Toolkit for place-based plans for housing for older adults: introduction, vision, and co-production

Background

In 2021 SCIE published the findings from the <u>Commission on the Role of Housing in the Future of Care and Support</u>, whose aim was to ensure that older adults have a range of housing options, to suit their needs at the time that they need it. The report included a roadmap, with the following immediate priority for local areas, that they should:

> "... produce a single place-based plan for housing with care and support for older people which is shaped by the local authority, the NHS, local planning authorities, other local partners, and people who draw on care and support."

These local plans will help local areas to better understand where they are now in relation to housing options for older adults, where they would like to be, and identify their next steps and priorities in order to get there.

The <u>2021 Adult Social Care White Paper</u> emphasised the importance of housing in relation to health and social care in relation to policy making, stating that "every decision about care is also a decision about housing" and that people should have a good choice of alternative housing and support options. The White Paper specifically states that the government will "enable all local areas to agree a plan embedding housing in broader health and care strategies, including investing in jointly commissioned services", highlighting that housing that better meets future care and support needs cannot be achieved by the adult social care system alone.

While the national policy context in relation to general housing and housing with care and support has not moved forward in the way set out in the 2021 White Paper, the need to support local areas with their vision and planning, is still regarded as pivotal to enabling older adults to live in housing that meets their needs and preferences. In May 2023, the Government launched the Older People's Housing taskforce and it is due to report in the summer of 2024. The taskforce are considering what more Government, Local Authorities, developers and others can do to support housing for older people that promotes wellbeing and creates age friendly communities.

This toolkit is funded by DHSC and is designed to support local areas, strategically and methodically, in thinking about and creating their plans for housing for older adults.
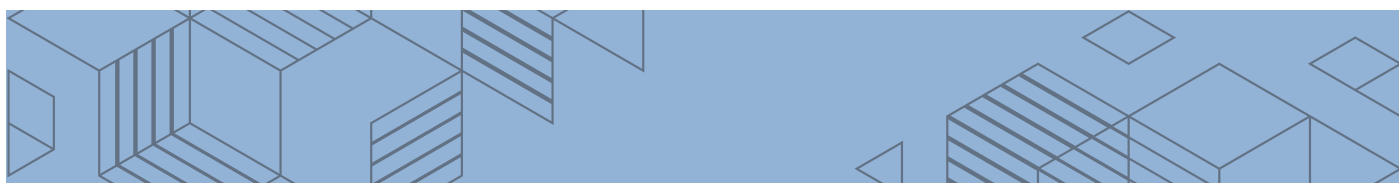
Housing options specifically for older adults

Age-restricted general market housing: This type of housing is generally for people aged 55 and over. It may include some shared amenities such as communal gardens but does not include support or care services. (Typically, C3 planning designation.)

Housing with care and support: Refers to all housing for older adults outside of general housing. For more information about the most common of these housing types along with some example please see here. A short description of each is given below:

- **Housing with care integrated retirement community/extra care:** People live in their own purpose-built, self-contained household, while having the option to access care and meals on-site. Care is provided by staff who are available 24 hours. A range of communal facilities may be available including a café, lounges and gardens.

- **Retirement living/sheltered housing/housing with support:** This usually consists of purpose-built flats or bungalows with limited communal facilities such as a lounge, laundry room and guest room. It does not generally provide care services, but provides some support such as 24-hour on-site assistance (alarm) and a warden or house manager.

- **Co-housing:** Residents create and run their community, share activities, and regularly eat together. Residents have their own self-contained homes and private spaces alongside a strong focus on living communally, with shared spaces a defining characteristic.

- **Shared Lives and Homeshare:** The Shared Lives scheme matches people who need care and support with an approved carer. The carer shares their family and community life and gives care and support to the person with care needs. Homeshare matches someone who needs some help to live independently in their own home (householders) with someone who has a housing need (homesharer). In return for low-cost accommodation the homesharer provides a minimum of 10 hours of support per week.

⚙❓ How to use the toolkit

This toolkit is designed to be flexible around the needs, context and existing strategies, policies and structures within a local area. It can be taken as a whole or different steps can be used to guide individual activities.

Population or housing types
Local areas should decide which population they will focus on. While the main intention for the toolkit is for it to be inclusive of all older adults in a local area, with a focus on those who draw on some form of care and support, it could be used to encompass all adults who draw on care and support or a sub-group within that. Some local areas have focussed on a particular demographic, or housing types (for example, extra care only) and created narrower plans. The toolkit should be used for the groups and housing types that are most helpful to that area.

Steps
The steps outlined are those identified as needed to create an outward facing business plan for a local area that will enable organisations and funders to understand the key needs and attributes of a local area in relation to housing for older adults and what the priorities and expectations are of that local authority. An outward facing business plan should facilitate the engagement of organisations and funders and provide them with the information they need to guide decisions about potential investment. We highlight which steps relate to which section of a business plan and vice versa.
It may be that a full business plan is not yet achievable, but a combination of steps will still provide helpful insights to guide and prioritise local activities. Local areas should dip into the toolkit as they find helpful, using the steps to build on what they already have, or as a way of getting started.

Related strategies and reports
Local authorities, as well as other organisations may already have other related or relevant reports and strategies. The aim is not to try and encompass them all in one plan, but to build on, signpost and make all those involved in a local plan for housing for older adults aware of the range of activities that may be happening across groups and departments.
In the future, one such related activity within local authorities relates to the Supported Housing (Regulatory Oversight) Act 2023 which came into force on 29 August 2023 with a formal consultation expected in 2024. It relates to supported exempt accommodation (supported housing that is exempt from the usual caps of housing benefit level), some of which is housing for older adults. The Act includes obligations on local authorities to develop strategic supported housing plans quantifying existing supply and local need.

From business plan to delivery
This toolkit supports the creation of a business plan and is not a guide for the delivery of that plan. However, by bringing together a housing partnership and developing a business plan, issues in relation to the delivery of that plan will certainly arise. There is an opportunity to be discussing and moving forward with changes within local planning policy and within local health and social care planning that would better support the delivery of the business plan. That will be more likely if the relevant partners have been involved in the planning from the outset.

Getting started – vision and leadership

Introduction

Developing a business plan for housing for older adults, is not something a department can do on their own; it is more effective in terms of delivery and implementation when everyone works together. The Commission for the Role of Housing in the Future of Care and Support identified local housing partnerships as essential for local areas to create an overarching vision and strategic housing plan for older adults, stating that any plan should be "shaped by the local authority, the NHS, local planning authorities, other local partners, and people who draw on care and support".

A housing partnership can:

- Ensure the right people are in the room with the range of expertise needed to develop a robust age-friendly housing strategy.
- Support co-production and shared decision making with older people and the wider community.
- Help identify local data, business intelligence and information held by different partners to avoid duplicating effort.
- Make best use of capacity and funding.
- Ensure buy-in of any plan, greatly enabling the delivery of the vision and plan.

Who could be part of a housing partnership?

Every local area is different, but some of the key groups that should be involved in local plans for housing for older adults are:

- Older people and carers, representative groups, charities and community groups.
- Senior Local Authority (LA) leaders focussed on housing, social care, older adults.
- LA social services, Occupational Therapists, social workers and community workers.
- LA housing and planning departments as well as finance/corporate resources, regeneration and growth or improvement that relates to housing and/or older adults.
- Commissioners, Better Care Fund managers.
- NHS, community health, Occupational Therapists and mental health leads.
- Integrated Care Partnerships and Integrated Care Boards (for information on these see here) or Health and Wellbeing Boards.
- Elected members: County, Borough Parish or Town councillors.
- Builders, planners and architects.
- Social care and community services providers.
- General needs and specialist housing providers (LA, housing associations and commercial operators).
- Developers and housebuilders.
- Grant makers/funders of housing for older people (e.g Homes England, Greater London Authority).

Getting the right people in the room

Bringing together a local housing partnership can be difficult, both to initiate and to sustain. Local areas will already have some joint working and partnerships in place, but these can often be for specific delivery activities rather than wider prioritisation and planning.

To bring an initial group together requires leadership and time to be set aside for relationship building. Joint priorities should be established early so that everyone can see the overall aims and where they or their organisation fits in. Responsibilities and areas of expertise should be established so everyone can see how they can contribute to the business plan and what responsibility they will have.

Developing a long-term vision for the area can mean stepping away from day-to-day delivery pressures. Having a mixed perspective in the room can support people to think creatively about a housing future for the area.

LEADERSHIP

While a local housing partnership is pivotal in developing a housing plan for older adults that meets the needs of the area, leadership is needed to ensure there is support and buy-in at a senior level, including the local authority and the Integrated Care Partnership.

A memorandum of understanding (MOU) could support the setting out of next steps at a senior level and to demonstrate the ambition of any plan and the development of that plan. This could be based on the national 'Improving health and care through the home: MOU'.

CASE STUDY: THE 'SERIOUS GAME' FOR BUILDING A HOUSING PARTNERSHIP

One of the key challenges to building a local housing partnership is building the right network of people who understand the different roles involved in supporting housing for older people. Strategic leadership starts with finding the creative space to strategically plan for the future. One example of a tool that has helped do this is 'Hopetown', a Serious Game facilitated by Socialudo, implementing innovative research led by the University of Stirling. Within the game, players take on different roles, and must negotiate how to use limited resources to maximise the wellbeing of the residents of the fictional Hopetown.

The game is an innovative method to bring together those people in a local area with responsibility for, or stakeholders in, planning of housing options for older adults, and focuses on what could enable them to work together productively. It was piloted in Southwark in October 2023 and the evaluation report can be found here.

Players were a mixture of local authority and wider community stakeholders, and were split into four teams: policy maker, service provider, community group or developer. Each role has a specific aim, but groups must work together if they wish to increase the wellbeing of those in 'Hopetown'. Real life changes are made over the course of the game, prompting group discussion regarding the consequences of the decisions that have been made. This is the primary way in which the game encourages future planning and strategic thinking, generating knowledge on the barriers to resilient ageing in place, and creating a collaborative tool for communities to co-produce solutions.
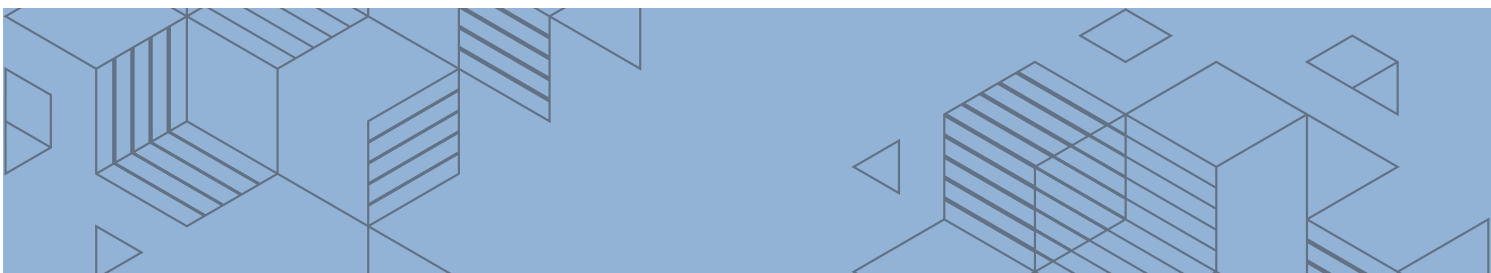
Playing the game can in itself spur on the next steps of developing a housing plan by demonstrating to players:

- The increased need for partnership working between housing, health, and social care sectors.
- The need for more strategic planning for future demographic change including diverse populations.
- The way local decision making can be supported to help make future investment decisions about the accommodation choices for an ageing population.

Playing 'Hopetown' in Southwark emphasised the importance of some key ways of working including partnerships, ways of communicating (and when), joint decision making and co-production. The benefits of housing for older adults to individuals, but more widely to services and the community was reflected in players comments:

"Health, Housing and Care are all in crisis. If we can work together in spectrum from admission end rather than the discharge end for someone, we have longer to plan it."

A video of the 'Hopetown' being played in Southwark can be viewed here.

Co-producing a business case for older people's housing

Introduction

Co-producing a business case will help to ensure that decisions about housing for older adults, priorities and investment opportunities are in line with the needs of the local community. Co-production will benefit the business case by helping the partnership with:

- A better understanding of people's vision, aspirations, and housing needs.
- Understanding new unmet needs previously not identified.
- Increasing the level of buy-in and uptake of the business plan, in particular the housing with care and support developments proposed, thereby facilitating implementation and upscaling.
- Developing a collaborative relationship between partners, customers, and stakeholders that will be key for delivering housing options for older adults.
- As well as the benefits outlined above, co-production will help the partnership navigate the different steps of the toolkit. The guidance supports co-production for each step of the toolkit, and the business case as a whole, and is rooted in SCIE's principles for co-production, presented below.

It is not assumed that those involved in a housing partnership would already be experienced in co-production and may need support and skills development. Similarly, older adults and others in the community who participate in co-production may benefit from additional support with some activities and opportunities to gain skills for them to fully engage and contribute. It may help to view it as a joint journey where no one starts off with all the answers, but everyone is willing to learn.

Principles of co-production

Equality

One of the key benefits of co-producing a business case is to gain insights from and share decision making power with people who are experts in their own housing, care and support needs. Their views are key to the successful delivery of housing options for older adults and their input should have equal weight in deciding the development priorities proposed in the business plan.

Diversity

It is key to ensure that the co-production process is inclusive and that all key groups are represented. All groups should also be able to confidently express their views and the decision-making process should reflect an accurate representation of local people's needs.

Accessibility

It is fundamental to maximise people's involvement and to ensure that individuals feel confident and motivated to fully engage in discussions and decision making. This means ensuring that individuals have the same conditions and opportunities to take part in the process and that barriers are removed. It includes creating a friendly environment, and adapting ways of information sharing and discussion to meet the needs of different groups, thereby facilitating their involvement.

Reciprocity

This is a key concept in co-production and has been defined as ensuring that people benefit from their contributions and builds on people's desire to feel needed and valued. The idea has been linked to 'mutuality' and all parties involved having responsibilities and expectations. Putting reciprocity into practice can help to create a sense of togetherness.

'I' AND 'WE' STATEMENTS

To support the development of the business case for housing for older people, we have outlined a set of statements to highlight the types of co-production outcomes associated with each of the steps. Please note that these statements are illustrative, and we encourage housing partnerships to adapt them as they see fit to best reflect their local context. The statements are divided in to 'I' statements that suggest key outcomes for individuals co-producing the step, and 'We' statements that suggest actions and outcomes to be delivered by the partnership facilitating the development of the business case. This approach is based on TLAP's (Think Local, Act Personal) 'Making it Real' framework that aims to facilitate the personalisation of care and support.

SCIE and TLAP have developed guidance on how to effectively plan and run co-production. This guidance can be helpful to support the co-production of the business case and give insights on how to effectively include people with lived experience in the decision-making process. More details can be found on "Co-production: what it is and how to do it" and summary along with practice examples can be found here.

CO-PRODUCTION EXAMPLES

- SCIE Commission on the role of housing in the future of care and support: Co-production promising practice examples.

- Case study on the development of Flowers House, an Extra Care scheme, that was based on the continued consultation and so-production with residents and their families.

- Putting people at the heart of new housing development: Coproducing the place we call home.

- Taking a collaborative approach to design at The Courtyards in Preston.

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Updated in April 2024

Toolkit available at: https://www.scie.org.uk/housing/toolkit-for-place-based-plans-for-housing-for-older-adults/

Step 1:
Understanding demand

Introduction

The first step is about drawing on existing data and information to understand your local population and current and future demand for housing, particularly for older people. It involves:

- collecting and analysing local demographic, economic, health, social care and housing trends data
- identifying local needs and preferences for housing in later life
- carrying out demand projections for different types of housing.

It is important that the information collected reflects the diversity of the local population, for example different ethnic groups, LGBTQ+ communities, disabled people, people living with dementia and people with visual or hearing impairments.

KEY QUESTIONS

- What do we know about our local population?
- What do we know about trends in housing and living arrangements?
- What is the economic status of the older population and what proportion of older people would be eligible for social and/or means restricted options (e.g. sheltered housing)?
- What do we know about housing needs and preferences?
- What are the projections for local demand for housing?

What will it add?

What will this step add to your business case:
This information will help inform your business case by helping potential investors understand the local context and current and projected demand for different types of housing that meet older people's specific needs, across different localities.

How to?

Outline a demographic overview and socio-economic profile of the local population, focusing particularly on older people. For example, you should highlight age groups, ethnic groups, gender, deprivation, life expectancy, health issues, prevalence of dementia, disability, care and support needs, care and support eligibility status, people who fund their own care and support, and unmet needs, etc. Highlight any relevant differences across different localities in the local area. Outline local projections about population growth, particularly for older people and projected changes in any relevant demographics. You can

draw on resources such as Census data, ONS population projections, Public Health Profiles, local joint strategic needs assessments and ASCOF and SALT datasets available here.

- Identify the number of older people in mainstream housing, tenure types, the number of older people in different types of housing with care and support, the number of older people that are able to afford and/or are eligible for different types of housing with care and support. Consider data on household size and composition, and any information on older people living in unsuitable/non-decent homes. It is important to highlight how this data differs across age groups, gender, ethnic groups, disabled people and any other demographic groups that you think will provide valuable insight. You can also highlight differences across different localities in the local area.

- Identify what is known nationally and locally about what older people value about housing in later life, the factors that may contribute to people moving in later life and people's views on different types of housing, including housing with care and support. You can draw on existing consultations and research with local people and/or national publications.

- Use current and projected populations of older people and employing projection tools and models to identify projected demand for different types of housing. This can be done by using internally developed bespoke models or various existing tools such as Housing for Older People Supply Recommendations (HOPSR).

SOURCES OF INFORMATION AND RESOURCES

- ASCOF, SALT, ASCFR datasets, Census 2021 data, ONS population projections, Public Health Profiles, English Housing Survey, Indices of Multiple Deprivation.

- Joint strategic needs assessments, joint health and wellbeing strategies, local adult social care strategy, local housing strategies for older people, local plan, housing needs assessments, local planning policies.

- Any existing consultations or research with local people, anecdotal feedback from service user involvement groups, and nationally published reports about people's needs and preferences for housing in later life.

- LGA: Housing our aging population, ARCO: Coming of Age Better: housing options for older people.

- Housing for Older People Supply Recommendations (HOPSR), More Choice, Greater Voice, Projecting Older People Population Information (POPPI); Projecting Adult Needs and Service Information (PANSI).
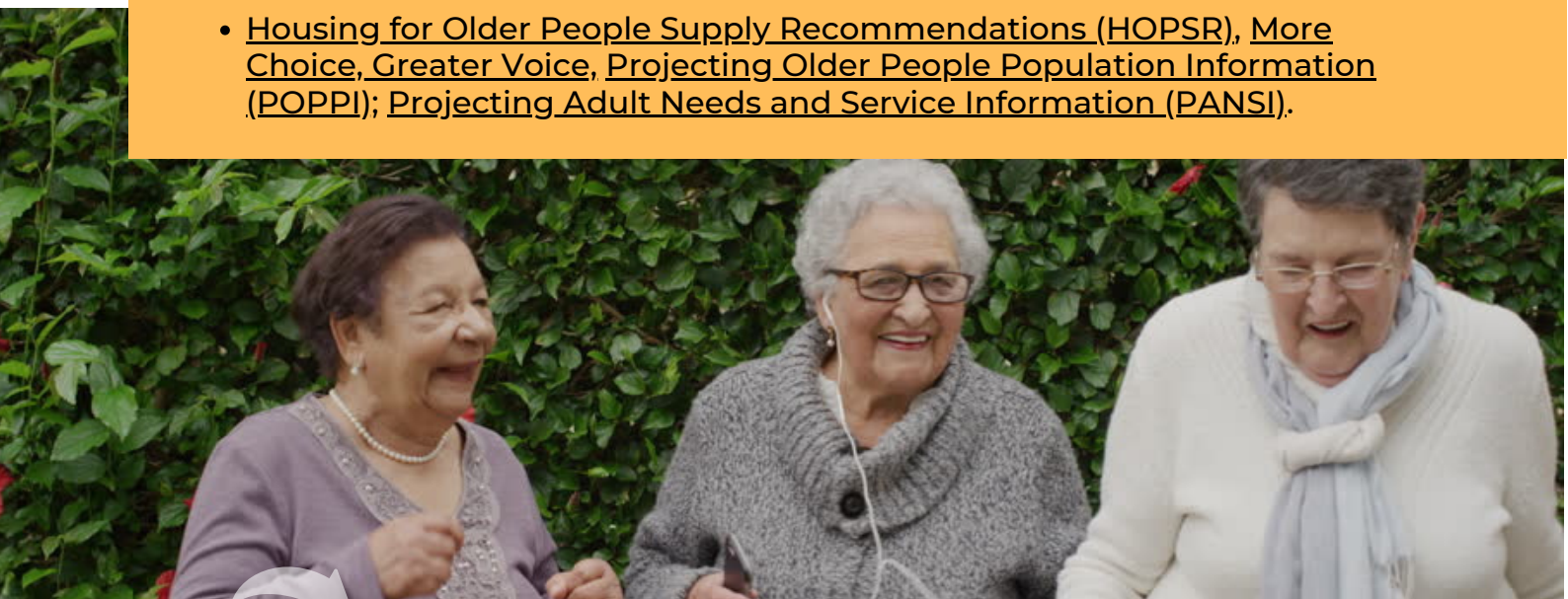
PARTNERS TO INVOLVE

Partners for this step can both identify and agree the types of information that are needed and help identify relevant data that organisations collect but others may not be aware of. It is also important to involve partners with the necessary skills to conduct the analysis described above, whether these are local authority staff or commissioning organisations that specialise in demographic analysis.

- Local authority service managers and commissioners across adult social care, housing, data and research.
- Integrated Care Partnership, local Healthwatch, housing associations.
- Local older people's forum, representative groups, charities and community groups, particularly organisations representing or working with older people, e.g. Age UK, carer organisations.

TIPS ON CO-PRODUCTION

The 'I' and 'We' statements below are illustrative examples of co-production outcomes associated with this step. We encourage housing partnerships to adapt them as they see fit to best reflect their local context.

For individuals:

- I describe the local housing needs and preferences for older people.
- I help decide what type of demographic information and data should be prioritised to understand our local population.
- I help define projections of future change in population demographics and say what impact these changes will have in housing for older people.

For the partnership:

- We have conversations to hear about key information that local people would like to have to better understand housing demand.
- We make the information and data to be gathered and analysed accessible to individuals and facilitate their engagement in the decision-making process.
- We share information and data about population and demographic projections in accessible ways and involve individuals in defining projections of change and the impact of this on housing for older people.
- Further information about the benefits of and principles of co-production, as well as examples of co-production in the housing sector can be found here.

Central Bedfordshire – demand projection

Central Bedfordshire developed their own local framework to establish the need for specialist housing schemes for older people over a 20-year plan period (2015-2035). Whilst, other tools exist, they only provide standardised rates for estimating demand for specialist older person housing and do not take into account local data. To develop this local framework Central Bedfordshire used their Strategic Housing Market Assessment (SHMA) household projections, and data collected from a survey about the proportion of households planning to move and likely to choose this type of housing. They used the Elderly Accommodation Council's approach of separating housing into two forms of provision: housing with support (including sheltered housing) and housing with care (including extra care). Central Bedfordshire identified:

- The likely need for specialist older person housing with support.
- The likely need for specialist older person housing with care.
- The likely need for specialist older person housing overall.

To further support effective planning decisions, Central Bedfordshire then went on to break down the need for owner-occupied homes and rented homes under each category and calculate housing need at a CCG locality level using parish level data from the 2011 Census.

Using a local framework made a difference. The local framework identified lower levels of need for both housing with support and housing with care than when the standardised approaches were used, in this case 'More Choice, Greater Voice' and SHOP (Strategic Housing for Older People Analysis Tool).

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Step 2: Map current provision of housing for older adults

Introduction

This step will support you to provide an overview of the current local housing capacity for older adults across different types of housing with care and support and including general housing if that is a part of your housing plan. This is part of understanding whether current housing meets current need and to what extent is it likely to meet future needs. This will help you to identify unmet demand.

What will it add?

- A summary of current figures of housing provision for older people highlighting, priority areas, types of housing offered, and unmet needs.
- Future projections of housing provision based on local market drivers, demographic projections, and local plans to expand and encourage investment in the area.

KEY QUESTIONS

- How much housing for older people is there in your local area? How many units of each type of housing for older people is available?
- How does the provision compare with the demand? Is there enough housing available for older people? Is there a range of both housing and tenure types and do they match people's preferences and needs? What are the gaps?
- How many units of housing for older people are made available each year?
- Is the housing provision likely to be reduced, stay the same, or increase over the coming years? What are the drivers for change? Are there any established targets for expanding the provision?
- What are the gaps in provision? What are the areas and types of housing that most need investment to increase provision?
- What has worked locally and what has not? For example, which schemes are popular, and which are less so? Are there private schemes with poor resale values?

How to?

- Identify the current figures of units of housing for older people available in your locality.
  - Break it down by type of housing available. See here for a short overview of housing types.
  - Where possible, identify the availability of different housing and tenure types, as well as purchase cost (if applicable) and monthly costs to residents. This will help identify if some housing types are only available to some groups.

- Break it down by local areas and provide a geographical overview of the provision. This will help to identify geographical priorities.
- Compare the current provision with local demand (step 1) to identify any current and future gaps in provision.
  - Consider the different types of housing needed to match older people's specific needs, income, affordability and eligibility for different types of housing.
  - Consider how current and future provision reflect the diversity of the local population, for example different ethnic groups, LGBTQ+ communities, disabled people, people living with dementia and people with visual or hearing impairments.
  - Identify regions and local needs to be prioritised.
- Identify past and current trends in development, highlighting the number of units of housing made available each year.
- Based on recent trends in developments, those developments already in the pipeline and what is already known about the local market, estimate the likely future growth in housing provision.
  - Consider to what extend the demand projections identified in Step 1 are likely to be met by the estimated future growth.
  - Include any local strategy, vision, or plans to set a target number of housing for older people to be developed in the future.
- Identify the gaps in provision and highlight key opportunities for investment.
  - Highlight the types and tenures of housing to be prioritised based on local needs and current gaps.
  - Explore wider alternatives and consider types of housing not traditionally used in your local area to improve housing options (Step 6).

SOURCES OF INFORMATION AND RESOURCES

- Current figures of housing provision for older people – number of units delivered over the past years. Ideally organised by housing type, builder, and operator.
- Strategic plans and policies with relevant information on plans to influence future housing provision, including target numbers to be achieved.
- Joint strategic needs assessments, joint health and wellbeing strategies, local adult social care strategy, housing needs assessments, local planning policies.
- Summary of housing demand for older people (from step 1) to be compared to current and future provision, identifying areas and types of housing that most need increased provision.
- Summary of resale values in owner-occupied schemes (Land Registry).
- Interviews with residents in local schemes.

PARTNERS TO INVOLVE

It is highly likely that no single group or body will hold the range of information needed or will be able to interpret the data that is held. Working across teams and with skilled data analysts is therefore essential to make best use of existing data.

- Local authority staff from planning and regeneration teams.
- Strategic housing, planning, and social care policy teams.
- Housing advice and homelessness.
- Allocations/lettings, property services/surveyors.
- Accessible housing register teams.
- Specialist teams, for example, tenancy support/independent living/outreach and community services.
- General and specialist housing associations.
- Trade bodies for operators of older people's housing, such as ARCO.
- Data providers, such as the Elderly Accommodation Council (EAC).

TIPS ON CO-PRODUCTION

The 'I' and 'We' statements below are illustrative examples of co-production outcomes associated with this step. We encourage housing partnerships to adapt them as they see fit to best reflect their local context.

For individuals:

- I say what is working well, what needs to be improved, and the gaps in provision of housing for older people.
- I help decide what factors are most important to understand provision of housing for older people.
- I have access to information on the current housing provision and so I can contribute to decision making about priorities.

For the partnership:

- We have conversations with and take on board individuals' views on the state and scale of current provision of housing for older people.
- We make information accessible and available, facilitate individuals' understanding, and support them in deciding the key priorities for housing provision for older people.

Further information about the benefits and principles of co-production, as well as examples of co-production in the housing sector can be found here.

The Greater Manchester Combined Authority developed their <u>Framework for Creating Age-Friendly Homes in Greater Manchester (2021-2024)</u>, presenting a detailed overview of the current and future demand and provision of housing for older people. This informed their vision and strategy for developing age friendly homes in the coming years. The evidence base for the framework is formed by data drawn from the <u>Greater Manchester Strategic Housing Market Assessment</u>, <u>State of Ageing</u> (Centre for Ageing Better, 2020), <u>One year on the impact of COVID-19 on the lives of people approaching later life</u> (Centre for Ageing Better, 2021), Good Home Inquiry (Centre for Ageing Better, 2021, <u>Ipsos MORI</u>, and <u>English Housing Survey</u>. Utilising a mix of local and national sources, the framework compares projections of demand and provision to assess key priorities and define an agenda that speaks to current and future gaps in the provision of housing for older people. The data analysis generated evidence statements that informed the framework, including:

- 454,000 residents of Greater Manchester are over the age of 65 and by 2024, residents age 50+ will exceed 1 million.

- By 2035, 3 in 20 Greater Manchester residents will be 75 years or older. Between 2018 and 2043 the 75-84 age group is projected to rise by 57.3%; almost 1 in 3 will have a long-term illness that limits day-to-day activities 'a lot'; just under 8% will be living with dementia.

- Nationally, 18% of homes are officially classed as non-decent; over half of homes in need of improvements are headed by an adult over 55.

- English Housing Survey suggests 27% of private rental sector homes do not meet the Decent Homes Standard, given the ageing profile of private rental stock in Greater Manchester it is likely conditions may be worse.

- Nationally, 9% of current housing stock meets the most basic standard of accessibility.

Based on the evidence base, the framework outlines five themes to shape the local agenda for the years 2021-2024 to improve the housing offer. The themes are:

- Embedding ageing in all our housing strategy and delivery.

- Resetting the conversation, 'valuable not vulnerable'.

- Making an impact on the ground.

- Promoting 'Improve or Move'.

- Celebrating homes and neighbourhoods that enable people to live well in later life.

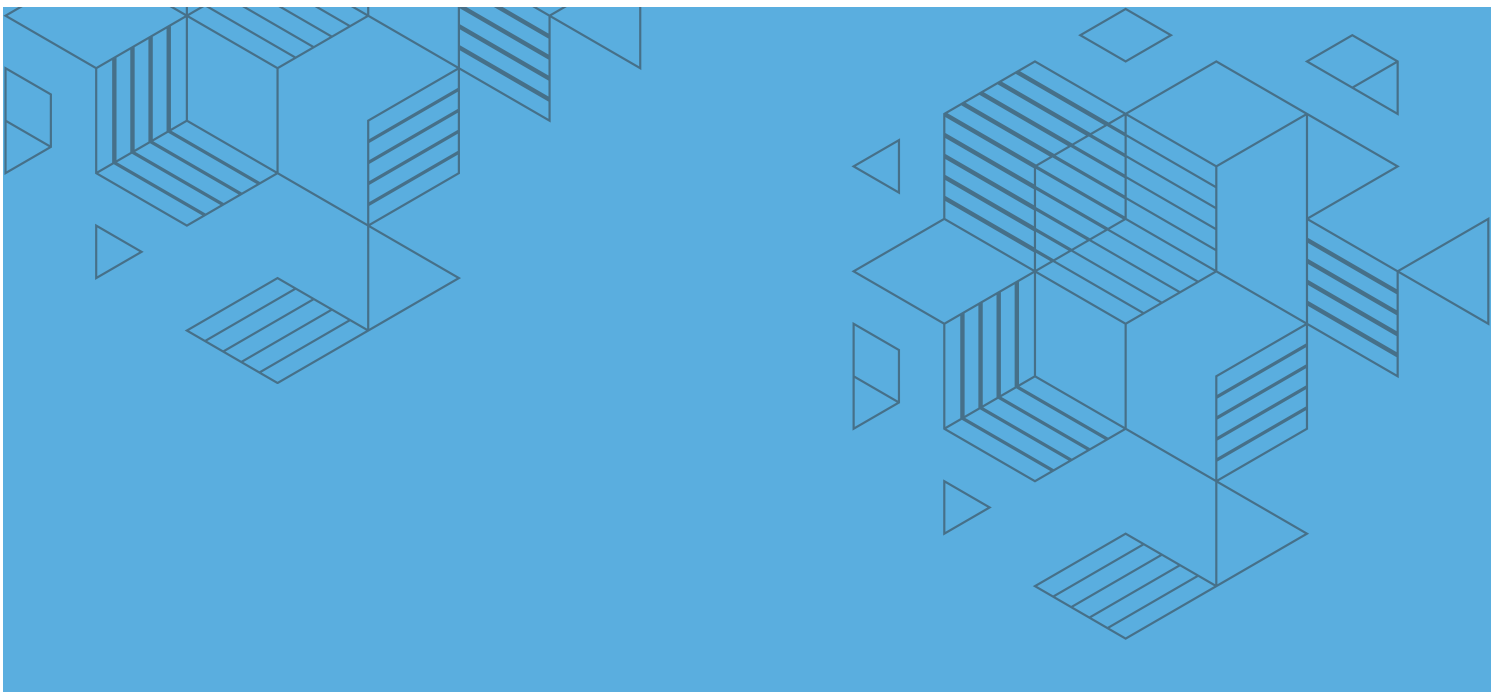Please see the <u>Framework for Creating Age-Friendly Homes in Greater Manchester</u>, for further details.

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Toolkit available at: https://www.scie.org.uk/housing/toolkit-for-place-based-plans-for-housing-for-older-adults/

Step 3: Understand the local market

Introduction

This step will support you to provide an overview of the organisations and factors influencing the local housing market costs and affordability and how this relates to housing options for older adults. Having found out about what the local housing provision for older adults is (in step 2), this step helps to understand why that is, and what are the key issues impacting on the future housing pipeline. These should help any potential investors to understand how the market operates, how they would fit in that market, and identify opportunities for investment.

What will it add?

- A description of the local market for housing for older people with an overview of factors driving the local market, affordability, scope for innovation, and opportunities for investment.

- It will start to highlight some of the benefits of investing in the locality based on opportunities offered in the local market. Benefits are further explored in step 7 – 'costs and benefits', and step 10 – 'social values'.

KEY QUESTIONS

- Has your local authority created a local development plan? What are the plans for developing the local economy that could relate to housing and/or social care? Are there specific plans for housing and/or an ageing friendly community?

- What are the key economic drivers that have influenced the local housing market? Have they improved over the years, what are the positives?

- Consider affordability (rent/purchase price, monthly management fees/service charges), population demographic (step 1), housing prices, rent levels, access to finance, and key drivers of the local and national economy.

- What is the profile of the market, both social and private? What types of organisations and products are currently available for different housing types, and where are the gaps? These gaps may then be priorities for investment.

- What is the scope for innovation and 'future proofing' new and existing development so that fewer people need to move out of their home if their health or mobility changes?

How to?

- Highlight the advantages and support offered to developers and investors by the local authority and local partners identified in any local development plan, business plan, or housing strategy.
  - Consider support to mitigate risks of market constraints - such as land availability, lack of large sites that enable scale, and planning policies and practices.
- Highlight any economic growth measured in the past years. If available, present projections of growth forecasted as well as local authorities' investment plans and economy stimulus strategies relevant to the housing sector.
- Summarise key information on the local economy and housing affordability such as average house price, level of support needed, local incomes of older people, running costs, local affordability ratios, size of the market based on demographics, and income disparity across the local area including comparing rural and urban areas where relevant.
- Identify the scope and current priorities for housing innovation to better support the older population (link this with steps 1 and 4).
  - Consider architecture and design, building materials and efficiency, facilities and functionality, support approaches, and tech enable care approaches.

SOURCES OF INFORMATION AND RESOURCES

- Existing local documents: Strategic Housing Market Assessment, Market Position Statements, Housing and Social Care local strategies.
- Local Government Association – Understanding the Local Housing Markets.
- Office for National Statistics - Property price, private rent and household statistics.
- Office for National Statistics - House price statistics for small areas in England and Wales.
- Cambridge Centre for Housing & Planning Research – Understanding supply, demand and investment in the market for retirement housing communities in England.
- DWP data on older recipients of disability benefits in a local authority area.

PARTNERS TO INVOLVE

It is highly likely that no single group or body will hold the range of information needed or will be able to interpret the data that is held. Working across teams and with skilled data analysts will make best use of existing data.

- Local authority staff from commissioning, planning, and regeneration teams.
- Strategic housing and social care policy teams.
- Allocations/lettings, property services/surveyors.
- Accessible housing register teams.
- Specialist teams, for example, tenancy support/independent living/outreach and community services.
- Housing associations, particularly those with housing for older adults.
- Trade bodies such as ARCO.
- National data providers on older people's housing, such as the Elderly Accommodation Council (EAC).
- NHS, Integrated Care Partnerships and Better Care Fund managers.

TIPS ON CO-PRODUCTION

The 'I' and 'We' statements below are illustrative examples of co-production outcomes associated with this step. We encourage housing partnerships to adapt them as they see fit to best reflect their local context.

For individuals:

- I say how local housing market factors influence my experience of accessing housing, highlighting the factors that have most impact on my individual experience, e.g. affordability, options available, and quality of provision.
- I say what are the most significant factors that should be prioritised to understand and describe the local market.
- I describe my views of and experiences with the different local organisations developing and delivering different types of housing for older people.

For the partnership:

- We make information accessible and facilitate individuals' understanding of key local market drivers. We highlight how these factors can influence their lives, particularly their access to different types of housing.
- We have conversations and take on board individuals' views on the most significant factors that impact on their experience of accessing housing, as well as their experiences with local housing organisations.

Further information about the benefits and principles of co-production, as well as examples of co-production in the housing sector can be found here.

EXAMPLES OF LOCAL CONSTRAINTS TO HOUSING FOR OLDER PEOPLE

The <u>Cambridge Centre for Housing & Planning Research (2021)</u> identified some common constraints to development within local areas that can significantly impact the provision of housing for older people and are often considered one of the key drivers for undersupply of housing for older people. According to ARCO, 11% of planning applications for developing new retirement housing schemes submitted to local authorities did not reach the development stage due to local market constraints. Key constraints identified by the research included:

- A lack of suitable sites for retirement housing.
- Difficulty competing with other land uses when bidding for land.
- National legislation and nationwide planning considerations, including the need for consistency between local planning authorities in planning use classes for retirement housing.
- Local planning policies and practices, including assessments of need and the creation of local plans.

Additionally, the report highlights the challenges that developers face regarding the inconsistency of planning frameworks used by different local authorities generating disputes about planning obligations and adding challenges to the development process.

This highlights the importance of understanding the local market, including its specific constraints, and promoting any local support available to developers and investors in identifying and mitigating such risks to the development process.

For further information, access the publication: <u>Understanding supply, demand and investment in the market for retirement housing communities in England</u>.
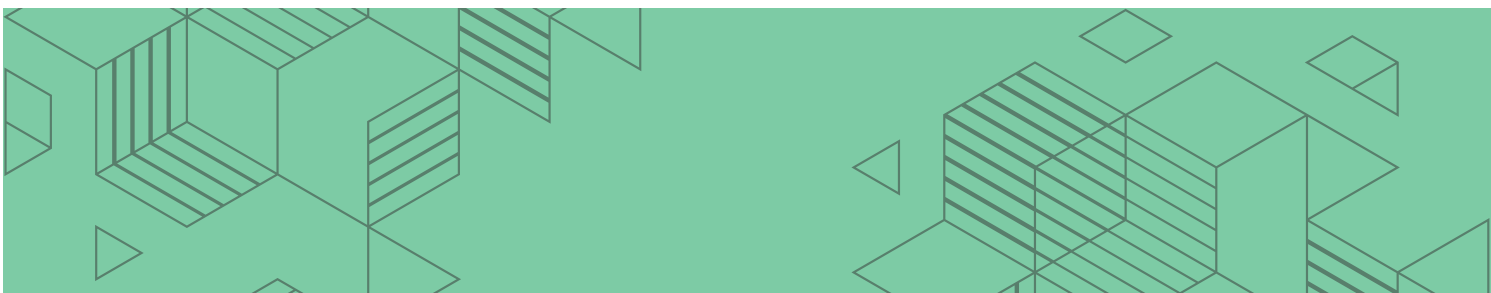
Step 4: Identifying older people's preferences and needs

Introduction

This step will support you in conducting research into what local people want from housing for older people, including their financial circumstances, fears, and preferences. It will help you to develop a business case that speaks to people's needs and preferences, increasing uptake and reducing investment risks.

What will it add?

- A detailed profile of people, including their circumstances and preferences around housing for older people to support you to prioritise the right mix of housing options in your locality.

KEY QUESTIONS

- What are the key demographic characteristics in your locality? (Information from step 1 can support this).
- Are there any groups of older people (based on ethnicity, gender, sexual orientation, gender identity, economic background) in your locality that face challenges accessing housing services and/or other local services? Ensuring these groups are included is key to developing a plan that is fully inclusive and supports diversity.
- What is the focus of the research in your area? Consider the topics, groups, and localities to be prioritised.
- What are people's housing preferences and needs? Consider space (living spaces to sit, eat, sleep, receive guests, enjoy hobbies), location (transport links, facilities, community), design (accessibility, functionality and efficiency, attractive, atmospheric), tenure (ownership or rent), and availability of services.
- What is the approach to be adopted? Will it be undertaken internally, or will it be commissioned? Consider the scale and methods to be adopted.

How to?

- Establish the key areas that the research needs to focus on. This may include housing needs, health and social care support needed, demographic information, economic profile, geographical preferences.
  - Define the groups of people to be included, using criteria such as age and locality for example. Consider how diverse groups can be included to ensure that all local communities are represented in the data.

- Research into the housing needs and preferences if older people can be undertaken in different ways. Surveys, questionnaires, interviews (face-to-face, via telephone, or online) and small-group workshops or focus groups, are the most common methods. Consider an outreach approach visiting places, running engagement events and working in partnership with community organisations.
- In many cases, local authorities and local partnerships opt to commission an independent organisation to undertake the research. While this can be beneficial in terms of expertise needed and impartiality of the results, smaller scale research can be conducted internally if necessary and may offer other advantages. Either way, it is important to define an approach and a plan of action.
- Topics to be explored in the research may include:
  - Current housing - type of housing, if people are living alone or sharing, size, adequate number of rooms, outside areas.
  - Housing design and community preferences and needs – what people value in their house and in the wider community, where they want to live and with whom. What infrastructure and opportunities for socialisation do they need and what current and future hobbies and activities do they aspire.
  - Health and mobility – including level and types of support needed and if their current housing supports their health and mobility.
  - Economic circumstances – affordability, access to finance and funding, housing tenure.
  - Sustainability – energy efficiency, comfortable temperature in summer and winter, adaptable to support future changes in health and mobility.
  - Home improvements and moving intention – plans to refurbish and improve their current home, plans to undertake adaptations to improve accessibility and independence, plans to downsize or upsize.
  - Understanding people's views on different housing options. Many people might not be aware of the range of housing options and the differences between them and so will need accessible information about this. This could include the benefits for each of the housing types as well as common concerns.
  - Work with community groups on topics for specific groups of older adults. For example there may be some additional or different topics to discuss with LGBTQ+ older adults, and these questions can be designed with those groups.
- Consider how the information collected will be processed and presented in the business case. Look for highlights and trends that represents people's needs and preferences and give potential investors an overview of the local tendency on housing for older people.
- Research needs to be designed, analysed and interpreted in the context of the local housing market and the different groups being consulted. More specifically, it is important to be aware that people in different age groups are likely to have different views on different types of housing for older people, based on their current preferences and this may not accurately reflect future demand.
- Consider how you will feed back the findings from the research to the participants and highlight how the information gathered is going to be used.

SOURCES OF INFORMATION AND RESOURCES

- Toolkit and guide to planning heathier places and creating technical research papers in consultation with people.

- Example of strategic housing market assessment applied to a housing strategy: Kirklees Strategic Housing Market Assessment.

- Population survey questions and responses for the Commission on the Role of Housing Example in the Future of Care and Support. Includes accessible descriptors of five housing options, level of awareness and perceived advantages and disadvantages of each type.

- AgeScotland's 2023 housing survey.

- Example of approach used to understand residents needs with respect to maintaining and improving their homes: Centre for Ageing Better, Putting ideas into action: Developing a local Good Home Hub.

- Centre for Ageing Better, Finding the right place to grow older: A toolkit for engaging residents in a discussion about their housing preferences and local communities.

- Local Government Association, Developing customer insight.

- Housing LIN CollaborAGE, Directory of community led approaches.

PARTNERS TO INVOLVE

- Local older people's representative groups, charities and community groups.

- Local authority (LA) community engagement and participation teams, customer insight teams, and allocations/lettings, property services/surveyors.

- LA leaders focussed on social care and older adults.

- General and specialist housing associations and social care providers.

- Integrated Care Partnerships, community health, Occupational Therapists and mental health leads.

TIPS ON CO-PRODUCTION

The 'I' and 'We' statements below are illustrative examples of co-production outcomes associated with this step. We encourage housing partnerships to adapt them as they see fit to best reflect their local context.

For individuals:

- I define the key areas and topics to be covered by the research.
- I support the development of the questions to be asked to ensure they are easy to understand.
- I help decide which research approaches will work best with different groups and the important factors to consider for each approach (surveys, interviews, focus groups).
- I say what groups need to be consulted with and say how to make the process inclusive and accessible.

For the partnership:

- We facilitate individuals' understanding of the research process and take on board their views on the key areas to be covered.
- We design the methodology and the questions with individuals taking into consideration their views on what should be prioritised with different groups.
- We develop an inclusive approach based on individuals' views on who should be included and how.

Further information about the benefits of and principles of co-production, as well as examples of co-production in the housing sector can be found here.

CASE STUDY

To inform the delivery of mainstream and specialist housing, Kirklees Council developed the Housing Needs and Preferences Study, published in 2022. Conducted by Housing Learning and Improvement Network the study used a range of methods to engage with approximately 500 people from ethnic minority backgrounds aged 45 and over. The research methods included:

- Quantitative research - analysis of local data available to better understand the current and future housing and support needs of the older ethnic minority population including a demographic projection of the older ethnic minority population in the short, medium, and longer term.

- Qualitative research - engagement with older people from ethnic minority backgrounds through focus groups, targeted interviews, and online and paper-based surveys.

The findings provided an overview of current circumstances and needs and preferences of older people from ethnic minority backgrounds including the following themes:

- Current living arrangements - places of origin, housing suitability, specific cultural and religious needs, and challenges faced.
- Need for adaptations - types of adaptation and need for support and advice.
- Propensity to move home - proportion of people considering moving, types of housing needed, downsizing and rightsizing needs, location preferences.
- Factors influence the desire to move home - reducing costs, properties suitable for multigenerational living, preferences to live close to family.
- Important characteristics of home – enabling independent living, number of bedrooms, Wi-Fi, transport, and being near to people of the same culture.
- Barriers to moving home – affordability, lack of suitable housing available.
- Tenure preferences – proportion of people owning and renting properties, intention to buy, and tenure preferences.
- View about specialist housing for older people – understanding of options available, lack of options for cultural and religious competent services, stigma.
- Affordability – levels of affordability and concerns about financial security.
- Support services – changes to family support for older adults, incidence of early onset of dementia, access to culturally appropriate amenities.

Based on the findings the report outlines a range of recommendations to improve places, provide adequate support to older people from ethnic minority backgrounds, and improve services.

For further full recommendations, findings, and research methodology, access the full report: Older People from Ethnic Minorities in Kirklees: Housing Needs and Preferences Study.

Step 5:
Understand the commissioning landscape

Introduction

This step is about understanding how, and in what way, the business case for housing options for older adults fits with the commissioning of adult social care services, and the potential knock-on effects of investing in different housing models on the rest of the market. It involves working with adult social care commissioners to understand the current commissioning landscape, including what is currently commissioned, and future commissioning priorities, particularly with respect to housing for older people. It also involves working with potential investors and developers to understand what information about commissioning they would find helpful and would support them in making investment decisions.

Aside from the importance of commissioning in relation to the business case, those involved in developing a housing plan may not have a good understanding of commissioning, including older adults. It will help with conversations and planning if everyone has some understanding of the local commissioning system and priorities.

This isn't necessarily a sequential step, but something that can happen in conjunction with all steps, to best ensure that the adult social care landscape is a 'data point' that feeds into the provision and development outlined in the business case for housing with care and support. One way to achieve this is to have an adult social care commissioner be part of the housing partnership team developing the business case.

This is important to your business case because adult social care commissioning is one part of the longer-term financial stability of housing with care and support provision. Investors and developers need to be reassured that the business case for housing with care doesn't sit in isolation from the wider commissioning landscape.

How to?

Talk to commissioners of adult social care to understand:

- The strategic objectives of adult social care, the legal requirements under the Care Act, the national and local context, for example, demographic challenges, reduced funding and the pressures on the social care workforce and market.

- How adult social care commissioning works in their local area, for example, which public bodies are involved, the funding sources, the populations served, the services provided, and process of procurement and contracting.

- Trends in demand for, and spend on, different adult social care services and any projections of demand for different types of services.
- The aims and priorities for adult social care, in particular any commitments to developing/expanding different types of housing with care and support and timescales associated with these priorities.
- Sense checking steps 1-4 and discussing how the business case can support work of commissioners.

Talk to potential investors and developers to understand:

- Their current understanding of adult social care commissioning and what further information would be helpful in informing their investment decision-making process.
- Their views on how adult social care commissioning can help support the development of, and investment in, housing with care and support.

SOURCES OF INFORMATION AND RESOURCES
- Kings Fund: Social Care in a nutshell.
- Access group: Commissioning cycle in social care.
- DLUP: Social care resources.
- Kings Fund: What is commissioning and how is it changing?
- The Care Act 2014: Responsibilities of local authorities.
- SCIE: Care act, assessment and eligibility.

PARTNERS TO INVOLVE
- Adult social care commissioners, integrated care board, investors and developers.

TIPS ON CO-PRODUCTION

The 'I' and 'We' statements below are illustrative examples of co-production outcomes associated with this step. We encourage housing partnerships to adapt them as they see fit to best reflect their local context.

For individuals:

- I understand what commissioning is, how local organisations work together to deliver housing, and how it affects my access to services and housing for older people.
- I define the key messages that need to be communicated when describing the commissioning landscape based on how it affects my housing options and access to services.

For the partnership:

- We facilitate individuals' understanding of the objectives and process of commissioning, local organisations and partnerships involved, and how these affect individuals' access to services and the local market for housing for older people.
- We have conversations and take on board individuals' views on the key messages that need to be communicated when describing the local commissioning landscape.

Further information about the benefits of and principles of co-production, as well as examples of co-production in the housing sector can be found here.

CHANGES TO THE ADULT SOCIAL CARE COMMISSIONING LANDSCAPE

"Commissioning arrangements have evolved since their introduction, including through numerous changes to the structure and remit of the organisations that commission care. The underlying philosophy of commissioning has also changed over time with a move away from transactional models and towards greater partnership working. These changes are all part of enabling a shift towards strategic commissioning and a more collaborative approach to planning and improving services. This means that, instead of focusing on procurement and contract management, the role of commissioners is to work closely with key partners across the system (including providers) to understand population needs, determine key priorities and design, plan and resource services to meet those needs." (The King's Fund: What is commissioning and how is it changing?)
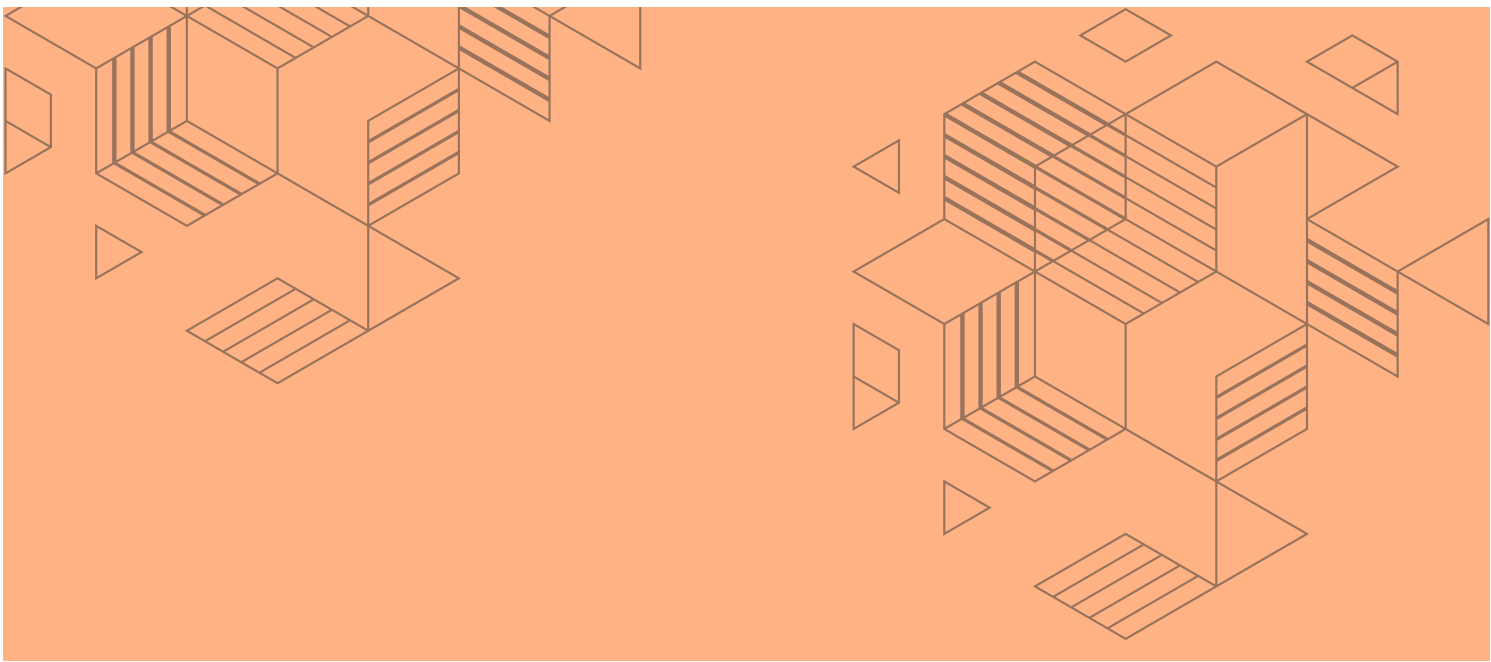
www.scie.org.uk

Updated in April 2024

Toolkit available at: https://www.scie.org.uk/housing/toolkit-for-place-based-plans-for-housing-for-older-adults/

Step 6:
Drawing on best practice

Introduction

This step is about ensuring that your strategy and approach towards developing your business plan draws on best practice such as:

- National and local research, examples and benchmarks relating to best practice in the development of housing options for older people, particularly that which is relevant to your local area.

- Housing business plans developed by other local areas through discussions with developers, operators, commissioners, growth or investment teams, and planners elsewhere.

What will it add?

This step will improve the quality of your business plan by widening the lens beyond your own local authority to identify and learn from what is already working well in other areas and detect any gaps in your own strategy or process that need to be addressed. It will also help develop more detailed and technical specifications, based on best practice, for the capital and/or revenue investment opportunities identified in your business case. This in turn will ensure investors and developer have more clarity about expectations in terms of high-quality design and service delivery that meets the need of older people.

KEY QUESTIONS

You will need to consult published research and data and talk to other commissioners to understand:
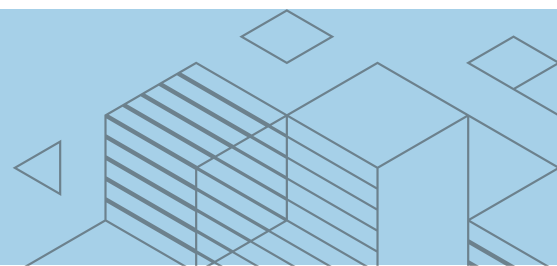
Development standards and guides

- What does the evidence base say about best practice and innovation in the development of different types of age-friendly general housing and housing with care and support for older people?

Inclusive design

- What does the evidence base say about best practice and innovation in the development of new housing with care and support for older people, with a particular focus on equality, diversity and inclusion?

Peer review

- How have other local areas with similar local profiles developed and delivered their business cases? (This could also be a housing strategy, development plan or other housing-related report.)

- Learning from how local areas whose business plans are recognised as representing good practice, developed and delivered their plans?

# How to?

Development standards and guides

- Consult published guidance on best practice in the development of the different types of general and specialist housing options for older people. There are a number of guidelines and standards you should consult, depending on the type and level of investment you would like included in your business plan.

- In developing your specifications for investment opportunities, it is also important you consider developments that have successfully used such guidance. Sources include: Housing LIN design hub tools and case studies and SCIE housing with care and support promising practice examples and case studies.

Inclusive design

- Consult published guidance on best practice and innovation in the development of housing options for specific groups, considering equality, diversity and inclusion:
    - People living with dementia.
    - Autistic people and/or people with learning disabilities.
    - LGBTQ+ groups.
    - People from ethnic minority backgrounds.
    - People with physical, visual or hearing impairments.

- Again, in developing your specifications for investment opportunities, it is also important you consider developments that have successfully used such guidance. Sources include: The Housing LIN curates a selection of dedicated pages with relevant tools, resources and case studies and SCIE housing with care and support promising practice examples and case studies.

Peer review

- Speak with commissioners from other local authorities with similar local profiles, for example, similar socioeconomic and demographic profiles, or similar housing stock challenges, to understand:
    - The housing and supply solutions they have explored.
    - The challenges they have encountered and how these have been addressed.
    - How they have made decisions about the capital and/or revenue investment opportunities included in their business plan.
    - Any innovative examples of new housing development or repurposing existing housing.
    - The relationships they have built with the sector, including funders and developers and how they engaged with communities to co-design/co-produce solutions.
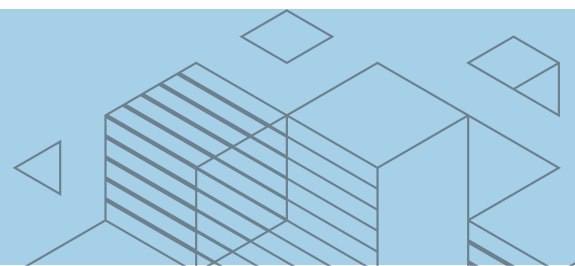
- Speak with commissioners whose business plans have been recognised as representing good practice to understand:
  - How they developed and delivered their plan?
  - What did the process involve? Challenges encountered and how these were addressed?
  - How have they assessed demand and supply? How have they made projections? Conducted cost benefit analyses?
  - How did they consider the information needs of different audiences?
  - How they have tendered/procured care and support?

SOURCES OF INFORMATION AND RESOURCES

Development standards and guides

- SCIE's principles of excellence in housing.
- Lifetime homes standards.
- HAPPI principles (meeting the needs of older adults).
- BREEM new construction standards (best practice in sustainable building design, construction and operation).
- Accessible homes standards.
- Guide to accessible homes by the Centre for Ageing Better.
- Creating age-friendly developments guide.
- Age-friendly communities framework developed by the World Health Organisation.

Inclusive design

- People with dementia - dementia friendly health and social care environments, designing homes for cognitive ageing, housing for people with dementia – are we ready?
- Autistic people and/or people with learning disabilities - building the right home, the Reach standards, the supported housing national statement of expectations and resources for improving housing choice and supply.
- LGBTQ+ groups – Our voices: LGBT+ later life housing demand in London; Housing, Ageing + Care: What Manchester's LGBT communities want from the UK's first purpose-built LGBT extra care scheme; Community Engagement for Design
- People from ethnic minority backgrounds - Housing and the older ethnic minority population in England and Diversity Matters.
- People with visual or hearing impairments - A safe deaf place and sight loss, home and the built environment.

PARTNERS TO INVOLVE

- Local authority staff from social care, housing, planning, public health, regeneration, estates and finance.
- Local representative groups, charities and community groups.
- Commissioners from other local authorities who have developed housing with care and support business plans.
- Integrated Care Boards, Health and Wellbeing Boards and commissioners of health and social care.

TIPS ON CO-PRODUCTION

The 'I' and 'We' statements below are illustrative examples of co-production outcomes associated with this step. We encourage housing partnerships to adapt them as they see fit to best reflect their local context.

For individuals:

- I have the opportunity to learn about best practice in relation to different types of housing options, design and support.
- I say what is important to me in terms of the quality and characteristics of the types of housing options that best suit my needs.
- I decide which examples of housing developments should be considered best practice, based on my needs.

For the partnership:

- We facilitate individuals' understanding of standards, guidelines and best practice with respect to different types of housing options, broadly and with respect to specific groups.
- We take on board individuals' decisions and use the chosen best practice examples to shape the business case.

Further information about the benefits and principles of co-production, as well as examples of co-production in the housing sector can be found here.
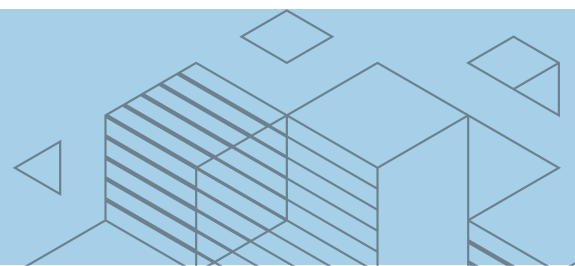
Hertfordshire – Extra Care design standards

Hertfordshire developed a bespoke set of design standards for their Extra Care business plan. These were shaped by National standards, good practice and excellent schemes in other areas, and reviewed by Pozzoni Architects, who have extensive experience of designing extra care and retirement housing, to ensure they are practicable, sensible, and reasonable. The level of detail provided by these standards demonstrates that the council has clarity and commitment to what they expect from developments.

The design standards consist broadly of two sets of criteria:

- Design guidance detailing essential accommodation in homes, communal spaces, and for staff, accommodation hierarchy and spatial arrangements.

- Minimum sizes guidance including to site size guidance and features, location, arrangement and subsequent accommodation requirements.

- Detailed specifications are provided for these sets of criteria accompanied by illustrative sketches. Design expectations include requirements for developments to meet a number of desired outcomes for residents:

  - Be energy, light and sound efficient - to maximise natural light, reduce energy consumption, and retain warmth.

  - Have suitable space standards and ensure that outdoor space is an integral part of any design.

  - Include a range of communal spaces to facilitate different activities.

  - Be designed such that care can be easily and efficiently delivered.

  - Be dementia friendly.

  - Be built to 'Housing our Ageing Population; Panel for Innovation' (HAPPI) standards, with enhanced features to help with mobility, connectivity and independence.

  - Be technology-enabled where possible - to allow for future advances.

  - Be adaptable to allow changes to be made to meet individual needs.

  - Be built with the local community in mind, reflecting cultural diversity and local features.

Access Hertfordshire's full extra care housing business case for more information.

Step 7:
Assess costs and benefits

Introduction

This step will support you to identify and compare cost and benefits for different types of housing for older people considering different care levels across different funding arrangements. This step is intended to give an overview of key cost-benefit information that relates to your local area, and different housing options, rather than a detailed set of costs or 'return on investment' that would be undertaken for a specific build.

What will it add?

It will provide indicative costs and benefits for different types of housing for older people to help potential investors, the local authority and other local stakeholders to better assess the economic benefits and make an informed decision.

KEY QUESTIONS

- What is the ongoing cost of care supported by each housing option being compared?

- What are the land costs, building and refurbishing costs, and running costs per unit for each type of housing?

- What are the key considerations relating to the costs of different housing options for different groups? i.e. self-funders (older people), the local authority, the Government (e.g. DWP), investors and providers?

- What are the potential benefits, for example for social care provision or the NHS?

- What are the potential risks to investors, local and national, and how can these be mitigated?

How to?

- Start by identifying the levels of care supported by each housing option and the ongoing costs of providing low, medium, or high levels of care and support in each setting.

- Consider the people that live in your area and any gaps in provision (identified in steps 1-4) as well as the mix of self-funders, full and partially funded, attendance allowance eligible, etc. This will help to identify costs and benefits of addressing those gaps as well as identifying how some costs would be met.

- Identify costs related to land, building, refurbishments, as well as the running costs for each type of housing.
  - Consider the split cost for individuals, city council, and government.
  - Relate these costs to information on the local market (step 3) including house prices.
- Identify the potential benefits of housing for older people to older people and their families, the NHS and social care systems. You can consult the data sources listed below for national averages if local data is not available.
  - Wider benefits to the local area can be further considered within social value of investment (step 10).

SOURCES OF INFORMATION AND RESOURCES

- SCIE cost and benefits analysis tool - to help local organisations to consider the relative cost and benefit of residential care, extra care, sheltered housing and shared lives
- Health and social care costs for extra care housing
- Economic impact assessment of Retirement Living and Assisted Living Extra Care with a focus on health and social care benefits, social capital gains, and investment benefits
- Identifying health and care system benefits of housing with care
- Health and social care costs for residential care and nursing homes for older people considering private and local authority's provision
- Cost model: extra care housing – although this example is specific on extra care housing, it provides relevant insights on cost and benefit analysis for other types of housing with care and support
- Cost benefit analysis methodology – an example from Northern Ireland with insights on key aspects of the methodology
- Cost comparison between different types of specialist housing in England – Pages 10 to 17
- The health and social care cost benefits of housing for older people
- Living not existing: The economic and social value of wheelchair user homes, (Habinteg, 2023)
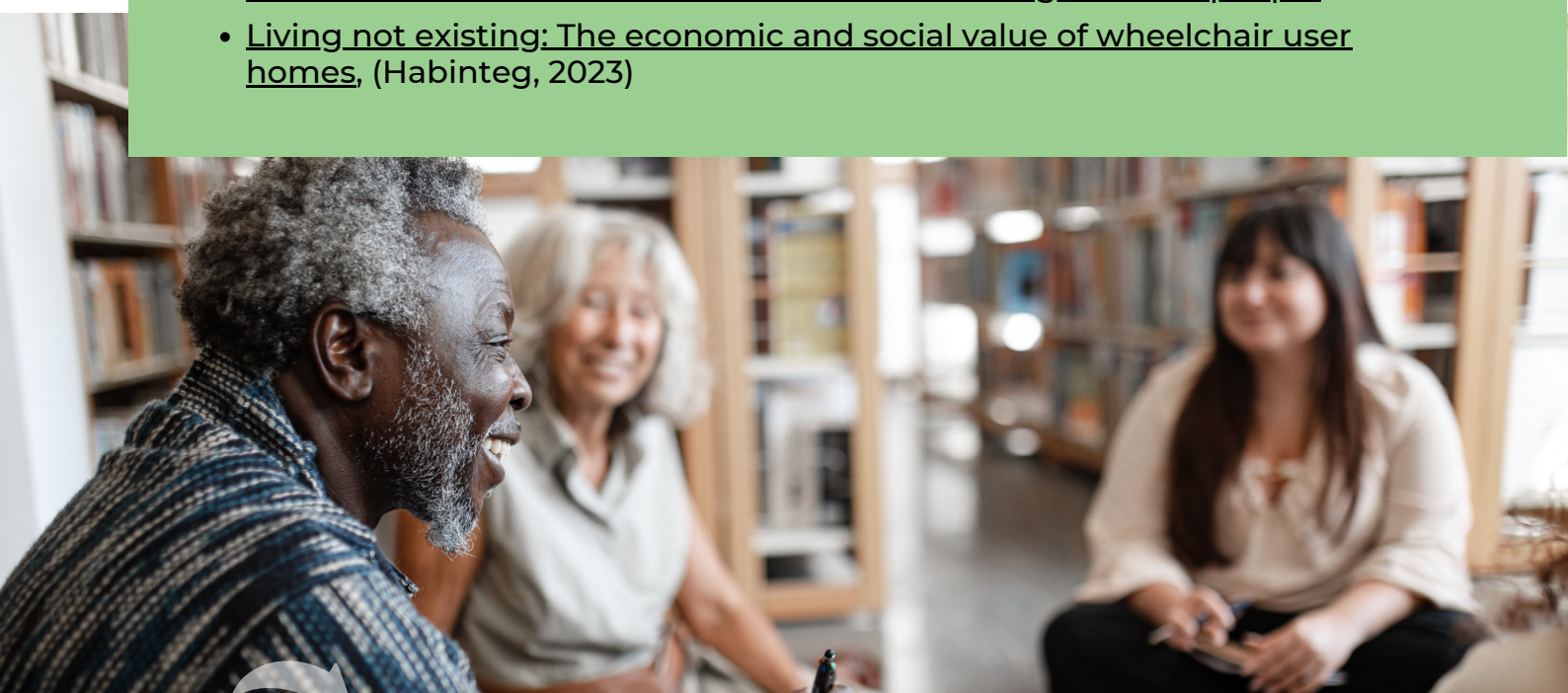
PARTNERS TO INVOLVE

To gain access to this information, it is key that you work in partnership with relevant organisations and agencies. Below are some examples of some key partners to be considered and their areas of expertise.

- Strategic housing and social care policy teams.
- Planning and development teams.
- Specialist housing associations.
- Health and social care senior management (providers and commissioners).
- Director of Finance.
- Corporate resourcing team.

TIPS ON CO-PRODUCTION

The 'I' and 'We' statements below are illustrative examples of co-production outcomes associated with this step. We encourage housing partnerships to adapt them as they see fit to best reflect their local context.

For individuals:

- I understand the key costs of each type of housing, particularly as they relate to my funding status (self-funders, full/part funded, etc.).
- I understand the key benefits of each type of housing and how they can affect my life and the wider health, social care and housing markets.
- I help decide what cost and benefit factors should be prioritised in the business case.

For the partnership:

- We make relevant information on costs and benefits accessible to individuals and facilitate their understanding through practical examples.
- We support individuals to identify the most important cost and benefit factors to be prioritised in the business case.

Further information about the benefits of and principles of co-production, as well as examples of co-production in the housing sector can be found here.

Housing LIN published "The health and social care cost-benefits of housing for older people (2019)" report outlining the evidence for the health and social care benefits, and specifically cost-benefits, of housing for older people, particularly extra care housing. The report presents strong evidence that suggests that housing for older people provides a significant cost-benefit to the NHS and local social care systems.

Several examples are presented in the report demonstrating the importance of assessing cost and benefits of housing for older people to further understand the relevance of investing in extra care. It was identified a variety of cost-benefits, including:

- Less frequent visits to GPs.
- Fewer community nurse visits.
- Fewer ambulance calls, particularly in relation to falls.
- Shorter unplanned hospital stays and less frequent unplanned admissions.
- Extra care is seen as a preventative alternative to residential care leading significant savings in the long term.
- People are less likely to enter long-term care.
- Improved wellbeing and quality of life.
- Estimates suggest that extra care saves the NHS and social care an average of £2,441 per annum per individual.

These are some examples of wider benefits of investing in extra care that can add value to the business case and help developers and investors in the decision making. While the report is focused on extra care options, it offers valuable insights and examples of that can be extrapolated to other types of housing for older people. The report also provides a calculation method for a cost-benefit estimate with references to sources of information that can help to understand cost and benefit of other types of housing.

Access the full report.

Step 8:
Reviewing findings with stakeholders

Introduction

This step is about engaging with wider system stakeholders who are not represented on the housing partnership and who may or may not have been involved during previous steps. The purpose of this engagement is to share what you have found and developed so far in the previous steps and to gather feedback, address concerns and build buy-in. This will help reassure potential investors that your business plan has wider backing of all system partners.

KEY QUESTIONS

- Which partners and/or stakeholders do you need to engage with?
- What is the purpose of this engagement and how will this be achieved?
- What format or style of engagement is most appropriate; is this the same for all stakeholders or is a range of approaches useful?
- Which of the findings from steps 1-8 most resonate with stakeholders?
- Have the stakeholders identified any omissions or barriers you have not foreseen?

How to?

- The wider system stakeholders that you decide to engage with will depend in part of the nature of your business plan. However, they should include representatives from:
    - Older people and carers, representative groups, charities and community groups.
    - Integrated Care Partnerships and Health and Wellbeing Boards.
    - Housing providers and developers.
    - Housing associations.
    - Social care and community services providers.
    - Community outreach teams: reablement, hospital discharge, step-down.
    - Equality and diversity representative groups.
    - Elected members (also known as local councillors).

- The purpose of engaging wider stakeholders should be to share the information gathered, ideas generated and the tentative proposals for your business case that has been produced through steps 1-7. More specifically, you should:
    - Share which aspects of the process and information gathered to date has been the most rewarding, interesting or surprising.
    - Sense-check the material with stakeholders – do the findings resonate? Are there any glaring omissions? Any challenges or barriers you have not foreseen?
    - Address any concerns raised by stakeholders – this will help foster a sense of ownership, buy in and being part of the journey of the development of the business case.
- You will need to consider the format of engagement that is most appropriate and convenient for different stakeholders and develop content for that format. This can include:
    - Communication over email – can be used to communicate to several stakeholders simultaneously, content of emails can be personalised and provides an 'audit trail' of communication.
    - Surveys – online or email surveys can be a good method for involving a large number of people relatively quickly in a decision or set of options, however, it should usually be combined with virtual or face-to-face engagement with room for discussion.
    - Virtual or face-to-face engagement – adds a personal dimension, enables discussion and fosters buy-in.
    - Deliberative events – deliberation is an approach to decision-making that allows participants to consider relevant information from multiple points of view. Deliberative events enable participants to discuss the issues and options and to develop their thinking together before coming to a view, taking into account the values that inform people's opinion. If a housing with care plan has several options, for example, this might involve giving the participants the pros and cons of each option before asking them to choose which one they prefer.
- Collate and analyse or write-up the feedback and information from reviewing the findings with the stakeholders. Where appropriate, use this to add to your business plan or to identify gaps that could be filled.
- Reflect on the activities with stakeholders and if this approach worked well. You could gather more formal feedback data and/or consider if your aims were met.
- Finally, consider how engagement and communication with wider stakeholders will be sustained, feedback will be integrated, and any concerns raised will be addressed.

TIPS ON CO-PRODUCTION

The 'I' and 'We' statements below are illustrative examples of co-production outcomes associated with this step. We encourage housing partnerships to adapt as they see fit to best reflect their local context.

For individuals:

- I help to build a list of stakeholders to be engaged with and the format and delivery of engagement with different stakeholder groups.
- I speak with and deliver presentations to stakeholders to make them aware of my views on housing for older people and how this is addressed by the business case.

For the partnership:

- We support individuals to identify stakeholders and plan the format and delivery of engagement with different stakeholder groups.
- We plan and make sure individuals have the opportunity to talk to stakeholders about their views on housing for older people and how the business case will match their views.

Further information about the benefits of and principles of co-production, as well as examples of co-production in the housing sector can be found here.

PLANNING WITH PEOPLE WHO USE AND DELIVER SERVICES: SHARED LIVES

"In many public service settings, plans and initiatives, often with far-reaching consequences, are developed with little or no involvement from local people and other organisations working in the sector. This is not only morally wrong, in my view, it is likely that by not involving wider groups, you miss out on some of the best insights, ideas and viewpoints about how a service could be better designed and delivered. That is why in developing a new service or way of delivering a public good, you need to engage all groups that are involved either in drawing on or delivering support throughout the process, checking back with them as often as you can on the plans as they emerge."

Ewan King, Chief Executive, Shared Lives Plus
(Shared Lives Plus is the UK membership charity supporting the shared living sector which comprises of Shared Lives and Homeshare.)
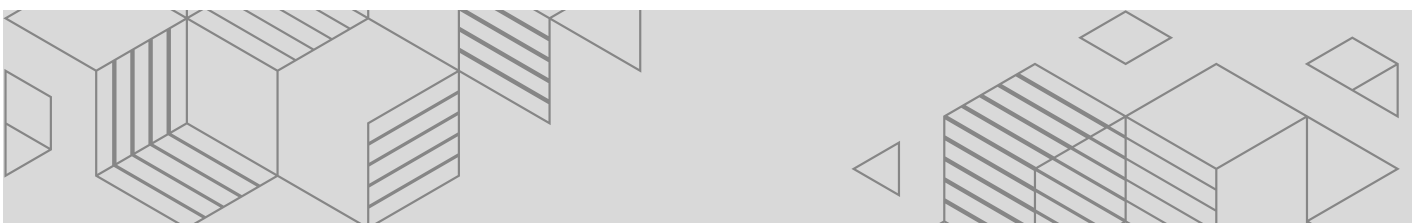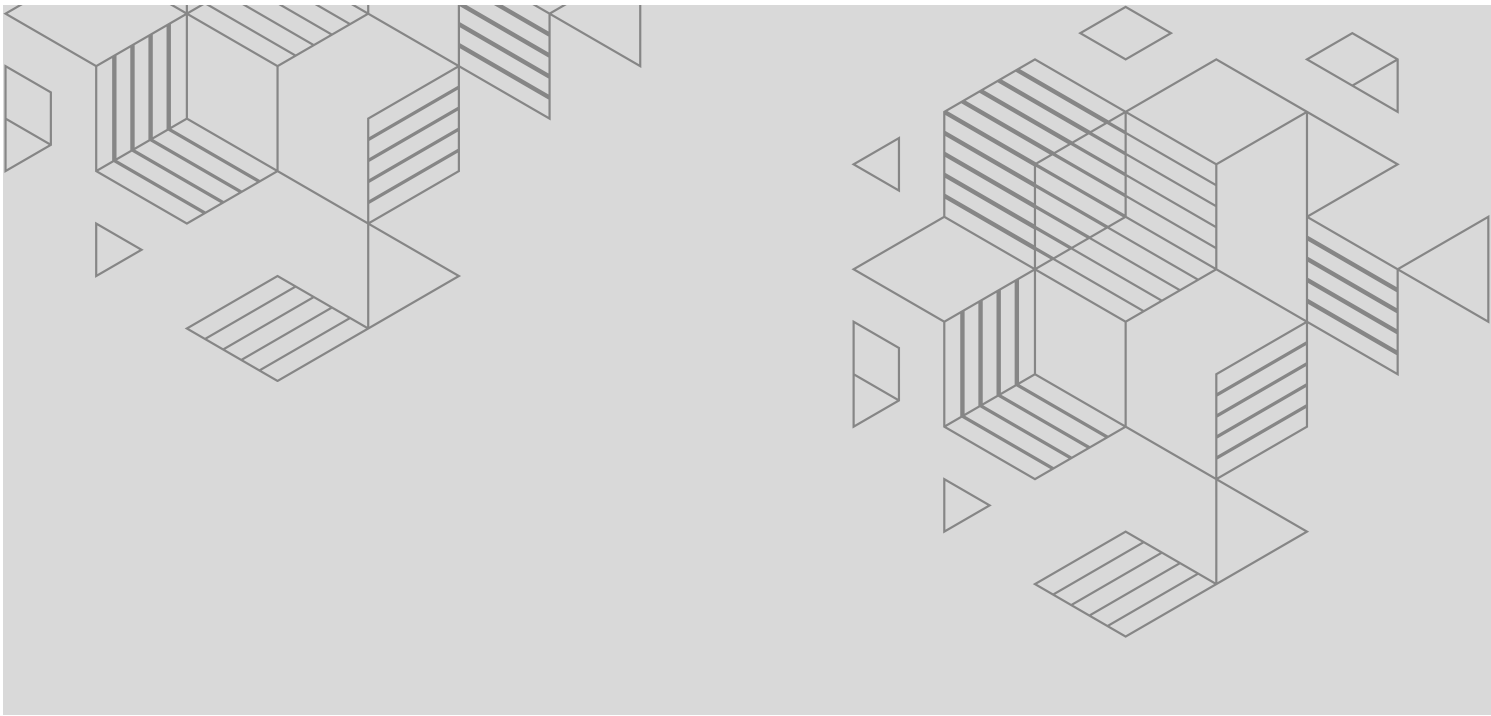
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Toolkit available at: https://www.scie.org.uk/housing/toolkit-for-place-based-plans-for-housing-for-older-adults/

Step 9:
Exploring commercial options

Introduction

This step is about exploring revenue, capital and investment options to fund the development of housing options for older adults, particularly housing with care and support, but also opportunities for housing that enables people to age in place. It is important to think innovatively about all potential sources of funding available including but not limited to national funding streams, private investors/developers and/or housing associations and providers in your local area, local partnerships or consortiums, grants from charitable organisations as well as funding from local authority revenue and local health commissioners/ICBs. Equally important is identifying potential and suitable sites for housing with care and support developments, owned privately or by the council.

What will it add?

This step will improve your business plan by clarifying the investment required by developers or investors and that which could be contributed by the local council or national funds.

KEY QUESTIONS

- What funding is available at the national level and how can this be accessed and deployed?

- Who are the local or regional housebuilders, developers/providers that have historically been active investors in the development of housing with care and support for older people?

- Are there any local or regional partnerships or consortiums that have a particular interest in funding housing with care and support for older people?

- What public sector grants or revenue sources are available at the local level to help fund housing with care and support?

- What capital or revenue funding is available from the local council to help fund the development of housing with care and support?

- What other sources of capital funding, e.g. borrowing, are available at the local level?

- What privately, council or other publicly owned land sites are available for development of housing with care and support?

- What is the process and pathway by which investors or developers can register their interest?

How to?

- Understand the different grants and funding programmes that are available at the national level and what types of housing developments these can be accessed for. For example, the <u>Affordable Homes Programme</u> run by <u>Homes England</u>, the <u>Mayor's Care and Support Specialised Housing Fund</u> run by the Greater London Authority and the <u>Better Care Fund.</u> It will be important to understand any time constraints regarding when such grants can be accessed and need to be disposed of, as well as any restrictions or requirements attached to these funding streams.

- Identify local housing associations, developer and providers that have been active in housing developments historically and with whom the local authority already has good working relationships. It is also important to identify potential new developers/providers that are keen to enter the market and invest in building housing with care and support developments.

- Identify any local partnerships or consortiums, for example consortiums that include local housing associations, real estate investment companies, providers and developers that have an interest in housing with care and support development.

- Identify local or national charitable organisations that provide capital and/or revenue grants for housing development.

- Identify other sources of capital funding such as borrowing and loans, private equity and social finance. Architects and academic institutions working with housing for older adults may also have schemes, funding or projects that could support you.

- Identify your local council's sources of capital and/or revenue that can be used to help fund housing with care and support developments.

- Identify privately, council or publicly owned land sites and assess their suitability for disposal for the development of housing with care and support, and their associated costs.

- Consider any potential opportunities through planning obligations (also known as section 106). This is an agreement between a developer and a local planning authority regarding measures that the developer must take to reduce their impact on the community, for example by providing contributions for local infrastructure.

- Develop a robust pathway for investors and developers to register their interest, access further information if needed, and be kept engaged and up-to-date as plans develop.

SOURCES OF INFORMATION AND RESOURCES

- Department of Health and Social Care.
- Department for Levelling up, Housing and Communities.
- Housing LIN.
- Homes England.
- Affordable Homes Programme.
- GLA Affordable Homes Programme.
- Better Care Fund.
- Homes England Land Hub.
- Using land for homebuilding and regeneration.
- Older Persons Shared Ownership (OPSO) scheme.

PARTNERS TO INVOLVE

- Local authority from adult social care, housing, planning and regeneration, finance and resources and land management.
- NHS, Integrated Care Partnership and Better Care Fund managers.
- Homes England and the Greater London Authority.

The 'I' and 'We' statements below are illustrative examples of co-production outcomes associated with this step. We encourage housing partnerships to adapt them as they see fit to best reflect their local context.

For individuals:

- I am aware of the different ways that housing for older people can be funded in my local area.
- I understand the role that different organisations play at the national and local level, in funding housing for older people.
- I help decide how the funding information gathered should inform the investment options described in the business case.

For the partnership:

- We facilitate individuals' understanding of the objectives and process of commissioning, local organisations and partnerships involved, and how these affect individuals' access to services and the local market for housing for older people.
- We have conversations and take on board individuals' views on the key messages that need to be communicated when describing the local commissioning landscape.

Further information about the benefits of and principles of co-production, as well as examples of co-production in the housing sector can be found here.

CASE STUDY

Appleby Blue Almshouse, Southwark

Opened in 2023, Appleby Blue Almshouse is run by United St Saviour's Charity. The 57-apartment development was designed by Stirling Prize-winning architects, Witherford, Watson and Mann, and has already won awards, being described as "setting a new benchmark for older people's housing, highly improving the quality of their lives by creating a thriving and supportive community".

Built on the site of a 1960s former care home on Southwark Council freehold land, Appleby Blue was funded via a Section 106 agreement (an affordable housing requirement) on a major private sector development called Triptych Bankside, situated elsewhere in Southwark, near to the Tate Modern. This was developed by JTRE London and instead of encompassing affordable housing within that development, Southwark Council set a requirement that Appleby Blue was to be developed on another local site, providing purpose-designed social housing for older adults in Southwark.
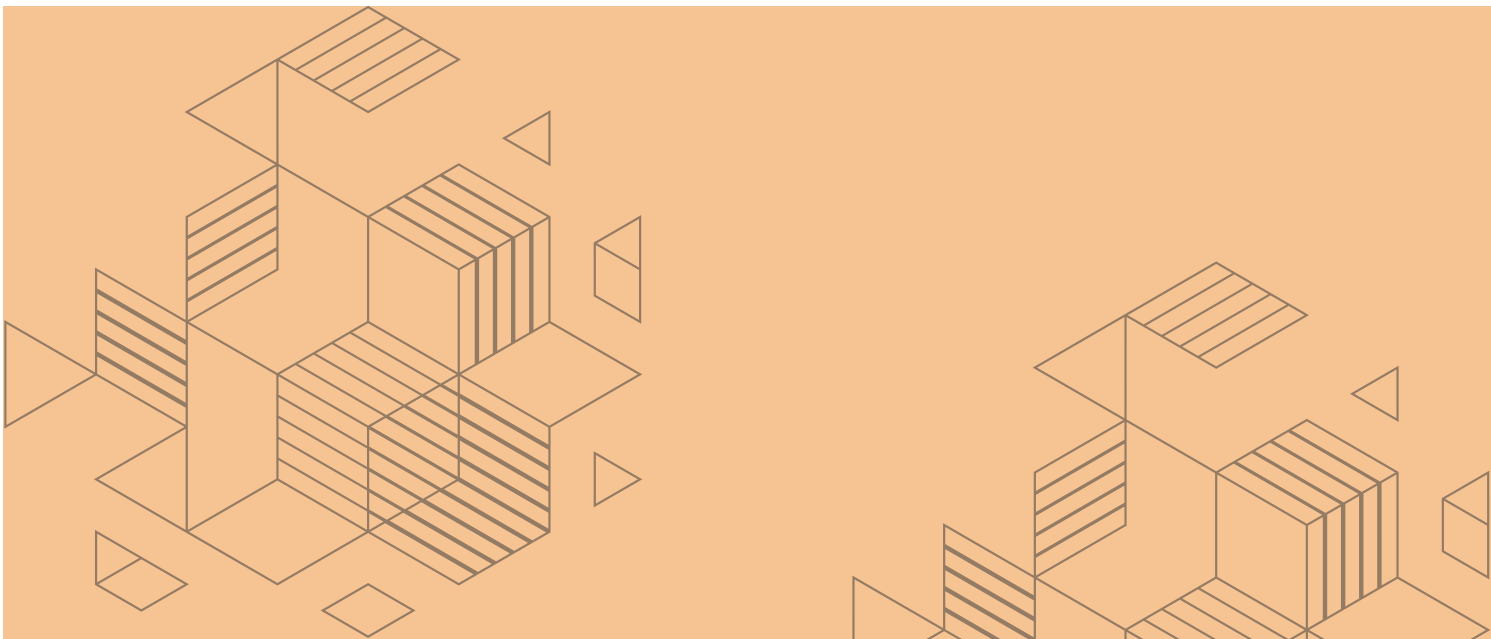
Step 10:
Social value of investment

Introduction

This step will support you to assess the social value and investment implications for housing options for older adults. This step will highlight how developing housing for older people can improve local economic, social and environmental wellbeing. It will also contribute to the requirements placed on local authorities by the Public Services (Social Value) Act (2013) by helping to identify additional community benefits of developing housing for older adults. The Social Value Act requires all public sector organisations and their suppliers to look beyond the financial cost of a contract to consider how the services they commission and procure can improve the economic, social and environmental wellbeing of an area.

What will it add?

- A list of wider economic, social, and environmental benefits linked to the proposed development of housing for older people in your region.

KEY QUESTIONS

- Are there any social value policies or social value statements for your locality?
  - Has social value forecasting been part of your planning?
- How can you link any social value associated with developing housing for older people with the local social value strategy and Social Value Act (2013)? Consider the following:
  - Will the proposed development promote the improvement of skills and employment in the locality?
  - In which ways the development of housing options for older people will support the development of the local economy and local businesses?
  - What are the impacts of the development in the community and how can it promote health, safety, and resilience?
  - In which ways will the development improve and protect the environment?
  - How will the development support the new solutions to local problems and support innovation?
- How will a social value evaluation and reporting be reflected on procurement and partnership with stakeholders?

How to?

- Use the questions above to identify the key areas of social value to focus on.
- Gather any local social value policies and statements for your area and consider how these relate to any social value associated to the proposed development of housing options.
- Identify key social values associated with the proposed development of housing options. This may include:
  - Promoting local skills and employment – increasing local employment rates, fairer working conditions, and more opportunities for training and skills development, and employability, including for disadvantaged groups and young people.
  - Supporting growth – more opportunities for local businesses and voluntary organisations, improving the wellbeing and mental health of local staff, reducing inequalities, social value embedded in the supply chain.
  - Improving health, safety, and resilience of communities – reduction in crime rates, creating healthier communities, supporting more people to live independently, and increased support to the community.
  - Environment – reducing carbon emissions and air pollution, protecting natural resources, promoting circular economy and local solutions, promoting sustainable procurement practices.
  - Innovation – supporting innovation to develop skills and employment, develop communities, and protect the environment.
- The National TOMs framework provides detailed guidance and templates to assess social value based on the above aspects.
- Incorporate the evidence collected through the above step into the business case linking key social values identified with local social value policies and with the Public Services (Social Value) Act (2013).

SOURCES OF INFORMATION AND RESOURCES

- Guidance on how to measure social value by HACT
- Social value toolkit for local authorities
- National Toms – framework developed by the Social Value Portal and LGA to support local authorities to identify social values
- Public Services (Social Value) Act (2013) – requires commissioned public services to think about how they can also secure wider social, economic and environmental benefits
- Homes England: Measuring social value – research reports and guidance to inform the measurement of social value
- National Housing Federation – measuring social value: guidance for housing associations
- Scottish Federation of Housing Associations – social value toolkit guidance notes
- Guide to using Social Value Model – embedding social value on tendering process
- Example of social value statement – Hammersmith & Fulham Council
- Example of social value framework – West Sussex

PARTNERS TO INVOLVE

To fully explore the social value of developing housing options for older people, it is key that you work in partnership with relevant organisations and agencies. Below are some examples of some key partners to be considered and their areas of expertise.

- Local authority (LA) housing and planning departments as well as finance / corporate resources, regeneration and growth or improvement.
- LA procurement and community investment teams.
- Senior Local Authority (LA) leaders focussed on housing, social care, older adults.
- General needs and specialist housing providers (LA, housing associations and commercial operators).
- Health and social care senior management.
- Social care and community services providers.
- Older people's representative groups, charities and community groups.
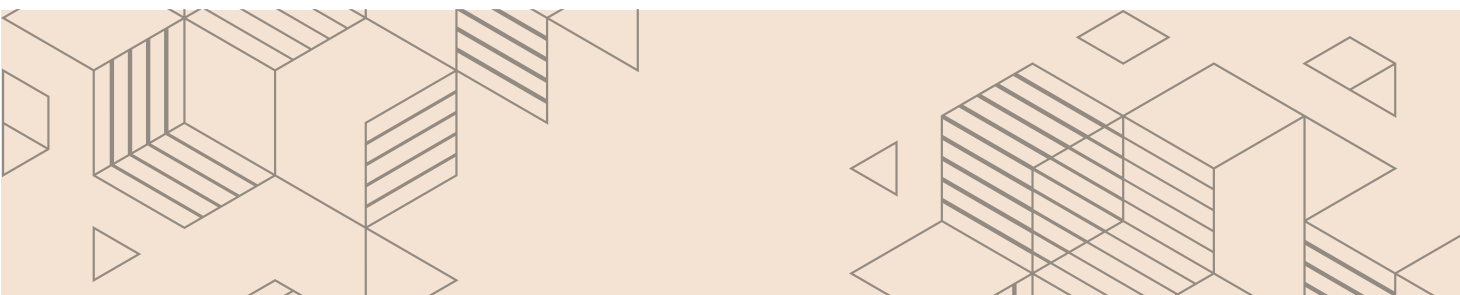
TIPS ON CO-PRODUCTION

The 'I' and 'We' statements below are illustrative examples of co-production outcomes associated with this step. We encourage housing partnerships to adapt them as they see fit to best reflect their local context.

For individuals:

- I understand what social value is and the key benefits of developing housing for older people to the local economy, NHS, and social care system.
- I decide what implications and benefits are most relevant to me and should be included in the business case.

For the partnership:

- We facilitate individuals' understanding of social value and help them understand the links between housing for older people and the wider benefits to the local economy, NHS, and social care system.
- We support people to decide what implications and benefits are most relevant to them and make sure this is featured in the business case.

Further information about the benefits of and principles of co-production, as well as examples of co-production in the housing sector can be found here.

CASE STUDY

Anchor (previously Anchor Hanover) assessed the social value of supported housing for older people. Adapting the framework for assessing the social value of social tenancy developed by Hyde, they estimated that providing adequate housing can generate a social value equivalent of £3,400 per year for an older person who is not working and has no children.

They identify 'decent housing' as key to promoting a better social value including specialised services that are tailored to respond to resident's needs, with three areas of focus: independent living, connectivity and inclusion, and feeling safe and secure. Measures to tackle loneliness such as shared living, communal spaces and group activities, and a focus on relationship building are a good example of social value added. The study estimates that by addressing loneliness, their model can generate savings of £3,000 to NHS services, while also increasing the quality of life of people living in those schemes.

The framework also focuses on identifying the values and benefits to individuals living in their supported housing. A variety of values and benefits are highlighted, particularly in relation to improving financial, physical, and mental wellbeing, and improving sense of purpose. In the real life stories presented, individuals reported:

- Reduced fear of falling and injuring themselves while at home.
- Reduced fear, anxiety and risk of loneliness.
- Increased income, reduced bills, and increased independency.
- Maintaining previous relationships and gaining new friends.
- Taking part in the local community and contributing to community activities.
- Expanding their social network and reducing dependency on family.

Anchor demonstrate the wider implications of investment, demonstrating the extent of the benefits and savings to individuals and to local and national services. For further information on the above example and full methodology utilised, access the report here.
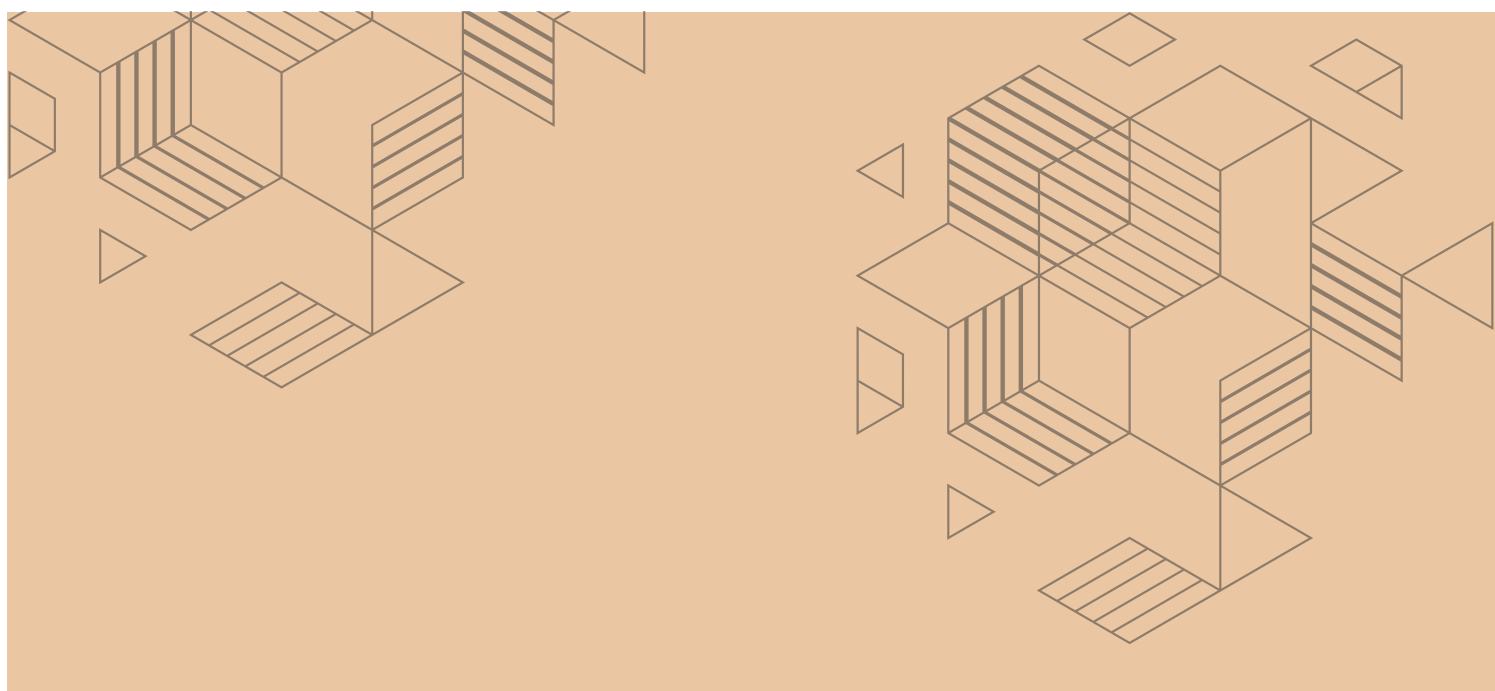
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Toolkit available at: https://www.scie.org.uk/housing/toolkit-for-place-based-plans-for-housing-for-older-adults/

Place-based plans for housing for older adults: business case template

Introduction

This template will help you bring together all information collected in steps 1-10 of <u>the toolkit for place-based plans for housing for older adults</u>, to create your business plan.

To help you to organise and present the content, we have provided an example of a business case structure with suggestions of top-level headings and contents for the different sections of the document. The structure was created based on examples of business cases and local strategies published by local authorities that were considered examples of good practice.

This template is designed to be used flexibly and therefore the structure below should be tailored as needed. Examples of a number of published business cases are given below the template.

Business case structure

Sections	Top level content	Toolkit step
Key advantages for investing in this locally	**Local demography and housing needs** • Local demographic, economic, health, social care and housing trends, local demand. • Needs and preferences for housing in later life. • Profile of people, including economic and health circumstances, and needs and preferences.	<u>Step 1: Understand demand</u> <u>Step 4: Identify needs and preferences</u>

Sections	Top level content	Toolkit step
Key advantages for investing in this locally	**Current and future demand, provision, and opportunities for expansion** • Demand projections for different types of housing. • Current figures and future projections of housing provision for older people, priority areas, and types of housing offered. • Unmet needs and areas of priority.	Step 1: Understand demand Step 2: Map current provision of housing for older adults Step 4: Identifying preferences
	Local market benefits • Description of the local market for housing for older people with an overview of factors driving the local market, affordability, scope for innovation, and opportunities for investment. • Benefits of investing in the locality based on opportunities offered in the local market. • What is currently commissioned, and future commissioning priorities for housing for older people.	Step 3: Understand the local market Step 5: Understand the commissioning landscape
Key advantages for investing in this locally	**Local support** • Local strategy: vision, ambitions and strategy, benefits and support offered by the local council.	Step 2: Map current provision of housing for older adults Step 3: Understand the local market

Sections	Top level content	Toolkit step
Opportunities for Investment	**What is the local priority?** • Types of housing available for investment. • Investment packages – types of housing and priority areas for development.	Step 1: Understand demand Step 2: Map current provision of housing for older adults Step 3: Understand the local market Step 6: Drawing on best practice
	• Key advantages, costs and benefits, and social value of housing options prioritized investment packages. • Commercial options and funding opportunities.	Step 7: Assess costs and benefits Step 9: Explore commercial options Step 10: Social value of investment
Local geography – further information on specific localities	• Map of the region with further detail on neighbourhoods with priority for investment. • Character - mainly urban or rural, population density, demography and future projections. • Demand, provision, gaps, and priorities - a summary of opportunities for investment in the locality. • Plans for development and regeneration, vision for future development, local infrastructure, and other local benefits.	Step 1: Understand demand Step 2: Map current provision of housing for older adults Step 3: Understand the local market

Sections	Top level content	Toolkit step
Relevant documents and policies	**Links to relevant documents and policies** - Masterplans, regional network plan, strategic delivery plan, management plan, local plan, housing needs assessments, local planning policies. - Joint strategic needs assessments, joint health and wellbeing strategies, local adult social care strategy, local housing strategies for older people.	All steps
Information on specific housing design	- Information on specific design requirements for each type of housing.	Step 6: Drawing on best practice

- **Central Bedfordshire** – Meeting the Accommodation Needs of Older People (MANOP)

- **Hertfordshire** - Developing Extra Care Housing in Hertfordshire

- **Greater Manchester** - Framework for Creating Age-Friendly Homes in Greater Manchester, 2021-2024

- **Kirklees** - Housing Strategy 2018 – 2023

- **Outwoods in Burton-on-Trent** - The Business Case for Extra Care Housing

Updated in April 2024

Toolkit available at: https://www.scie.org.uk/housing/toolkit-for-place-based-plans-for-housing-for-older-adults/