

**Assessing for the home
setting: trusted approaches
to assessing for accessible
and adaptable homes**
Housing LIN Happi Hour
October 29th 2024



About TACT

- Established in 2022
- OT led
 - Working with a team of OTs with expertise in home adaptations
 - Strong industry connections
- A leading provider of training on assessing for equipment and adaptations
 - Trusted Assessor – a range of levels and formats
 - Equipment refreshers; reablement etc
 - Training, consultancy, assessments and more



Background

- Growing demand from an ageing population who prefer to remain living independently at home
- Poor awareness with older and disabled people and their families of the sorts of equipment and home adaptations designed to aid independent living
- Shortages of qualified staff
 - Social care teams are the statutory providers of needs assessments
 - Pressures on the role of OTs with long waiting lists in some areas
 - Unsustainable model
 - Other roles could do more – examples of nurse practitioners; pharmacists



What does this mean for care and housing providers?

- Specialist care and housing providers
 - Can adapt current housing to fit people's needs
 - Maximise and optimise their property assets
 - Waiting for assessments delays independence
- Growth in domiciliary care provision
 - Ideally placed to notice needs and act on what they see
- Discharge to assess pressure



Why delays?

“Main causes of delay include insufficient resources, lack of joint work.....”

“OT in the county council has to shut their cases down once it is passed to the district council. If the case has any questions or changes, we have to request to reopen the case again in the county council. It takes time as it could be a different OT to deal with the case”

Causes of Delays during Housing Adaptation for Healthy Aging in the UK (2019)

- Long waits for occupational therapy assessments
- At times, breakdowns in communication occurred between housing associations and adult social care teams



Outcomes due to delays

- Increased need
- Increased risk
- Mental health impacted
- Increased cost providing alternative measures

Example

Stairlift needed - £2700

- 18-month delay
- 5hrs of additional home care every week costing £4000

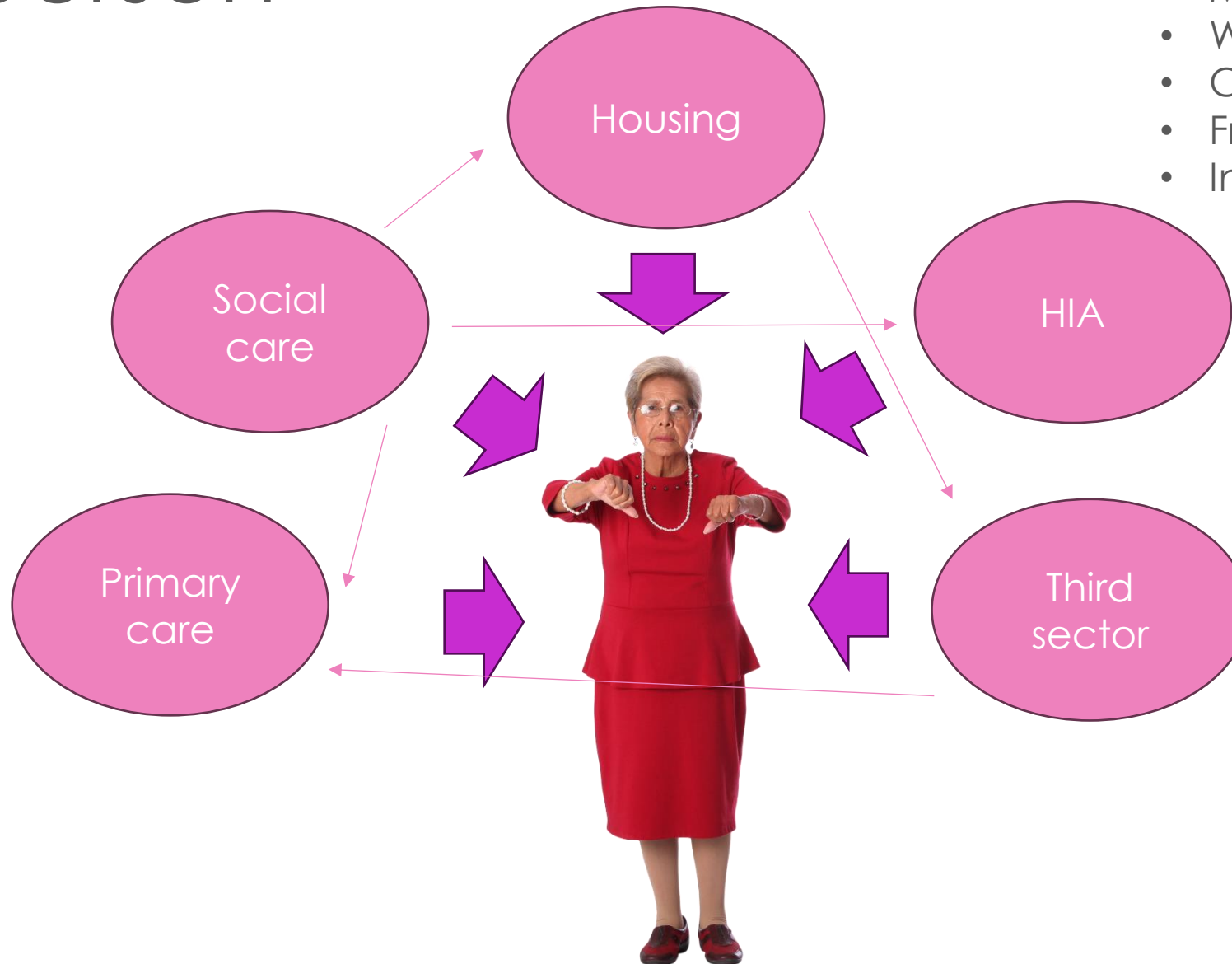


Causes of Delays during Housing Adaptation for Healthy Aging in the UK (2019)



The person

- Multiple assessments
- Multiple people
- Waiting lists
- Confusion
- Frustration
- Information lost



Adaptations – the solution

Public Health England published a report on falls prevention in 2018 which found that home adaptations resulted in a **23 per cent reduction** in hospital admissions and a financial return of investment of **£3.17** for every pound spent.



Disabled Facilities Grants

The right assessment team

4.9 Authorities should also ensure they have the right team of professionals to assess and recommend adaptations. For example, trusted assessors (in simple cases), paediatric occupational therapists, educational setting assessments and other occupational therapists and technical officers, particularly where major adaptations are required.

4.10 Trusted assessors are staff who are trained to assess people and their home environment for home adaptations in simple cases. They also know when to refer on to an occupational therapist for further assessment. It is good practice for trusted assessors to be supervised by an occupational therapist.

4.11 The most successful assessment systems involve occupational therapists and trusted assessors working together within multidisciplinary teams.

4.12 Some applicants will be assessed by a private occupational therapist. A district council must still consult the social services authority in these cases.

4.13 Whichever team makes the initial assessment, the final decision on awarding grant remains with the local housing authority. Decision making panel meetings that do not include the housing authority are strongly discouraged.

Disabled Facilities Grant (DFG) delivery: Guidance for local authorities in England (2022)



Foundations

“Under the DFG legislation, the final decision on what is “necessary and appropriate” lies with the housing teams / grant officer – but an assessment by an OT or Trusted Assessor will be a key factor in making that decision.”

“The Housing Authority has to ‘consult’ with social care (in two-tier authorities). However, the legislation does not state that the consultation has to be a social care assessment.”



Adaptations without Delay

- Report published by RCOT and HLIN in 2019 set out how other roles could handle assessments
<https://www.rcot.co.uk/adaptations-without-delay>
- Whole person approach
 - What matters to them
 - Person – Environment – Occupation – Occupational Performance (PEOP) model
- Services could be devised and transformed using the AWD model
 - Be able to handle simple cases; use the PEOP model; know when to refer a case
 - Integrate with the role of OT
 - Workforce skills
 - Operational considerations
- Proportionate level of assessment and response to their needs



Adaptations without Delay

- Encouraged the development of new specialist services
- Examples
 - Triage and signposting services such as 'front door' enquiry handling and single point of access teams
 - Integrated locality teams with housing specialists
 - Rapid response adaptations services e.g. Care & Repair Cymru
 - Technical officers, case workers, OTAs, care workers, social workers, surveyors, charity workers, asset managers etc

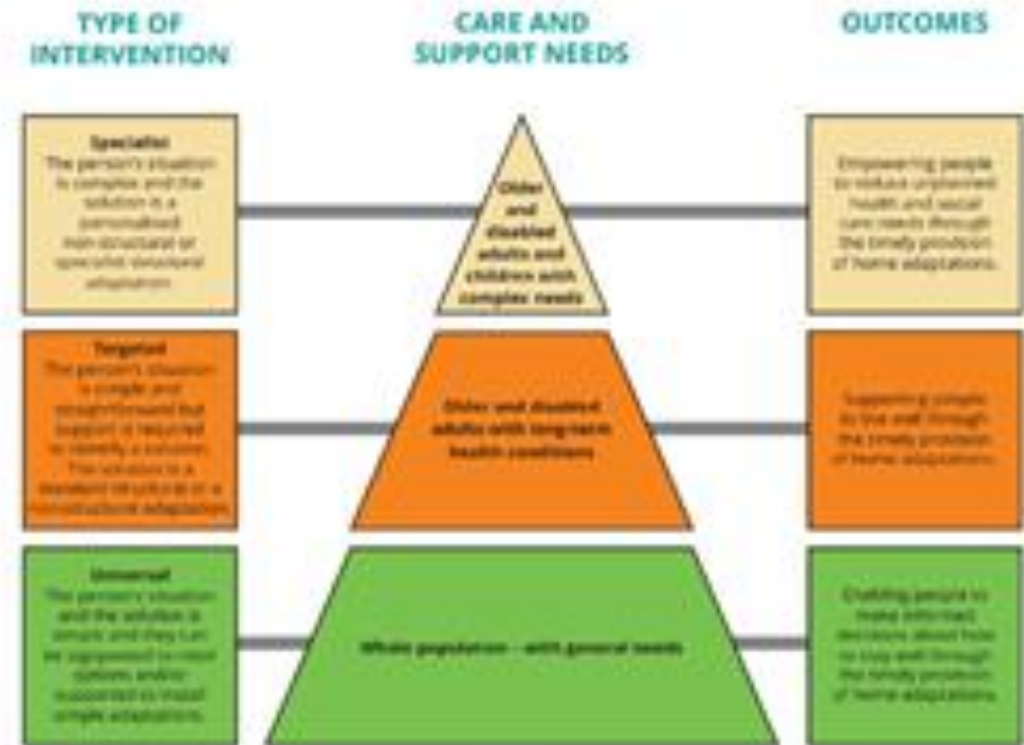
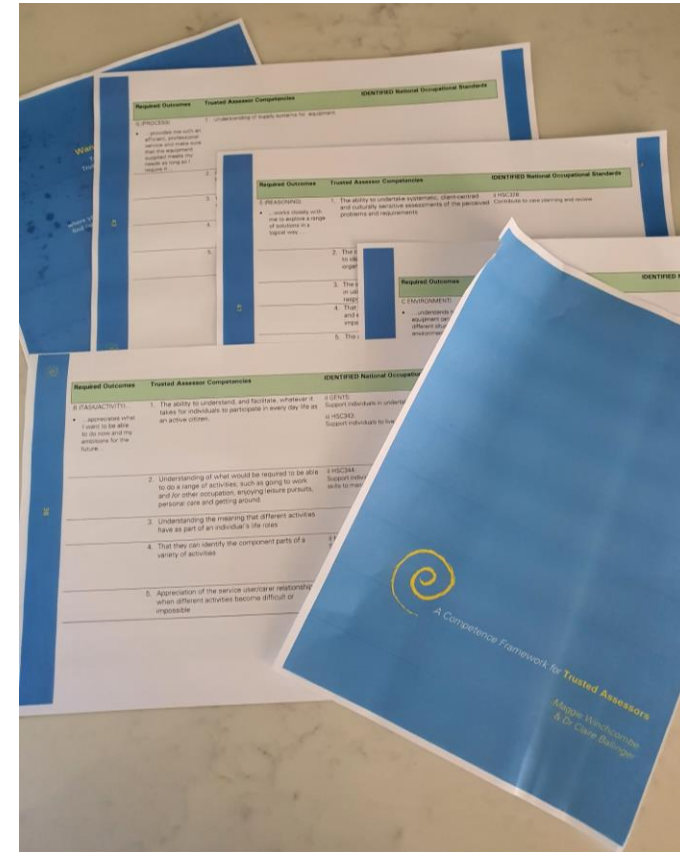


Figure 1 The Adaptations without delay framework.



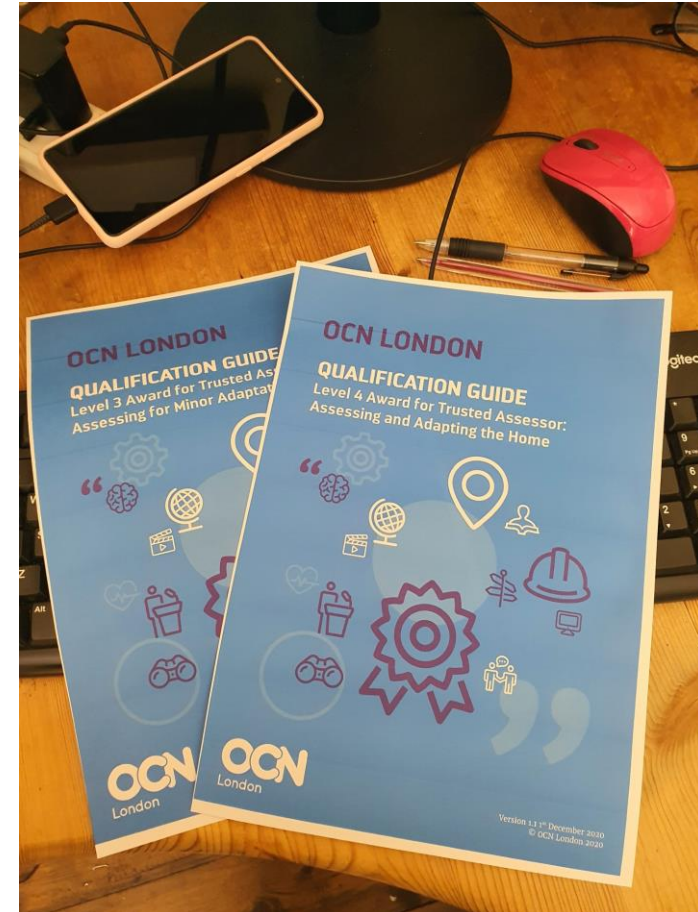
The role of Trusted Assessor

- The Competency Framework for Trusted Assessors was created in 2005
 - Download available free on TACT's website <https://trustedassessing.com/resources-a-competency-framework-for-trusted-assessors/>
- Department of Health funded this year-long project with the purpose of creating a *"national training framework that is competency-based, flexible and capable of being delivered in different settings"*
- Framework has been able to be used as the basis to understand whether a Trusted Assessor has the skills and knowledge required to provide an effective service user-led approach to equipment



The role of Trusted Assessor

- National qualifications at level three & four since 2020
- Endorsed by Foundations (England), Care & Repair Cymru and Scottish government
- Review of The Competency Framework in progress 2024-25

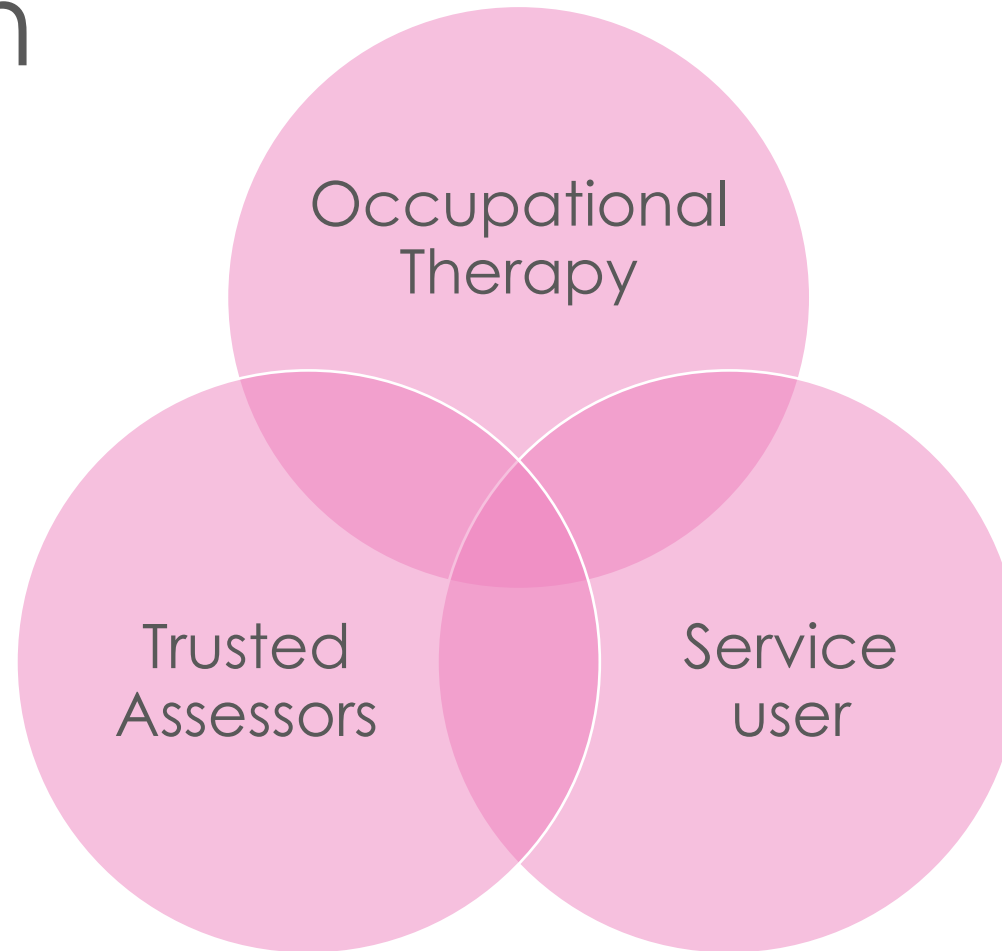


The heart of Trusted Assessor

- Steeped in OT
 - Developed by Occupational Therapists
 - Developed from OT models and theories
 - Reviewed and delivered by OTs
 - Triaging & referring to OTs based on case specifics
- Complements, not replaces
 - Boundaried
 - Supervised
 - Restricted
 - Refreshed
 - Reflective



Collaboration



Communicating with the same language



The risks vs benefits

- Liability
 - Confidence
 - Professional accountability
 - Reflection
 - Support
 - Acceptance
 - Continuous learning
- Fast assessments
 - Fewer visits
 - Cost saving
 - Reduction of falls
 - Limiting deterioration
 - Enabling Independence
 - Trusted and known staff



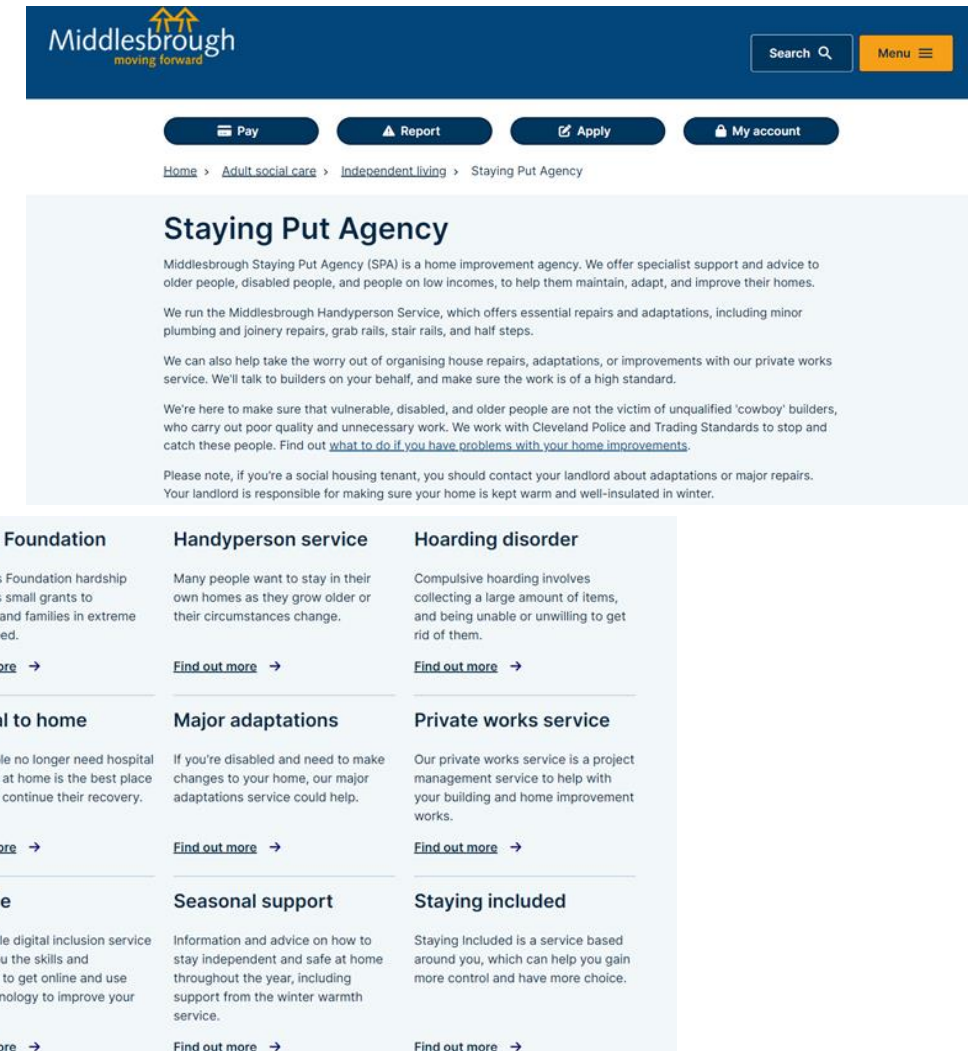
Risk reduction

- Trained to an agreed set of competencies
- Learning refreshed regularly
- Mentorship & supervision
- Structured and clearly defined boundaries; role is intrinsically linked to the role of OT
- Recognition that not everyone will assess
- Networking
- Best practice



Case study: Middlesbrough Staying Put

- Part of regional HIA, supported around 2,500 people in 2023/24
- Noticed cases requiring adjustment & decided to get training / qualifications
 - Increase in telephone assessment
- Social landlords and discharge services are confident to deal with a qualified person rather than a general tradesperson



The screenshot shows the Middlesbrough Staying Put Agency website. The header features the Middlesbrough logo with the tagline 'moving forward' and a search bar. Below the header are navigation buttons for 'Pay', 'Report', 'Apply', and 'My account'. The breadcrumb trail reads: Home > Adult social care > Independent living > Staying Put Agency. The main content area is titled 'Staying Put Agency' and provides an overview of the agency's services, including specialist support, advice, and home improvement services. It also mentions the Middlesbrough Handyperson Service and the Private Works Service. A footer section lists various services: Greggs Foundation, Handyperson service, Hoarding disorder, Hospital to home, Major adaptations, Private works service, Rekindle, Seasonal support, and Staying included. Each service has a brief description and a 'Find out more' link.

Middlesbrough
moving forward

Search Menu

Home > Adult social care > Independent living > Staying Put Agency

Staying Put Agency

Middlesbrough Staying Put Agency (SPA) is a home improvement agency. We offer specialist support and advice to older people, disabled people, and people on low incomes, to help them maintain, adapt, and improve their homes.

We run the Middlesbrough Handyperson Service, which offers essential repairs and adaptations, including minor plumbing and joinery repairs, grab rails, stair rails, and half steps.

We can also help take the worry out of organising house repairs, adaptations, or improvements with our private works service. We'll talk to builders on your behalf, and make sure the work is of a high standard.

We're here to make sure that vulnerable, disabled, and older people are not the victim of unqualified 'cowboy' builders, who carry out poor quality and unnecessary work. We work with Cleveland Police and Trading Standards to stop and catch these people. Find out [what to do if you have problems with your home improvements](#).

Please note, if you're a social housing tenant, you should contact your landlord about adaptations or major repairs. Your landlord is responsible for making sure your home is kept warm and well-insulated in winter.

Greggs Foundation The Greggs Foundation hardship fund makes small grants to individuals and families in extreme financial need. Find out more →	Handyperson service Many people want to stay in their own homes as they grow older or their circumstances change. Find out more →	Hoarding disorder Compulsive hoarding involves collecting a large amount of items, and being unable or unwilling to get rid of them. Find out more →
Hospital to home When people no longer need hospital care, being at home is the best place for them to continue their recovery. Find out more →	Major adaptations If you're disabled and need to make changes to your home, our major adaptations service could help. Find out more →	Private works service Our private works service is a project management service to help with your building and home improvement works. Find out more →
Rekindle The Rekindle digital inclusion service can give you the skills and confidence to get online and use digital technology to improve your life. Find out more →	Seasonal support Information and advice on how to stay independent and safe at home throughout the year, including support from the winter warmth service. Find out more →	Staying included Staying Included is a service based around you, which can help you gain more control and have more choice. Find out more →

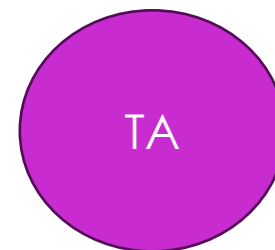
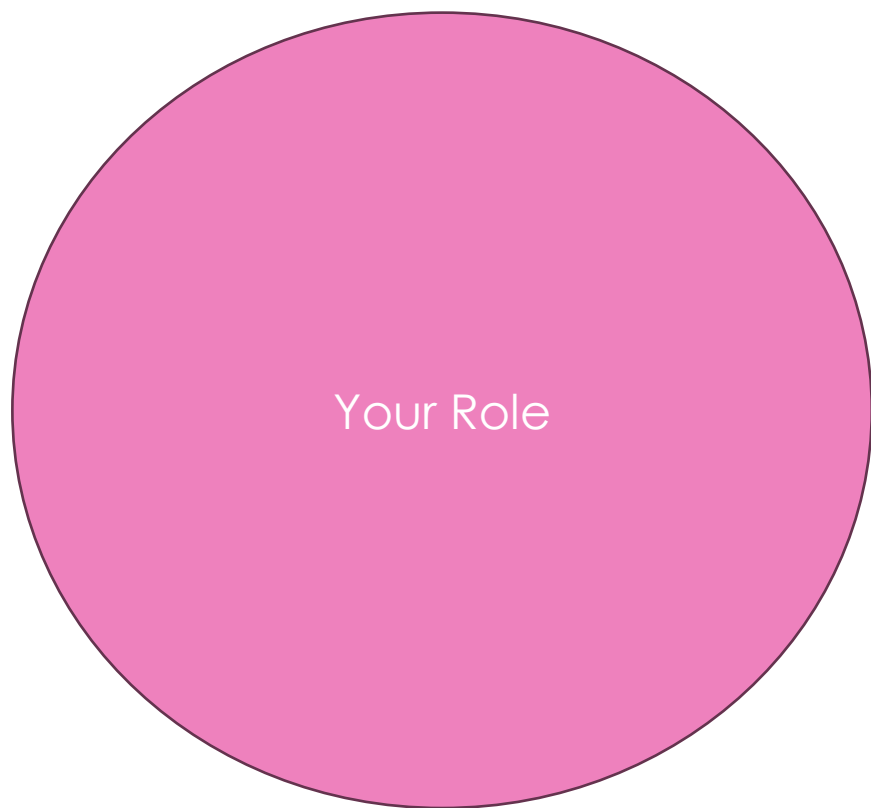


Assessors in care and housing settings

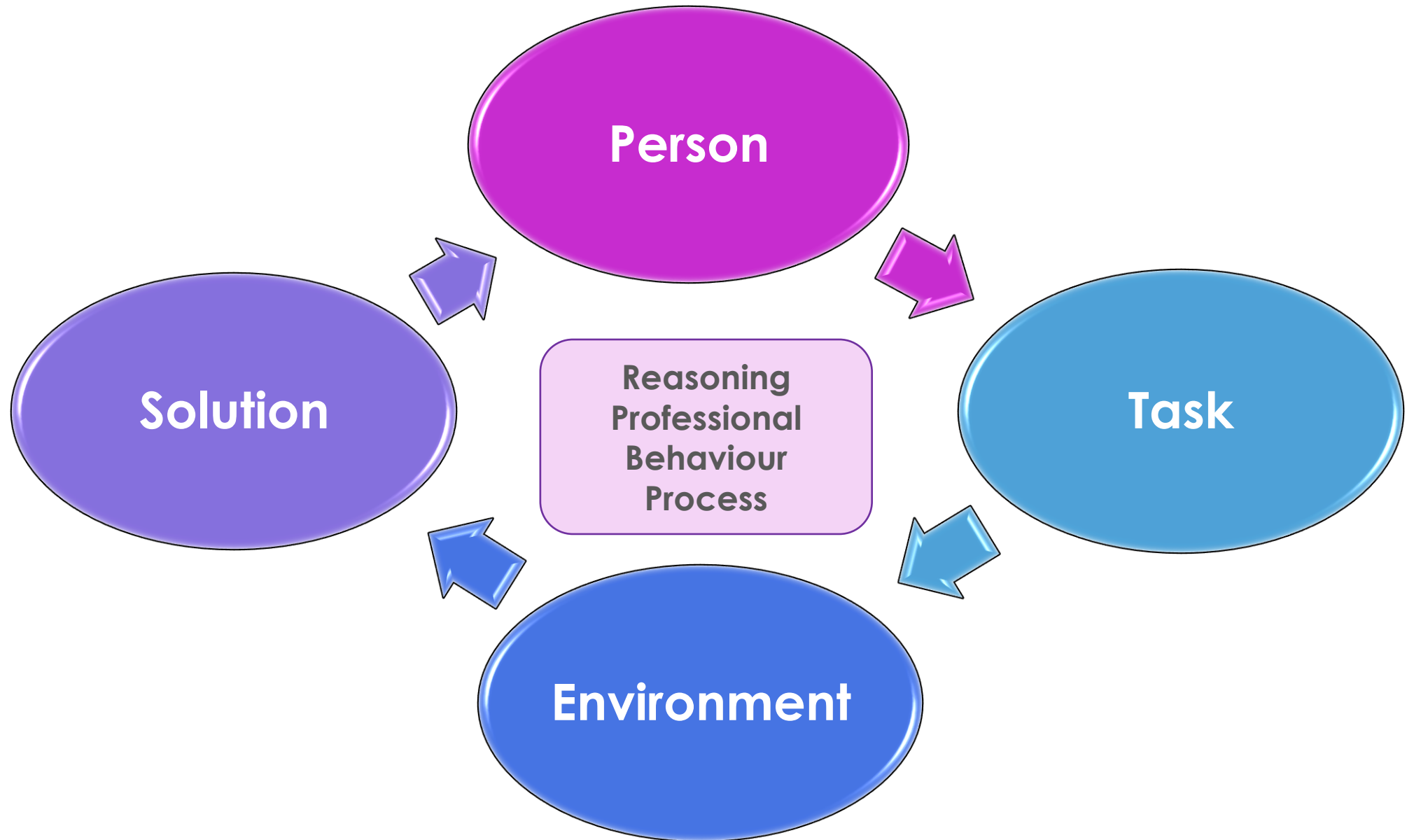
- There is a noticeable increase in the number of care and housing providers looking to be qualified as assessors of equipment
 - Housing Associations
 - Housing with Care / Extra care / Independent Living Schemes
 - Domiciliary and live-in care organisations
 - Care and nursing homes
- They are ideally placed to notice needs
- With the right skills they can act
- Drive to improve service levels, minimise voids, be able to provide suitable care and housing for people with needs



How does Trusted Assessor fit?



Trusted Assessor model



When to refer to an OT



1. If the person does not have capacity
2. When the person has multiple conditions that impact the ability to complete the task
3. When the condition is fast declining
4. When the environment is complex to adapt
5. When the person can no longer transfer from one seat to another independently
6. When the person has a difficulty that a Trusted Assessor solution would not support
7. When your solution will impact others living in the home
8. When the solution is unsafe



Summary

- Pressures and shortages have pushed new organisations to engage with assessing for equipment
- Training and qualifications and service reimagining can lead to faster deployment of equipment
- Assessing can be an additional role
- It fits well with a surprisingly wide variety of roles around the person
- Frees the traditional roles to focus on complex needs
- It is a sustainable, future-proofing trend



Future roles

- Peer assessors – Australia mentoring project
- Self-assessment
- Drop in centres
- Community projects
- Voluntary Sector
- Fire Service
- Ambulance Service



Trusted Assessing & Care Training

- TACT is coordinating the review of *The Competency Framework for Trusted Assessors* during 2024-25, if you would like to be involved, please contact us
- Phone
 - 01626 879528
- Website
 - <https://trustedassessing.com>
- Email
 - info@trustedassessing.com

