



Extra care housing in Wales: A state of the nation report



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1. Introduction

There are a number of factors coming in to play at the current time which make a focus on the role extra care housing (ECH) within Wales particularly relevant:

- The Strategy for Older People in Wales (2013-2023) includes amongst the outcomes it is seeking: *“Older people have access to housing and services that supports their needs and promote independence.”*¹
- The Social Services and Wellbeing (Wales) Act 2014 requires consideration of an individual’s wellbeing and a focus on prevention and early intervention. The appropriateness of housing and housing related support is seen as an important contributory factor to wellbeing, particularly but not only for older people.
- The Older People’s Commissioner² in a review of care homes has acknowledged the need for other forms of care and support including housing with care: *“the potential for further development of other models that combine housing and care, such as extra care, has not been fully explored.”*
- The Welsh Housing Supply Task Force³ has acknowledged that there is significant under-delivery of new homes more generally against projected need. Similarly, the recent Public Policy Institute for Wales report described the need for *“an above trend increase in housing supply”*.⁴
- The National Partnership Forum’s workstream report Housing Issues for Older People and the Housing Role in Health and Social Care recognised extra care housing as *“an important element of an overall strategy to increase choice and options for older people and the need to develop more options and choice in all tenures.”*⁵
- The Public Policy Institute for Wales report exploring the housing needs of an ageing population in Wales includes within its recommendations that the Welsh Government develop a housing strategy addressing older people’s housing requirements, review planning policy and require local housing needs assessments, and develop national and local-level knowledge, information and advice training and education activities to promote awareness of housing options for older people.⁶
- A recent roundtable discussion concluded that extra care housing also has to be more visible so that more people can exercise a choice about their housing needs and wishes in their later life, with the potential for Government to make it clear that it believes extra care housing is a preferred environmental planning option now and for the future.⁷



Golau Caredig, Barry (Hafod Care Association)

¹ <http://gov.wales/docs/dhss/publications/130521olderpeoplestrategyen.pdf>

² Older People’s Commissioner for Wales (2014) *A Place to Call Home? A Review into the Quality of Life and Care of Older People living in care homes in Wales*

³ Welsh Government (2014): *Delivering More Homes for Wales: Report of the Welsh Housing Supply Task Force*

⁴ The Public Policy Institute for Wales (2015) *Future Need and Demand for Housing in Wales*

⁵ National Partnership Forum (2015). *Housing Issues for Older People and the Housing Role in Health and Social Care*

⁶ Public Policy Institute for Wales (2015) *Meeting the Housing Needs of an Ageing Population in Wales*

⁷ www.housinglin.org.uk/library/Resources/Housing/Blogs/HLIN_Wales_ECH_Blog.pdf

The establishment of [Housing LIN Cymru](#) last year, with support from the Welsh Government and a select number of sponsors, sought to raise the profile of extra care housing in Wales, and promote the provision of a choice of options reflecting good practice and designed to meet the diversity of needs and preferences across the older population of Wales.

As part of its ongoing activities, the Housing LIN Cymru has worked with the [Institute of Public Care](#) at Oxford Brookes University to develop this up-to-date picture of current supply of extra care housing in Wales, the challenges facing the market, and issues needing consideration for the future. This has been developed through a combination of published information and the views and experiences of a number of experts working in the field.

2. What do we know about the current position?

The following population projections have been taken from Daffodil Cymru⁸; data about supply is as provided by EAC⁹ and as available on Stats Wales¹⁰; it has been supplemented by further information gained from sector experts.



Plas Telford extra care, Wrexham (Clwyd Alyn Housing Association)

2.1 Who are our older population?

An increasing older population: by 2030, the population in Wales aged 65 and over is projected to have grown by 28% overall to around 850,000, with an increase among the oldest age groups at a far higher rate. These older populations are the groups most likely to require additional support. This demographic trend is exacerbated in some parts of Wales where significant numbers of people move from England when they retire.

Significant numbers of older people living alone: nearly half of people in Wales aged 65 and over are understood to live alone, a known risk factor for needing care and support, including because of its impact on mental health and wellbeing.

Increasing numbers of people living with limiting long term illness: the number of over 65's projected to be living with limiting long term illness will increase from about 220,000 in 2015 to about 295,000 in 2030. This group are also more likely to need care and support to maintain both physical and mental wellbeing.

Increasing number of people living with dementia: the number of over 65 year-olds projected to be living with dementia will increase from about 43,000 in 2015 to around 64,000 in 2030. Whilst for some this will mean they require institutional forms of care, many will be able to maintain independent living in appropriate, well designed housing with care and support.

Significant numbers of older people provide unpaid care: it is estimated that by 2020 almost 45,000 people aged 65 and over will be informal carers, including approximately 4,000 aged over 85.

⁸ www.daffodilcymru.org.uk/

⁹ www.housingcare.org/index.aspx

¹⁰ <https://statswales.wales.gov.uk>

2.2 What are their current housing and housing related support options?

A significant proportion of older people live in owner occupied housing: in 2008, 76% people aged 65 or over lived in owner occupied housing, with 13% in local authority housing, 6% in housing association housing, and 5% in the private rented sector.

A significant supply of social rented sheltered housing: as at March 2015, there were 26,863 units of sheltered housing across Wales owned and managed by councils and housing associations, a decrease of 0.85% from 2014¹¹ (see Appendix 1). It is not known to what degree these schemes are fit for the future, but it is thought likely that many will not be offering attractive and appropriate housing for older people.

A limited supply of social rented extra care housing:¹² since 2002, 37 extra care schemes for rent have been completed (1,735 units) using £161m Social Housing Grant. There are a further 5 schemes in the pipeline (230 units) supported by £21m Social Housing Grant and a mix of other statutory funding sources. The majority of schemes are less than 10 years old and of a high standard; there are two schemes formed from converting sheltered housing.

However, latest figures published by the Welsh Government indicated that there are now 2,005 units of extra care housing in Wales, the majority (1,965 or 98.5%) owned and managed by housing associations, and an increase of 11% from 2014¹³ (see Appendix 1).

Estimates suggest there may be up to 52 schemes in total across Wales although a lack of clarity around definitions means it is difficult to be precise at the current time.

A mixed provider market: the majority of ECH schemes are provided by 26 RSL's, with the remainder local authority managed schemes. The largest providers have 6 or 7 schemes each, but most have a smaller number.

A recent Wales Audit Office report noted that access to, and the availability of, housing and housing based support services for older people has reduced in recent years. In addition, it found that only three councils directly provide extra care housing and 11 councils directly manage sheltered and elderly designated accommodation.¹⁴

Very little extra care housing aimed at owner occupiers: there are 2 private schemes providing 109 units of leasehold accommodation (for sale), and there is some interest in developing mixed tenure schemes. There are no retirement villages.

Demand for extra care housing in Wales: the Housing LIN Cymru predictive modelling tool for local authorities and providers that provides a projection of potential demand for specialist housing in Wales, identifies the need for up to 10,500 units of extra care housing by 2030, or approximately 530 per annum over the next 15 years.¹⁵

A focus for the annual £136m Supporting People programme: almost 80% of people receiving housing related support are older people.¹⁶

¹¹ <http://gov.wales/docs/statistics/2015/150806-social-housing-stock-and-rents-31-march-2015-en.pdf>

¹² Given the various definitions of "extra care housing" it is not currently possible to be definitive about the number of schemes across Wales.

¹³ <http://gov.wales/docs/statistics/2015/150806-social-housing-stock-and-rents-31-march-2015-en.pdf>

¹⁴ Wales Audit Office (2015) *Supporting the Independence of Older People: Are Councils Doing Enough?*

¹⁵ www.housinglin.org.uk/SHOPAT

¹⁶ As described on the Welsh Government website as at 29.7.15
<http://gov.wales/topics/housing-and-regeneration/services-and-support/supporting-people/?lang=en>

A significant number of older people are supported in care homes: as at 31st March 2015, there were 11,324 people in Wales aged over 65 supported in care homes by local authorities. Net expenditure by local authorities across Wales in 2014/2015 on residential care was £171,633 and on nursing care £63,704.¹⁷

A significant number of older people are receiving home care: as at 31st March 2015, there were 18,416 people in Wales aged over 65 supported by local authorities with home care. In 2014/15 net expenditure by local authorities on home care for older people was £172,996.¹⁸

2.3 What do our older people say they want?¹⁹

The Strategy for Older People in Wales (2013-2023) notes that:

“Like everyone else, older people expect to be able to participate as fully in society as they desire – including contributing to community and family life, influencing decisions and having their needs recognised and addressed. The varied contributions older people make both economically and socially, are valuable and can only be maximised if barriers to participation are eliminated.”

The Wanless Review²⁰ found that whilst there is a clear preference to remain in their family home, 35% older people would move to a smaller home of their own, and 27% to specialist older people’s housing. Similarly, research for the more recent Demos report found:²¹

“One quarter (25 per cent) of the over 60s in our survey (increasing to 41 per cent of the 76–81 age group and 34 per cent of the over 81s) said they were interested in buying a purpose-built retirement property, and 25 per cent also said they would be interested in renting one on an assured tenancy”

3. What do we mean by Extra Care Housing?



Llys Glyncoed extra care, Ebbw Vale (Linc Cymru)

It is not always easy to describe what extra care housing is, and what it can offer the individual older person, their family, local communities, and local authority and health board commissioners. There is wide variation between different schemes, different providers and different commissioning approaches. There are also different names used to describe this service including extra care housing, very sheltered housing, and assisted living (often used by the private sector); arguably none of

these describe the services offered in a way that would be meaningful to an older person or their family, and there is an argument for creating an approach to providing and describing housing for older people which reflects what is important to local people and local communities.

¹⁷ Stats Wales: *Social Services: Adults Receiving Services by local authority and measure and Stats Wales: Social Services Revenue Expenditure Subjective Analysis by authority.*

¹⁸ *ibid*

¹⁹ See further discussion in Housing LIN/ADASS (2013) *Strategic Housing for Older People Resource Pack Section A: Older People and Housing.*

²⁰ Wanless D (2006) *Securing Good Care for Older People: Taking a long-term view.* Kings Fund

²¹ Demos (2013) *The Top of the Ladder: a new generation of retirement housing could set off a property chain reaction*

However, it is commonly agreed that extra care housing is essentially housing designed, built or adapted to facilitate the care and support needs of residents now and in future, with access to care and support 24 hours a day.²² Importantly it is based on the following principles:

- To promote independence, through the provision of self-contained accommodation designed to enable individuals to live independently, within the community
- To promote well-being and quality of life;
- To be empowering and enabling through the availability of flexible, person-centred care and support services to maximise independence and promote health and wellbeing;
- To promote social inclusion and alleviate isolation.

In 2006, the Welsh Government's guidelines for extra care housing²³ included the following defining elements:

- Living at home, not in a home.
- Having one's own front door.
- The provision of culturally sensitive services delivered within a familiar locality.
- Flexible care delivery based on individual need – that can increase or decrease according to circumstances.
- The opportunity to maintain or improve independent living skills.
- The provision of accessible buildings with smart technology that makes independent living possible for people with physical or cognitive disabilities including dementia. Accessible buildings means accessible to lifetime standards to accommodate changing needs where an individual may require a hoist or wheelchair without requiring major adaptations or change of address.
- Building a real community including mixed tenures and mixed abilities.
- The inclusion of facilities and services, which are also used to support people living in the local community.

Given its flexibility, extra care housing can suit a wide range of people with different levels of need, including:

- People with no current care needs who anticipate that they may have needs in future.
- People attracted to the communal lifestyle offered by this style of housing.
- People with low care needs.
- People whose current accommodation may be unsuitable for mobility or other reasons.
- People with high care needs where extra care housing may be a preferable alternative to residential care.
- Couples with differing care needs.

The flexibility also enables individual schemes to be designed and delivered with and for local communities rather than being a "one size fits all" service.

²² Housing LIN/ADASS (2013) *Strategic Housing for Older People Resource Pack Section B: Developing Extra Care Housing - a detailed review of the planning, design and development of extra care housing*

²³ <http://gov.wales/desh/publications/housing/extracare/guide?lang=en>

4. What outcomes can Extra Care Housing deliver?

There is emerging evidence from across the UK that suggests extra care housing can make a considerable difference to the health and wellbeing of its residents, as well as offering efficiencies in care provision, and making a positive contribution to local communities in a number of ways. The body of evidence in Wales is growing, and the planned evaluation by the Welsh Government this year of schemes it has contributed social housing grant towards will provide further information about what is being achieved nationally.



Llys Jasmine, in the heart of Mold, Flintshire, is one of the first Welsh sites to feature dedicated apartments for people with dementia within the extra care housing facility (Wales & West Housing Association)

4.1 Extra Care Housing can offer a home for life

From feedback received from tenants and key partners and with ongoing assistance from the RNIB and Alzheimer's Society, Linc has improved the design of its schemes such as defining colour contrast, signage, minimising reflective surfaces and confusing shadows. It has also changed other features in its schemes based on tenants' feedback.

*Healthy Homes, Healthy Lives (2014)
Community Housing Cymru et al*

The design of buildings and services in ECH schemes is intended to create a home which enables people to age in place. There can be some constraints around the level of services that can be provided into schemes to support individuals, as well as around the potential to support those with the most complex needs to live successfully in a community; however, there are examples where ECH successfully enables and promotes independent living for those who might otherwise need to move into institutional care.

For example, it is recognised that ECH is generally successful at supporting people living with dementia if they have developed the illness after moving in, or if they move in at the early stages. A variety of approaches can be taken to improve the appropriateness of buildings, and in some cases specialist services can be provided.

4.2 Living in Extra Care Housing can improve health and wellbeing

Research has shown that the design of buildings and services within extra care housing can contribute to a fall in demand for health services, as well as improving physical and mental wellbeing.

The use of a Health Impact Assessment (HIA) has demonstrated the potential benefits of schemes on specific local communities:

An independent survey carried out by Conwy County Borough Council in 2012 into the quality of life at Hafan Gwydir, an Extra Care Scheme in Llanrwst, specifically looked at issues including 'control over daily living; wellbeing; social participation, food and nutrition and general health', and concluded that the scheme 'nurtures the residents' independence and embraces a new concept in adult care'.

*Healthy Homes, Healthy Lives (2014)
Community Housing Cymru et al*

“Overall, it was concluded that the Tan Y Fron Extra Care development has the potential to be highly beneficial for the Tudno area, its local people and support some of the most vulnerable in society”.²⁴

4.3 Extra Care Housing can provide added value to the local community

The development and the delivery of extra care housing can benefit local communities both economically and in providing an ongoing resource for older people:

- They may provide local employment and volunteering opportunities.
- Local businesses may have opportunities to relocate and/or otherwise provide services into schemes.
- People living locally may be able to access services provided within schemes (for example community health services).
- People living locally may be able to participate in social activities within schemes, and so help combat the effects of loneliness and isolation.
- People living in the schemes will access local businesses and services.

Hazel Court in Swansea has become an integral resource for the wider community, forging relationships with stakeholder groups across the local community. The scheme has employed an experienced Community Activities Coordinator to help generate substantial inreach and outreach activities and maintaining the vibrancy of the scheme as a resource for the local community.

Housing LIN Case Study 95, Ensuring Extra Care is Part of the Community, not a Community Apart

4.4 Extra Care Housing can contribute to the local housing market



Cae Garnedd, Bangor (North Wales Housing Association)

Providing an additional, attractive housing option within a local community can help free up family housing which may be under-occupied whether this is social housing or owner occupied housing. This is particularly important where currently there are only limited and/or unappealing options such as old-fashioned or inappropriate sheltered housing and so little to attract an older person to move from their family home.

“Within Wales, total housing wealth is estimated at £171billion. However, housing wealth does not mean better living conditions, with many older people being equity rich but cash poor and living in conditions unsuited to their situation. It is becoming increasingly important to provide housing choices that allow older people to downsize and access their housing equity, which in turn increases the availability of larger homes for younger families, with at least a quarter of this likely to be held by the over 65s.”

McCarthy & Stone (2014) Improving the delivery of older person’s housing in Wales

²⁴ Tan Y Fron Extra Care Housing Development for Older People (HIA) Llandudno, Conwy. Available at www.housinglin.org.uk/_library/Resources/Housing/Regions/Wales/Tan_Y_fron_HIA_-_Final_Report_.pdf

5. The challenges and opportunities going forward

Whilst there have been a significant number of extra care housing schemes developed in recent years, with a small number in the pipeline, it remains a service area which is relatively untapped in terms of its potential as a housing, care and support option for older people in Wales. This is particularly the case for owner occupiers, some of whom may be looking to make a lifestyle choice by “downsizing”, but also applies to those who would seek some form of social housing option because of an increasing health or social care need. There are also ways in which current services could be improved to ensure it most effectively delivers health and wellbeing outcomes for its residents and its local communities now and in the future. This section reflects the views of the experts within the sector, as well as published research relevant to the future development of ECH in Wales.



Llys Enfys at Llanishen, Cardiff (Linc Cymru)

5.1 The role of Extra Care Housing

Whilst there has been recognition of the potential that extra care housing could offer in Wales (and hence the availability of social housing grant in recent years), there has not necessarily been a clear strategic view of how ECH fits within the range of services for older people and the role it should therefore play, whether this is nationally, regionally or locally. This includes its role as a housing offer within local communities, as well as a way of contributing to local health and social care drivers.

There are a number of questions which could usefully be explored further to enhance the added value of existing and future schemes:

- Where does ECH sit in relation to other housing for older people, particularly sheltered housing? Is it clear what the quality of local supply is, whether it can or should be providing a home for life, and whether there are gaps in the market?
- Is ECH seen as a replacement for residential care, and so should be the default offer instead of a care home placement? Has thought been given to the impact on the community within a scheme if a mix is not maintained of people with lower level as well as more complex needs? How could this impact on its attractiveness as a housing offer?
- To what degree have commissioners and providers agreed and promoted it as an enabling service, rather than one that risks creating dependency? Has this been reflected in the design both of the building and the services provided?
- How has ECH as a service been promoted locally amongst local communities (including older people and their families) and local professionals (especially health and social care)?
- How well do we know what current and future older people will want in terms of their housing options?
- Are there aspirational housing design criteria that would make ECH an attractive offer for older people to rent or buy? For example, is there a need for a set of Welsh specialist housing quality indicators such as HAPPI²⁵ in England?

²⁵ APPG on Housing and Care for Older People Inquiry (2012) Housing our Ageing Population (HAPPI2) Plan for Implementation. Available at: www.housinglin.org.uk/Topics/browse/Design_building/HAPPI/

5.2 Enhancing the Extra Care Housing offer

Many of the current schemes are relatively new and are built to a high standard, but there could be further opportunities to enhance the services offered. These are relevant both to providers and local authority commissioners.

Making the case

- Whilst there are national outcomes frameworks for health and social care, it may be helpful to develop a consistent approach to collecting information about the ‘ageing well’ outcomes delivered within extra care housing which builds on existing frameworks and enables evidence to be gathered about the effectiveness of the service across Wales.
- There are existing impact assessment frameworks that can be used to develop a case for developing extra care housing locally, particularly as part of the development process and with an approach that engages with the local community.²⁶

Building awareness and relationships

- As a relatively new service in Wales, and in many cases with only a small presence within individual local authorities, there can be low levels of awareness amongst local communities and professionals:
 - Awareness of the service model amongst planners and regulators can impact on the development of schemes, creating additional complications and potentially preventing the model being taken forward. Clear guidance at a national and local level would be helpful.
 - There is a risk that low levels of awareness will affect demand for schemes, and work is needed to promote the concept and its potential benefits more widely.
 - Information about housing options needs to be part of local Information, Advice and Assistance services.²⁷
 - Housing options need to be considered as part of a social care assessment so as to help avoid housing choices being made in crisis situations.
 - The badging of schemes needs to be meaningful to individual local communities: this may mean not adopting the “extra care housing” label.
- Extra care housing sits across housing and social care (and sometimes health) as a service and this has the potential to create barriers to effective working particularly where it does not easily sit within existing systems. For example, there may be allocation processes which apply to housing, but work less well with specialist housing where social care and health needs need to be considered.
- The complexity of the service also creates challenges for both providers and commissioners in the way they work together and develop shared approaches particularly around risk sharing: for example a social care commissioner may not have an established working relationship with a housing provider (or vice versa); health professionals may have little experience of working with the housing sector.

²⁶ For further information see Welsh Health Impact Assessment Support Unit website at: www.wales.nhs.uk/sites3/home.cfm?OrgID=522

²⁷ Public Policy Institute for Wales (2015) *Meeting the Housing Needs of an Ageing Population in Wales*

Developing the model

- Schemes are currently located in towns and cities rather than in more rural areas. There is the potential to draw on learning from elsewhere in the UK to develop solutions which address the housing, care and support needs of older people in these rural areas which may include some form of extra care housing.²⁸
- Currently there is very limited choice of tenure within extra care housing, and only a small number of private (assisted living) schemes. Given the number of older owner occupiers in Wales there is a significant gap in the market for the various forms of leasehold provision, including shared ownership, as well as private renting in addition to social renting.
- Given demographic trends, work needs to be carried out to ensure schemes are able to meet the needs of residents with more complex needs; for example, there may be the potential to improve how well some buildings enable people living with dementia to live independently.
- There needs to be further work done to understand the most effective and efficient scheme design which ensures all communal space is useable and is used, whilst also ensuring the scheme itself is affordable both for the provider and its residents. There may be examples of aspects of some schemes not being fully utilised at the moment.
- The use of telehealth and telecare is under-developed, and this is a particular opportunity as a way of enhancing or developing services in more rural areas.
- There are limited examples of extra care housing services working in partnership with health, and there is the potential to offer, for example:
 - Step-up or step-down services which prevent hospital admission or facilitate hospital discharge.
 - Facilities in which to base community health services in local communities.
 - A base for public health initiatives working with local organisations and local communities.
- Extra care housing typically includes a number of services which can be provided by local businesses, including by social enterprises. Providers need to be proactive about identifying these opportunities particularly during the design stage of a new service, but also on an ongoing basis to reflect the needs and interests of their residents and their local communities.

5.3 Enabling new services

There is interest in developing new extra care housing schemes which offer a range of tenure options, and target different communities. However, the changing environment presents challenges as well as opportunities:

- New housing, care and support services needs to be designed and developed working with local communities: the co-production of local solutions. This could include forms of co-housing and mutual ownership; it may include extending the model to other vulnerable groups (for example, learning disability or mental health).

²⁸ For example see Housing LIN Factsheet No 12: *An Introduction to ageing in a rural areas and extra care housing*

- The availability of capital funding (social housing grant) has changed, and providers need to review funding models including the use of mixed tenure to ensure the viability of new schemes.
- There is apparent interest from private finance institutions in extra care housing as a model, potentially looking at private rental rather than just sale. There is an opportunity here for new working relationships across the public and private sectors to deliver a wider range of housing options.
- Whilst care within extra care housing is largely commissioned as a block contract, the increasing use of direct payments may mean different approaches are needed to the commissioning and provision of services. There is some experience of using extra care housing as a 'hub' for services into the local community and this approach may need to be developed further to ensure the viability of scheme based services.
- The housing needs of older people, and specifically extra care housing as an option, needs to be included within local planning policy; currently there is little evidence of this.
- There is publicly owned land (both local authority and NHS) which could be made available for extra care housing development as a way of helping to address local health and social care pressures; for example, there may be opportunities around the decommissioning of LA owned care homes which are no longer fit for purpose.
- Given pressures on local housing markets the availability of attractive housing options for older people is particularly important. However, there are other barriers to moving, including the financial cost; there may be scope to develop a "Help to Move" grant to enable downsizing, and so free up larger homes.

5.4 Investing in extra care housing

As described above, there is significant benefit to be gained from considering the housing options available to older people across Wales, and in particular the opportunities presented by the various forms of extra care housing. The scale of provision is currently limited, and as described above (section 2.2) one projection suggests up to 8,000 units of ECH need to be provided by 2030. However, it is unlikely that previous models of funding extra care housing are going to be repeatable in the current economic climate, or into the foreseeable future; new and innovative approaches will be needed at both a national and local level.

In the past:

Time limited dedicated Welsh Government ECH funding of £50m which provided initial stimulation of the sector (2006-2009). There has not been the equivalent of the Department of Health's Care and Support Specialised Housing Fund in England.

Currently:

Whilst there is the potential for Welsh Government funding from Social Housing Grant this is in competition with general needs housing. So for £62m allocation in 2015/2016 an extra care housing scheme attracting £8m could be seen as expensive, and one scheme take up over 10% of a small 'pot' for all social housing in Wales.

There has been some inward investment (for example 2 private schemes by McCarthy & Stone) and other borrowing arrangements backed by the Welsh Government (such as £130m Phase One Housing Finance Grant (HFG) arrangements – one ECH scheme funded).

Other public private partnerships (for example, combining grants with the borrowing capacity of housing associations) could favour larger providers with the capacity to access private equity, pension funds or raise finance by issuing bonds.

In the future?

It is clear that there will need to be a mixed economy that will require different relationships, and a greater clarity about the benefits to be gained from financial or other investment for the different stakeholders. This mixed economy is likely to need to include combinations of the following:

- Borrowing from institutional lenders.
- Dedicated fund such as Housing Finance Grant.
- Government grants targeted at areas where investment is difficult (such as in rural areas) or linked with wider regeneration project finance in urban areas.
- Contributions (financial and/or land) from the wider public sector, particularly health and social care.
- The development of self-funded models, notably mixed tenure,
- Scope for mutual and cooperative models, such as co-housing, and
- Partnerships with health and adult social care (for example, making best use of surplus land or supporting residential care diversification).

6. Recommendations



Llys Eleanor, Shotton, Deeside (Pennaf Housing)

There are four key areas that it is recommended should be considered by all sectors to expand the provision of extra care housing in Wales so that it becomes a significant housing choice for older people and local communities, and to maximise its contribution to the wider housing, health and wellbeing, and social care agendas.

6.1 Strategic vision

There is a clear need for a strategic vision for Wales on housing for older people and extra care housing should play a key part in the strategy to deliver this vision.

At the time of writing, the Minister for Communities and Tackling Poverty, Lesley Griffiths, made an oral statement to the National Assembly for Wales on Housing and Ageing Population. She stated that she considering establishing an expert group, which will run for a time-limited period to advise the Government in 2016 on its future policy approach to housing an ageing population.²⁹ This has the potential to enable:

- A clear understanding about what matters for older people in terms of their housing options, and the importance of including these options within housing needs assessments.
- Clarity nationally about the role extra care housing can and should play in local housing markets.

²⁹ www.assembly.wales/en/bus-home/pages/rop.aspx?meetingid=3426&assembly=4&c=Record%20of%20Proceedings

- Sharing learning about what works in the planning, design and delivery of extra care housing, exploring different exemplar service and design models including those that will attract home owners.
- The boosting of public sector capital programmes at a national and local level to improve investment in the supply of housing for older people.
- The facilitation of development through ensuring planning guidance requires people's housing to be reflected in local planning policy.

6.2 Delivering outcomes

There needs to be a better understanding of what extra care housing can offer in Wales with a consistent and ongoing approach to being able to demonstrate this which links to health and social care outcomes. The aforementioned planned national evaluation will make a significant contribution to this, but in addition developers, providers and commissioners need to work together to develop a shared and consistent approach to understanding the impact extra care housing can have for local communities and individual older people.

6.3 Advice and information

The current focus on improving advice and information services across Wales needs to take account of extra care housing. More generally further work is needed to raise awareness amongst professionals (housing, health and social care particularly) and amongst the general public to ensure the option of extra care housing is seen as a possibility and the preferred option particularly to moves to residential care. One of the challenges here will be to develop a meaningful narrative about what is meant locally by “extra care housing”, and ensuring there are clear pathways into the various services available.

6.4 Diversity, funding and innovation to deliver local solutions

There needs to be a greater degree of diversity and innovation to address the current financial challenges and to ensure services can be developed to meet the needs of local communities. Actions which will facilitate this include:

- Working with local communities to coproduce the right solutions.
- Bringing back the extra care housing capital programme to stimulate investment into the sector (drawing lessons from the Department of Health's Care and Support Specialised Housing Fund in England)³⁰
- Establishing a 'Help to Move' package to encourage older people to 'downsize'.
- Unlocking stalled sites and make best use of public land e.g., disposal of NHS estate
- Seeking other forms of public / private joint ventures to accelerate the building of more extra care housing to rent and buy.
- Producing a Welsh version of the HAPPI design criteria to promote good practice and stimulate innovation.

In the light of the above, this will mean funders, commissioners, developers and providers working together to understand local challenges and opportunities, learning from the evidence of what works elsewhere in the UK and internationally, and being ready to meet a steadily expanding extra care housing market for an ageing population in Wales.

³⁰ www.housinglin.org.uk/Topics/browse/HousingExtraCare/FundingExtraCareHousing/DHCapitalFundingProgramme/CASSHF2013-15/

Appendix 1

Social rented stock for Welsh social landlords by local authority area by the number of sheltered housing and extra care housing units of accommodation

Area	Sheltered Housing	Extra Care Housing
Isle of Anglesey	581	54
Gwynedd	689	171
Conwy	1,579	181
Denbighshire	1,494	130
Flintshire	3,017	113
Wrexham	861	54
Powys	2,311	3
Ceredigion	427	49
Pembrokeshire	921	128
Carmarthenshire	2,975	78
Swansea	1,992	176
Neath Port Talbot	663	115
Bridgend	535	78
The Vale of Glamorgan	617	42
Cardiff	1,543	117
Rhondda Cynon Taff	1,331	0*
Merthyr Tydfil	431	60
Caerphilly	1,443	102
Blaenau Gwent	798	86
Torfaen	189	78
Monmouthshire	1,311	21
Newport	1,158	161
TOTAL WALES	26,863	2,005

(Source: Annual social landlord stock returns, Welsh Government, August 2015)

The number of extra care units continued to increase, rising by 11% since March 2014 (from 1,812 to 2,005) whereas the number of units sheltered housing fell by 0.85% over the same period (from 27,094 to 26,863). View the 2014 table at: www.housinglin.org.uk/library/Resources/Housing/Regions/Wales/OSH_and_ECH_in_Wales_by_LA_2014.pdf

* There was only one local authority (RCT) with no extra care housing at the end of March 2015. However, a site has been acquired and the scheme is due for completion in 2016.

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About the Institute of Public Care

This report was commissioned by the Housing LIN Cymru and has been authored by the Institute of Public Care at Oxford Brookes University. The Institute works with central and local government, private and voluntary sectors, Registered Providers, and the NHS across Wales and the rest of the UK. We aim to enhance the impact and effectiveness of services through analysis, evaluation and redesign, help with implementing change, skills development, information management and knowledge exchange.

<http://ipc.brookes.ac.uk/>

About the Housing LIN Cymru

The Housing LIN is the leading 'learning lab' for a growing network of housing, health and social care professionals in England and Wales involved in planning, commissioning, designing, funding, building and managing housing, care and support services for older people and vulnerable adults with long term conditions.

Previously responsible for managing the Department of Health's Extra Care Housing Fund, the Housing LIN is called upon by a wide range of statutory and other organisations to provide expert advice and support regarding the implementation of policy and good practice in the field of housing, care and support services. We are grateful to the Welsh Government and housing with care providers in Wales for their support.

For further information about the Housing LIN Cymru's comprehensive list of online resources and to participate in our shared learning and service improvement networking opportunities, including 'look and learn' site visits and network meetings in Wales, visit:

www.housinglin.org.uk/Wales

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