were around 4.172 million potential Telecare users in England aged 50 and over at that time.

b) Disabilities

Community Alarms actually help with the increasing disability that older people often face. However, they can be useful to younger people with disability. This can include people with learning disability too. For example the Disabled Living Foundation has very clear explanations of the benefits of Telecare and how to access services.

<http://www.dlf.org.uk/factsheets/telecare>

c) Mental Health

While some people with mental health problems can be well supported by community alarms it maybe that some behaviours may need more support than a community alarm service can offer.

d) Other

A wide range of people can also benefit from Telecare;

- Victim support;
- People at high risk of fire in the home or who find it hard to escape;

- People with illnesses that have sudden onset symptoms; diabetes; stroke; high blood pressure; epilepsy;
- Carers –concerned about who will respond to the people they care for – if anything happens to the carer;
- People who have high levels of fear;
- Families at risk;

For example EM Homes provides the service to the following people who:

- have recently been discharged from hospital;
- are housebound;
- have a disability;
- are living with a long term medical condition;
- or have been the [victim of domestic abuse](#).

<http://www.emhhomes.org.uk/living-in-your-home/support-and-advice/lifeline/>

Rugby Council offer Telecare services to;

- People who want to continue to live in their own homes with as much independence as possible;
- Carers - to provide them with more personal freedom and support in their caring role;
- People who are struggling to cope at home;
- Assist the reduction of emergency hospital admissions;
- People discharged from hospital;
- People who wish to die at home with dignity when this is their choice;

http://www.rugby.gov.uk/info/200243/supported_and_sheltered_housing/1363/assistive_technology_and_telecare

e) No criteria

There are a number of community alarm services which offer the service to anyone who can pay For example, Rugby provide a service to 'anyone' and charge £4.00 per week plus VAT

http://www.rugby.gov.uk/info/200243/supported_and_sheltered_housing/1362/lifeline_home_alarm_service_01788_579706

4. Monitoring arrangements

a) Basic Service

A minimal service usually includes:

¹⁰ The Future of who uses Telecare – the Strategic Society Centre 2012

- Responding to alerts from a portable alarm unit ;
- Summoning the help of either emergency services or two registered key holders;

b) *Variations*

- Test calls – frequency can be monthly, quarterly, six monthly or annually;
- Weekly welfare calls;
- Welfare calls at times of crisis when;
- Add in a responder service -see example below
- Telecare sensors – see below

5. Portable Alarm Equipment and Installation

a) Self-installation

Increasingly and especially national providers are providing the option to buy on line and install portable alarm units. Indeed 'Lifeline 24' describe this as their 'plug and play' option. http://www.lifeline24.co.uk/?gclid=CJTR4_-6w8UCFSLKtAodODgA3A In addition, to the weekly charge of £2.46 with VAT, the supply price of £35 plus VAT includes:

- Free Next Day Delivery
- Plug & Play Lifeline Vi Alarm unit
- Lifeline wireless pendant
- Wrist and neck straps for wearing pendant as the user prefers
- 24/7 monitoring 365 days a year from our expert care team

While this would not suit every vulnerable adult, it may appeal to the wider public to the 'new' older age group or to those who have family to help. Especially as this waives the installation cost. It may be a useful option to help increase the customer-base.

b) Supported installation

Having someone to come and install the unit (and sensors) maybe a USP (Unique Selling Point) for a local service.

However, installation charges vary as well there being options to pay these. In some case there is an option to roll these upto into the weekly charge.

Age UK, for example, provides four options:

Age UK Options	Upfront charge	Weekly charge
Age UK - Self connect	£69 plus VAT	£3.47 per week plus VAT
Age UK We Connect – Lifelong	£899 plus VAT	£0
Age UK - We Connect – Option A – installation provided	£129.00 plus VAT	£3.47 per week plus VAT
Age UK - We Connect – Option B- installation provided	£385.00 plus VAT	£2.03 per week plus VAT

See Charges section below for more examples of installation costs.

6. Telecare provision

Possibly because of the complexity of charging Providers do not give out information about the charges for Telecare options.

However, Tunstall Home offers a package of a portable alarm unit, a pendant and a smoke sensor (self –install) for a registration fee of £82.50 plus VAT and a weekly charge of £4.27 plus VAT. <http://www.tunstallhome.com/placeorder> This represents an additional 67p per week monitoring charge on top of its basic service.

North West Leicestershire offer a range of sensors

- Amie+
- Bed occupancy sensor
- Chair occupancy sensor
- Carbon Monoxide detector
- Fall detector
- Flood detector
- Smoke detector
- Property exit sensor
- Temperature extremes sensor

7. Key Safes

We did not find any examples of providers who provided keys safes and fitting free-of –charge, except for Three Oaks Homes. However, they are moving their services to the new County Telecare Contract.

http://www.lifelineonline.org.uk/how_does_it_work.html

In other areas either advice was given or a separate charge was made or no mention of key safes was made.

Gosport Council offer the option to provide and install a key safe for £45, which includes VAT. www.gosport.gov.uk/communityalarms

Stoke City Council charge £60 plus VAT <http://www.stoke.gov.uk/ccm/content/social-care/adult-social-care/lifeline.en>

Worcestershire Careline charge £95 plus VAT
http://www.worcstecare.org/telecare_services/new_and_existing/costs.php

Lifeline 24 and Age UK recommend the Supra C500, as being is the only keysafe in UK with police approval and an independent security rating, LPS 1175 Level 1, which means that the C500 provides the same security as a domestic front door.
<http://www.lifeline24.co.uk/which-keysafe-should-i-choose/>

8. Additional Arrangements

Locally based providers are increasingly providing additional services which include support visits.

1.0 **Redditch Borough Council's** Home Support Service is available to older and vulnerable people who need support to remain independent in their home.

Home Support Officers can help service users with:

1. Getting back to independence after a life changing event
2. Rebuilding confidence after an illness or fall
3. Finding and supporting users to join in with social and leisure activities
4. Keeping the user's home safe and in good condition
5. Budgeting and managing their own money
6. Support to claim benefits
7. Liaising with other agencies including form filling
8. Understanding and managing your tenancy or other agreements.

Title of Option	Cost per week
Telephone health check	£3.70
Well-being visit	£7.10
Personalised support	£14.20

Gosport Borough Council provide the following options (prices correct at Sept 2014 and include VAT). Please note that only option 1 is eligible for VAT exemption if someone has a chronic illness or disability.

Title of Option	Cost per week	Includes
Option 1: Bronze	£3.25	<ul style="list-style-type: none">• 24 hour alarm monitoring
Option 2: Silver	£9.84	<ul style="list-style-type: none">• 24 hour alarm monitoring

Title of Option	Cost per week	Includes
		<ul style="list-style-type: none"> • 24 hour emergency out from staff
Option 3: Gold	£12.84	<ul style="list-style-type: none"> • 24 hour alarm monitoring • Weekly welfare visit
Option 4: Platinum	£15.24	<ul style="list-style-type: none"> • 24 hour alarm monitoring • 24 hour emergency out from staff • Weekly welfare visit

For the Silver and Platinum Options they recommend a key safe but do not fit and supply them.

There is a notable contrast of what is on offer from **South Cambridgeshire** and what it charges for its Lifeline+ Service. The cost of the basic monitoring service is £4.43 per week (without VAT) £5.32 with, and the following charges are additional.

Title of Option	Cost per week	Includes
OPTION ONE	£1.10	<ul style="list-style-type: none"> • three telephone calls per week Monday - Friday
OPTION TWO	£4.60	<ul style="list-style-type: none"> • two well-being home visits per week and one telephone call per week Monday - Friday
OPTION THREE	£6.70	<ul style="list-style-type: none"> • a mix of home visits and telephone calls Monday- Friday, flexible to meet your individual needs, including help with: Emergency shopping • Emergency support with pet care i.e. feeding, walking • Help arranging prescription delivery services • Help to arrange transport to hospital and other appointments • A listening ear • Advice on benefits and signposting to additional services.

Again key safes are advised for Options 1 and 2 but not provided. Advice is given on how to supply one.

Stoke City offer a free Emergency Response Service which responds to Lifeline and Telecare customers in emergencies, 24/, including:

- Helping you to get up after a fall, using the latest lifting cushions to get you safely back to your feet

- Giving you first aid for a wide range of issues
- Doing welfare visits to see how you are, if you activate your Lifeline to tell us you are unwell

The Team can also help assess the risks in the home, and will liaise with Social Care or your GP.

The Responder, on average, reaches emergency cases in 20 minutes, in the meantime the Control Centre will stay on the line.

They have two Responders on duty during the day, and one at night.

For people who live in Stoke-on-Trent and pay for the Lifeline service, or receive Telecare from the Council, then the Response Service is free.

<http://www.stoke.gov.uk/ccm/content/social-care/adult-social-care/emergency-response-service.en>

9. Combinations with Warden Services

Three Oaks Homes (who provides service to Blaby and also covers much of the Charnwood Distract area) offers a Respite service which is aimed at carers and which is a rolling monthly contract for those who only require temporary cover (minimum 30 days) £6.40 plus VAT per week.

- Co-ordinator available for 24-hour emergency call out;
- Daily contact from a mobile warden;

However, in line with the County Telecare Contract Three Oaks are moving their services to Tunstall.

<http://www.lifelineonline.org.uk/respite.html>

Kettering Council has Scheme Managers and Support Workers who offer a personalised support services. The service options are:

- Lifeline alarm and sheltered alarm only support for £5.00 per week;
- An intensive housing management service is available for £14.81 per week which is completely tailored to individual requirements.
- An additional telephone service at weekends if required, £4.00 for 1 call and £8.00 for 2 calls.

http://www.kettering.gov.uk/info/107/sheltered_housing_-_council_tenants/210/sheltered_housing/4

9. Funding

There are reducing options for funding Lifeline Services.

Housing Benefit

In some Local Authorities e.g. Hinckley and Bosworth, they have included the hard-wired community service with in their new Intensive Housing Management model, as a consequence believe the service is all Housing Benefit eligible.

The advice given to them by their Housing Benefit service was, that while Schedule 1 HB Regulations 2006 specifically covers eligibility of service charges state in para 1 (c) of schedule 1 that “charges in respect of the provision of an emergency alarm system” are ineligible, they believe the Housing Benefit Regulations also make provision for other systems to be eligible, particularly where it is an integral system and the tenant does not have a choice as to whether it is installed or not (i.e. part of a communal charge) and believed to eligible.

Charity

Charitable trusts may sometimes provide funding for equipment. A useful resource is www.turn2us.org.uk, a website that allows individuals to search for organisations that give grants, including for equipment and other services. They can refine / filter their search by specific health issues such as 'physical disability', 'ageing', 'Alzheimer's' or 'unable to look after themselves'. Charities will only give awards in accordance with a predetermined criteria.

The Council could consider asking a local charity to host a community alarm system charity fund for people who have a significant need but would struggle to pay. The Charity could specially fund raise around this and/or the council could ask if people signing up to the Lifeline service would make a voluntary donation towards this fund. However, there is stigma attached to accepting charity and some people are not willing to accept it.

Government Initiatives

The **Better Care Fund (BCF)** is one of the most ambitious ever programmes across the NHS and Local Government. It creates a local single pooled budget to incentivise the NHS and local government to work more closely together around people, placing their well-being as the focus of health and care services.

The Better Care Fund is about improving the quality of health and social care available to the public. It is about moving away from a ‘sickness service’, and towards one that enables people to live independent and healthy lives in the community for as long as possible by joining up services around the individual person and their individual needs.

This can only be achieved by working differently – by working together across organisational boundaries to deliver the outcomes that matter to service users.

The goals of the programme are to:

- Gather insight and good practice aimed at helping areas overcome the barriers to successful implementation of BCF plans

- Share and disseminate good practice across the country, targeted around topics where support is most needed or local areas are facing barriers
- Facilitate collaborative discussions between areas across the country

The Department of Health's **Transforming Community Equipment Services (TCES)** programme states explicitly that Telecare systems that connect to monitoring centres are not part of this scheme. In some areas of the country a prescription scheme for equipment is in operation. There is a 'national catalogue' of equipment that may be provided by prescription although local areas can choose which of these items they will include in their local equipment prescription schemes. This includes a small range of the short-range sensor and receiver Telecare systems.

10. Charges

In many cases, in our research the charges advertised did not indicate whether they were inclusive of VAT or not. This makes a significant difference to cost and should always be made clear!

There are also way that these charges are expressed – weekly, quarter and annually.

Charges need to be simple although as more options are developed to suit customer needs – including Telecare options, charges also become more complex to describe. This can be off-putting.

See Gosport and South Cambridge examples above.

Provider	Details of Service	Installation Cost ex VAT	Weekly plus VAT	Keysafe	Quality	Comment /More info from
NATIONAL CHARITIES						
Age UK Self connect	Basic and self install	£69 plus VAT	£3.47 plus VAT	Not provided		http://www.ageuk.org.uk/products/mobility-and-independence-at-home/personal-alarms/
Age UK We Connect – Lifelong	Lifelong one-off payment with no additional weekly costs.	£899 plus Vat of £179.80	£0	Not provided		Service actually supplied by Aid-Call Limited.
Age UK We Connect – Option A	Basic plus Installation	£129.00 plus VAT of £25.80	£3.47 plus VAT	Not provided		
Age UK We Connect – Option B	Basic plus Installation	£385.00 plus VAT of £77.00	£2.03 plus VAT of £0.41	Not provided		
NATIONAL PRIVATE						
Lifeline 24 Linked to Age Concern	Self installation	£35 plus VAT	£2.46 with VAT	No separate – recommended Supra C500	TSA Platinum	http://www.lifeline24.co.uk/?gclid=CJTR4_-6w8UCFSLKtAodODgA3A
Tunstall Home Service	Self install and basic	£82.50 plus VAT	£3.69 plus VAT	Not provided	TSA Platinum	http://www.tunstallhome.com/#HowMuchDoesItCost

Provider	Details of Service	Installation Cost ex VAT	Weekly plus VAT	Keysafe	Quality	Comment /More info from
		reg- istration fee				
Blaby	See Three Oaks below					
Harborough 'rent option'	Basic and installation plus welfare call and 'Christmas call' where needed	£30 plus VAT.	£4.40 (plus VAT) per week	Not provided	None	http://www.harborough.gov.uk/info/20030/harborough_lifeline/33/lifeline_home_alarm_services
Harborough 'own'	As above – assumes you own your own Lifeline		£2.33 plus VAT	Not provided	None	
Hinckley and Bosworth District Council			£4.60 plus VAT	Not provided		Provided by NW Leicestershire
Melton District Council	Basic and installation plus welfare call and 'Christmas call' where needed	None	£4.40 plus VAT	Not provided		Provided by Harborough http://www.melton.gov.uk/info/200239/families_communities_and_living/760/melton_borough_lifeline

Provider	Details of Service	Installation Cost ex VAT	Weekly plus VAT	Keysafe	Quality	Comment /More info from
NW Leicestershire	Basic – can call when feeling low			Not provided		http://www.nwleics.gov.uk/pages/lifeline_emergency_alarm 01530 454817.
OTHER LOCAL AUTHORITIES						
Gosport Borough Council	Basic and installation	None indicated	£2.71 plus VAT	Can provide and install a key safe for £45, which includes VAT	No mention	www.gosport.gov.uk/communityalarms older people only
Redditch and Bromsgrove	Basic plus installation	£22.15 plus VAT	£3.70 a week– plus VAT	Not provided	TSA Platinum	http://www.redditchbc.gov.uk/living/support-at-home/new-lifeline.aspx
Rugby District Council	Basic plus installation	Included in weekly charge	£4.00 plus VAT,	Not provided	No mention	http://www.rugby.gov.uk/info/200243/supported_and_sheltered_housing/1362/lifeline_home_alarm_service 01788 579706 Open to anyone
South Cambridgeshire	Basic – plus separately paid for options	£20 – plus VAT?	£4.43 plus VAT	Not provided give advice on installation	No mention of TSA	https://www.scambs.gov.uk/community-lifeline-service
Stoke City Council	Basic plus responder service	None	£3.71 plus VAT	£60 plus VAT	No mention	http://www.stoke.gov.uk/ccm/content/social-care/adult-social-care/lifeline.en

Provider	Details of Service	Installation Cost ex VAT	Weekly plus VAT	Keysafe	Quality	Comment /More info from
	Second pendant £1.33					Has responder service - see above
Warwick District Council	Basic			Not provided	99% response in 60 seconds	http://www.warwickdc.gov.uk/info/20112/community_safety/126/lifeline_service_-_at_home_feel_alone Offers Telecare options Charities cover cost (01926) 339577
Worcestershire Care Line	Basic plus installation Additional Pendant 31.52	£41.00 plus VAT	£4.36 plus VAT	£95.00 plus VAT	TSA Platinum 98.5% of calls within 60 seconds	http://www.worcstelecare.org/telecare_services/new_and_existing/costs.php
RSLs						
EMH East Midlands Homes	Basic and installation	Free in some areas	£3.99 (including VAT)	Not provided	None indicated	http://www.emhhomes.org.uk/living-in-your-home/support-and-advice/lifeline/
Three Oaks Homes for Blaby	Basic and installation	Free	£3.33	Provided free	TSA member	http://www.lifelineonline.org.uk/how_does_it_work.html Offers respite service at a different charge –see above

You do not have to pay VAT if you declare that you or the person you are purchasing the service on behalf of is chronically sick or disabled person.

Sitra

Sitra is the leading charity in the housing, care and support sector providing training, consultancy and advice with a membership of nearly 500 practitioners.

We have 30 years' experience of providing technical support to providers and commissioners. This includes training and consultancy on Supporting People and the QAF, needs identification, care practice, housing management and development, together with associated activities such as personnel and staffing and financial management. The current focus on welfare reform, personalisation of services, co-production and outcomes focused support also forms the context of much of our current work.

Sitra has recently incorporated the Health and Social Care Partnership (HSCP) within its wider portfolio. A key element of HSCP's work is the integration of health and social care and this furthers Sitra's wider agenda of integration of health, social care, housing and public health.

We carry out work both on a policy level and in providing specific support for individual organisations. We are a leading training provider, running both public programme and tailored in-house courses for clients around the country. We also provide a range of seminars and conferences on housing with support and care themes.

Sitra is recognised and consulted by Government departments and other bodies, including the Department for Communities and Local Government (DCLG), the Department for Work and Pensions (DWP) and the Homes and Communities Agency (HCA), as representatives of providers of supported housing. The incorporation of HSCP brings with it a close relationship with Department of Health (DoH).

The linking of our policy and representative role with our detailed work providing support to the sector makes for a strong combination. It means that our work on good practice and policy & procedural development draws on the strength of our large membership base and on our role in discussing and developing policy at a national level.

We are a non-profit organisation, established by supported housing providers in order to offer cost-effective technical support and representation. As such, we aim to offer a quality service at a lower charging rate than that levied by commercial consultancies which choose to build a profit element into their charges.

Our members keep in touch through the bi-monthly *Sitra Bulletin* which is widely recognised as a key source of technical information and policy development news throughout the housing with care, support & health sector. You can also keep in touch via our Facebook and Twitter pages

 [@sitrapolicy](https://twitter.com/sitrapolicy)  [Like us on Facebook](#)

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