



Housing LIN

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Case Study 170

Becoming Trusted Assessors gives agency to Middlesbrough Staying Put Agency

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Introduction

Middlesbrough's Staying Put agency is a leading regional home improvement agency in the North East of England that holds the Home Improvement Agency Quality Mark. As part of Adult Social Care, they offer specialist support and advice to older people, disabled people, and people on low incomes, to help them maintain, adapt, and improve their homes.

Background

Middlesbrough Staying Put also runs a wide range of local programmes and services including major adaptations, a private works service, providing advice on Disabled Facilities Grant (DFG) funding and alternative funds, seasonal support programmes, digital inclusion support and Telecare service, help with hoarding and social isolation and a hospital to home service. The Agency offers major adaptations projects, essential repairs and adaptations, including small measures, and minor adaptations via its Handypersons service offering plumbing and joinery repairs, grab rails, stair rails, and half steps. They define minor jobs as those costing under £1,000. They are part of Middlesbrough's Independent Living Services co-located with the OT team.

With the increasing move towards remote assessment, the Staying Put team was finding that many cases required adjustment once on site when the specifics of the applicant's home environment became clearer. Without the intervention of a 'qualified person', these cases would commonly cause a range of operational issues due to having to refer to the originating service to gain approval for those required adjustments. Using a 'qualified person' means that they are able to adjust what was needed without needing a separate referral back to an OT (Occupational Therapist) causing further delays.

The team are supporting the development of a number of new projects that refer directly to them rather than via OTs and they identified that there would be a benefit to a wider range of people being accredited as Trusted Assessors. Roles included several front-end staff including handypersons, technical officers, caseworkers and some administration staff, so that this wider team would be able to assess when carrying out home visits, if the situation required it. This expansion supported the organisation's goal to provide timely holistic assessments, making sure that they maximise the outcomes from every contact.

Overall, the impetus for this training programme had less to do with tackling waiting lists, and more to do with expanding the team able to intervene in improving the quality of work undertaken and to improve outcomes. Having the training and awareness / knowledge that the Trusted Assessor training brings allows the team to manage cases internally without having to pass across and put further pressure on the OT team as well as supporting a timely response. Hospital to Home referrals in particular are often urgent.

The solution

Middlesbrough Staying Put commissioned TACT (Trusted Assessing and Care Training) Ltd to provide Trusted Assessor training accredited by OCN London in line with the national qualification for Trusted Assessor. The training was carried out face-to-face and some adjustments were made to the course content to take account of content already covered by their own in-house training.

Learners took part in the face-to-face courses and then completed assignments to demonstrate their learning and understanding.



Learners taking part in a TACT equipment course. Images used with permission

What Middlesbrough Staying Put found

Many of the benefits of appointing Trusted Assessors are well known; they flow from the ability of those newly appointed Assessors to handle straightforward home adaptations cases which would previously have necessitated a referral to an Occupational Therapist. Service Managers in their turn observe an improvement in performance and service users gain the valuable faster access to much-needed home adaptations with the associated wide-ranging impact on their daily lives and what they can do. Families, carers, and friends notice immediate changes to what the older or disabled person is able to do around their home and the family enjoys live-transforming practical, emotional and wellbeing impacts that would be hard to underestimate. Professionals know that there is also an ongoing reduced risk of falls, need for in-patient care and other complications.

The Middlesbrough team however commented that there are many positive by-products of the Trusted Assessor model that people might not initially think of. Wayne White, Technical and Development Officer gave one example:

“Social landlords will often only accept minor adaptation requests from OTs (Occupational Therapists) or ‘someone qualified.’ They ask for grab rail locations to be marked up for fitters to install, this is quite common. In the world of telephone assessment with no in-person involvement with the property, these cases would be added to the list of ones requiring an OT (Occupational Therapist) visit, often incurring a lengthy wait.”

Middlesbrough Staying Put's Hospital to Home service has a staff member called a Prevention Liaison Officer who is located in The James Cook University Hospital to aid with liaison, and a range of measures can be implemented in the patient's home helping to speed up the discharge time. They are committed to 'making every contact count': without having a qualified person on site, the only route is to request an amendment to the job scope. The integrated Hospital to Home service is designed to reduce time to discharge and enable a programme of work that can be planned and managed and can involve the carers.

Wayne concludes:

"For social landlords and commissioners of discharge services, having a Trusted Assessor involved provides the comfort that the works requested have been overseen by someone with appropriate training rather than a general tradesperson who may not have those technical and softer skills to know what is appropriate and importantly when to refer on to an OT."

Middlesbrough Staying Put handle all equipment provision, but they know that in locations where this provision is not managed in-house, the work will often be often assigned to general sub-contractors who must follow the instructions rather than initiating a better solution, increasing the number of contacts and visits needed.

Wayne summarises,

"We have also found that having that better understanding means our Handy-person Operatives are far more engaged: instead of being 'task focused' they are far more 'client focused'. We also regularly mop up any short comings in the transition from being discharged from hospital and transferring to community support. We all hope that when someone is discharged the onward referrals to community have happened, but not always so we can steer the clients back on track."

Post-pandemic, the amount of phone or bedside assessment has massively increased with no one physically assessing the environment, particularly for minor works. For Middlesbrough Staying Put, employing Trusted Assessors means that many cases can be resolved in one visit reducing the number of interventions and delays.

The team were pleased with their experience of working with TACT, commenting that they are easy to work with and straightforward people.



A learner taking part in a TACT equipment course. Image used with permission

Key Learning Points

Trusted Assessor training at level three is designed to enable staff to conduct assessments with clients, measure for and prescribe minor equipment and adaptations using clinical reasoning and best practice and be able to reflect and adapt future practice.

Learners are taught how impairment of function impacts on general wellbeing and the ability to perform a task, they take account of risk when selecting suitable equipment and understand the impact of the built environment. Assessors think about the impact on other family members and know a range of possible equipment solutions. As far as measuring and fitting they know when fitting is correct.

Above all, Trusted Assessors know when to refer to an Occupational Therapist if a case is beyond their remit.

Note

The views expressed in this paper are those of the author and not necessarily those of the Housing Learning and Improvement Network.

About TACT

Trusted Assessing and Care Training (TACT Ltd) is an Occupational Therapy (OT) practice specialising in programmes for professionals involved with assessing for home adaptations. TACT is a national provider of accredited Trusted Assessor training, offering a choice of levels and learning formats. Expert OT trainers, personalised eLearning and regular practical workshops are key features of their programmes. In 2023-24 TACT is leading a review of The Competency Framework for Trusted Assessors.

To read our articles and find out more about all things Trusted Assessor and TACT, go to:

<https://trustedassessing.com>



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About the Housing LIN

The Housing LIN is a sophisticated network bringing together over 20,000 housing, health and social care professionals in England, Wales and Scotland to exemplify innovative housing solutions for an ageing population. Recognised by government and industry as a leading 'ideas lab' on specialist/supported housing, our online and regional networked activities, and consultancy services:

- connect people, ideas and resources to inform and improve the range of housing that enables older and disabled people to live independently in a home of their choice
- provide insight and intelligence on latest funding, research, policy and practice to support sector learning and improvement
- showcase what's best in specialist/supported housing and feature innovative projects and services that demonstrate how lives of people have been transformed, and
- support commissioners and providers to review their existing provision and develop, test out and deliver solutions so that they are best placed to respond to their customers' changing needs and aspirations.

Access a selection of related resources on the Housing LIN's dedicated OT pages at:

<https://www.housinglin.org.uk/Topics/browse/Design-building/occupational-therapy/>

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