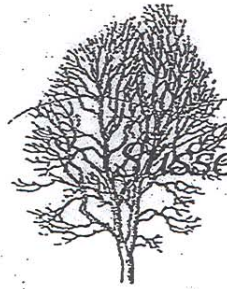


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**PERSONAL CHOICE IN
SHELTERED/RETIREMENT HOUSING**

A WORKSHOP

**University of Sussex, Brighton
Friday 26th September 2008
10.00am – 4.00pm**

REPORT

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PERSONAL CHOICE – WHAT CHOICE?

By Peter Lloyd

Personal Choice – of publicly funded services – is high on the Government's agenda. We may choose schools for our children, a hospital for our operation. Thus we should be able to choose the care and support we wish, select a provider and control its delivery. But what impact will this have on sheltered and retirement housing? As yet, it does not seem to have become a major issue. Some however predict that it will soon become the most significant challenge since the introduction of Supporting People funding over five years ago.

My article in the July/August 2008 issue (no. 022-p18) of Property People Focus set out an agenda for our SGN September Workshop. In this article I summarise some of our conclusions.

In the workshop we explored two modes by which personal choice might be exercised – personal budgets and a service menu.

Personal Budgets

West Sussex had been chosen as one of thirteen sites for a pilot project to develop the introduction of Personal/Individual budgets or self directed support (the terms seem interchangeable). West Sussex was to focus on services to older people. The pilot ran from January 2006 to December 2007.

The pilot stage has now been completed and, to date, some 900 people have taken personal budgets – though none apparently in sheltered housing; this seems to have been fortuitous and not by design.

Ruth Corden, Project Manager, led us through the processes involved. After an initial meeting to establish that the applicant would be eligible for public support – ie: high needs, low income etc – they were invited to complete (with the help of family, carers, social worker) a very detailed self assessment document in which they described their perceived needs, how these might be met and the outcomes they anticipated. Support currently received was also noted and carers were invited to detail their own input and needs for support. Then followed a period of negotiation and the establishment of a care package. Some individuals have decided to manage the financing of the package themselves, others have chosen to have a Managed Individual Account operated by the local authority.

Personal budgets can draw upon a wider range of funding than the forerunner Direct Payment system – though in West Sussex most has come from Adult Social Services and Supporting People. They also widen the means by which support might be provided – a cruise rather than formal respite care! In such circumstances outcomes can become difficult to measure precisely.

Ruth presented three case studies which dramatically illustrated the complexity and innovativeness of the packages designed. Recipients have greatly appreciated the control and independence facilitated by the scheme.

In response Peter Huntbach, Older Peoples Housing Manager, Brighton and Hove CC, outlined some of the opportunities and risks presented to sheltered housing. Scheme managers could find a role in arranging support packages. Residents might pool their budgets to pay for some of the scheme managers' services. Most importantly, schemes could offer services to those living in the neighbouring community – outreach services such as a morning call or visit or activities within a scheme which served some of the roles of day

centres. (Residents could play an active part in organising such activities). But in so doing they would be competing with services provided by the private sector or voluntary organisations; they would need to be good! They would need to cost their services accurately.

But there are risks too. Scheme income could be drastically reduced if personal budget funding replaced the block contracts to schemes. Who would pay for the myriad of "preventative" services provided by the scheme manager? Controlling their own budgets, residents could be more demanding – the image held of leaseholder residents. The closure of local authority day centres as their clients sought services elsewhere could well be replicated in sheltered housing.

A Menu of Services

Dave Morris, until recently Older People's Support Services Manager in North Somerset Housing and now Supported Housing Project Manager of Homes in Sedgemoor, described the menu system that he has developed for each of these landlords.

Residents were given a questionnaire (in North Somerset) in which they outlined the areas in which they felt they needed support; prominent in the results were help with income and finances, with health care, with adaptations and improvements. They then chose between three levels of support – low level: alarm only and a six monthly visit to assess needs; medium level: up to two visits a week and between one and three intercom calls; high level: up to three visits a week and one or two intercom calls. The aim is to be flexible and fit into residents' daily routines. The service charges were low level menu £4 weekly, medium level £12 and high level £20.

It had been estimated that 30% of residents would choose the low level menu and 20% would choose the high level menu. In fact nearly two thirds chose the low level and only 5% the high level. Such figures provide ammunition for those critical of sheltered housing who argue that many (most?) residents do not need or want the support provided.

Low level choosers apparently included not only those who felt fit and active and thus in no need of support (though they might need more help later) but also those with adequate family support – why have a morning call from the scheme manager when one phones one children daily?

Sheltered schemes retain their manager; residents may change their support level at any time and continue to enjoy a programme of social activities.

The menu system holds obvious attractions for funders – they see exactly where their money is going – only to the most needy. Residents do not pay for services they do not feel they want.

The outcome of these projects suggest a lack of congruity between what sheltered housing is assumed to provide – low level preventative care for those at risk from sudden crises (falls, heart attacks, etc) or from loneliness leading to depression and self neglect, and the actual composition of residents – the majority seeking minimal support. Sheltered housing has always argued for a balanced community with the active organising activities and providing personal support for the frail.

The menu system suggests either that the scheme manager will have much spare capacity for outreach services, or might well be replaced by floating support workers.

Residents continually claim that the most important benefit of sheltered housing is the feeling of security it engenders. This is, indeed, recognised by many landlords – eg: Anchor Trust whose mission statement Anchor 2020 was reviewed in Property People Focus, September 2008 (No 023, pp 18-19). The building is safe, maintenance is taken care of, a good neighbour scheme manager is always available, other residents provide companionship. Much of a scheme manager's daily time is taken up by ad hoc requests from residents – for advice or emergency hands-on support when unwell. Will this continue to be available to residents – and if so how will it be paid for? Aura Hargreaves' account of John in the September 2008 issue of Property People Focus (No 023, pp 14-15) dramatically illustrates what might happen even with a minimal level of monitoring – the sudden decline into dementia goes unrecognised or a sudden death within a flat is not discovered for several days. Residents *chose* to enter sheltered housing in order that they should not experience such a fate.

Residents have been vocal in expressing what they want from sheltered housing – and this usually includes a scheme manager (or small team) responsible for their scheme – well known to them and easily accessible. Is this a choice that is being denied to them? Can one choose only those items on the menu?

This Report of the Workshop was prepared for the November issue of Property People Focus. Sadly Property People ceased publication with the October issue. I am therefore sending a copy to all participants at the Workshop.

PCL