

Institute of Public Care

Housing for older people in Wales: a sector review of sheltered housing

January 2017



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Report

1 Introduction

There has been increasing attention given recently to the potential of housing and housing related services to contribute to the health and well-being of older people in Wales, both now and in the future. This attention has tended to focus on the role of extra care housing with less consideration given to the existing significant stock of sheltered housing across the country. Given this, the Institute of Public Care at Oxford Brookes University (IPC) has carried out a rapid sector review to provide some insight into the current challenges and opportunities presented by this form of housing for older people, so as to ensure a better understanding of its potential in the current strategic environment and how this potential could be better realised. This review is intended to complement the two related reviews carried out recently by IPC: [Extra Care Housing in Wales: A state of the nation report](#) (for the Housing LIN) and [The Care Home Market in Wales: mapping the sector](#) (for PPIW).

This has been a rapid and high level review which has drawn on the views of a small number of providers and commissioners of sheltered housing to inform recommendations developed by IPC. These views were gathered in both face-to-face and telephone interviews in November – December 2016. All contributions have been anonymised, but thanks are given to contributors for providing their expertise and time (see end of the report for details).

2 Background

“Sheltered housing” is a form of specialised housing for older people that dates back to the Middle Ages with the development of Almshouses, but has moved on over time to offer a varied but not always modern form of housing for older people.

So, much was developed at a time when it was seen as “*part of a continuum sitting between general needs housing and the higher care provided in residential care homes; it focused on people with lower needs, who often moved in soon after retirement*”¹.

However, changing demographics and expectations, alongside a shift towards enabling people to remain living within their own homes, has presented this model of housing with a variety of challenges. Given that the current stock of sheltered housing is probably the highest value asset predominantly owned for older people in the public

¹ Bligh, J & Kerlake (2011) A Strategic Housing for Older People Resource Pack. Housing LIN and ADASS

domain, then the quality of that stock and how that asset is used is critical. Once spent there is unlikely again to be an investment of equivalent value.

There are two types of housing traditionally described as “sheltered housing”, although this differentiation has become blurred and may not always be apparent to existing or potential residents and their families.

Category 1 housing: this is typically housing which is designed as a community for older people (although may or may not meet current expectations around design), and may have an alarm system but would not have other support services provided. Often this consists of a cluster of bungalows, or a small block of flats, but it takes many different forms.

Category 2 housing: this typically includes some form of housing related support as well as an alarm system; often, but not always, it would include communal facilities such as a communal lounge.

In addition to these “categories” of sheltered housing, it is important to be aware of the provision of housing that has been designated for older people: this designation focuses on how the housing is allocated (ie to people over a certain age, normally 55), but with no other specialist older people services necessarily attached to it. This review has not specifically sought information on this type of housing, but it does play a part in any local market for housing for older people.

3 Policy drivers

3.1 Demographic trends

The demographic trends across Wales are well known, with a significant proportion of the population being over retirement age (more so than elsewhere in the UK), and with this proportion expected to increase over time². Projections suggest an increasing proportion of older old people amongst this population group, with the potential implications of this for demand on health and social care services. This projection also has implications for demand for sheltered and other forms of housing for older people which may not meet accessibility or other standards, or be otherwise fit for the future. It should be noted that the picture is not consistent across Wales and from the interviews, it is clear that local characteristics and trends need to be explored and understood.

3.2 Current policy drivers

There is a clear acknowledgement in Welsh policy of the importance of housing for older people in promoting their health and well-being, although less emphasis has been given to the need to develop aspirational forms of housing for this population group.

² See, for example, Public Policy Institute for Wales (2015) Housing for Older People in Wales: an evidence review

The Strategy for Older People in Wales sets out the ambition that “*older people have access to housing and services that supports their needs and promotes their independence.*”³

In addition, one of the outcomes within the recent National Outcomes Framework for people who need care and support, and for carers who need support (March 2016) is:

“I live in a home that best supports me to achieve my well-being.”

The Welsh Housing Quality Standards requires all social landlords to improve their housing stock to an acceptable level by 2020⁴: “*we believe that everyone in Wales should have the opportunity to live in a good quality home within a safe and secure community*”. As at March 2016, 79% of all social housing meets these standards, however within that figure 96% RSL properties meets standards against 54% local authority properties.⁵ This differential is likely to be a reflection of the age and condition of local authority stock, and is an issue that is highlighted within the review. However, this Standard takes a relatively constricted view of the potential needs of the older resident, requiring that “*the accommodation provided within the dwelling should, as far as possible, suit the needs of the household (eg specific disabilities)*”. Examples include:

- *The dwelling should provide sufficient space needed for everyday living and be appropriate for household numbers.*
- *Dwellings should have rooms that can accommodate sufficient furniture and circulation space to meet the needs of the residents. Circulation space should not be reduced to the point where rooms are cramped and inconvenient.*
- *A lack of storage can impede upon the actual space dwellings provide for everyday living.*
- *Where existing dwellings are intended for residents with specific needs, they should, wherever possible, be improved so that the layout of the dwelling reflects current good practice.*
- *All necessary aids and adaptations to meet the specific requirements of any residents, including those with disabilities, should be provided.*
- *The quality of housing provided by landlords is not only affected by the dwelling itself, the area outside a dwelling is equally important.*

If housing for older people, including sheltered housing, is to reflect the aspirational needs and expectations of current and future older people in Wales the development and adoption of a more aspirational standard for all forms of housing for older people would seem advisable, potentially reflecting the HAPPI principles⁶. The latter set out not only the minimum standards for accommodation and services but aim to set a benchmark that will render accommodation fit for the future aspirations of its intended customers.

³ Welsh Government Strategy for Older People in Wales 2013 – 2023 p13

⁴ <http://gov.wales/topics/housing-and-regeneration/housing-quality/welsh-standard/?lang=en>

⁵ Welsh Government First Statistical Release (October 2016) Welsh Housing Quality Standards as at 31 March 2016

⁶ So, for example All Party Parliamentary Group on Housing and Care for Older People (2016) Housing our Ageing Population: Making Retirement Living a Positive Choice

The availability of capital funding in the form of grants from Welsh Government is constrained, however the Cabinet Secretary has said that “*the £1.3bn allocated over the term of this government to support the delivery of 20,000 affordable homes and complete the task of meeting the Welsh Housing Quality Standard highlighted the government’s ambition in this area*”⁷. The move towards whole system working, and in particular the partnership agenda across health and social care, creates the potential to develop joint funding approaches or to tap into other resources such as land, however this potential opportunity needs to be seen in the context of the current financial climate.

Most importantly, this review has been carried out at a time of change and uncertainty particularly in terms of the revenue funding for sheltered and other forms of supported housing and this is impacting on strategic planning and decision making. As noted elsewhere in this paper, there is considerable concern about the impact of the Local Housing Allowance alongside potential cuts in Supporting People grants. It is described at a UK wide level in the research review of supported housing (including sheltered housing) for the Department of Work and Pensions⁸: participants highlighted the potentially significant impact of the Local Housing Allowance cap on the stability and sustainability of the sector and identified the following considerations for long-term stability which are relevant to this review:

- *A clear but flexible definition of supported housing, which focuses on users and outcomes, rather than provider type and housing model;*
- *A stable and secure funding system for both housing and support costs that allows commissioners and providers to plan strategically and with certainty;*
- *A stronger role for broad local partnerships to coordinate the funding, strategy and delivery of supported housing alongside the integration of health and social care and other local preventative initiatives;*
- *A more consistent approach to regulating supported housing and monitoring quality and value for money, especially in England; and*
- *A well-planned and communicated transition process to any new funding system.*

The trends in other markets are also relevant, particularly that of care homes and extra care housing. For example, where sheltered housing provides an attractive, age friendly environment in which care and support can be delivered as needed by individual residents, this could and should affect demand for residential care. Alternatively, where there is significant extra care housing development in an area where sheltered housing is of poor quality, this is likely to impact on demand for the sheltered housing and should be taken into account in considering its future role within that community. Sheltered housing is one part of a wider “accommodation” offer for older people with a variety of care and support options.

Other changes within local communities will also have an impact on sheltered housing, so for example the decline in local facilities and amenities such as post offices and shops will make the location of sheltered housing less appropriate for its older residents, particularly where public transport is poor.

⁷ <http://gov.wales/newsroom/housing-and-regeneration/2016/161102-carl-sargeant-sets-out-plans-to-deliver-20000-affordable-homes/?lang=en>

⁸ Blood, I et al (2016) Supported accommodation review: The scale, scope and cost of the supported housing sector Department of Work & Pensions

4 Current market

4.1 A range of providers

Housing associations (or registered providers) and local authorities provide sheltered housing within the social housing market in Wales; in some cases the provision has been part of a stock transfer. This rapid review has not included the private sector at this stage, but private provision is understood to be relatively limited, particularly in the context of the numbers of older owner occupiers across the country.⁹

There is variety in the degree to which individual housing organisations focus on provision for older people, so in some cases this is the sole focus for specialist organisations, or forms a significant part of an organisation's provision; in other cases it is a relatively small element of an organisation's overall housing portfolio. Within those organisations involved in this rapid review the percentage of total stock that was sheltered housing ranged from less than 10% to more than 40%. This has implications for how and to what degree services are being actively reviewed, modernised and developed. It also has implications for the affordability for individual organisations of carrying out extensive refurbishments and remodelling exercises, and the timescales within which such exercises can be delivered.

Many of the providers are working across a number of local authorities, and in some cases across regions. Given the different approaches being taken to taking a strategic view of housing for older people by local authorities this does create challenges for housing associations seeking clear guidance, or seeking to work co-productively to review and improve provision. This variance is likely to become more problematic when the implications of changes to revenue funding are better understood, and regions or local authorities seek to make best use of the assets within their areas.

4.2 Level of supply

Sheltered housing forms a relatively small proportion of overall social housing: "*The most recent data suggests that there are 189,905 units of general needs housing stock, 34,277 units of supported including sheltered stock and 2,041 units of extra care stock.*"¹⁰ The same report suggests that the majority of these are rented, with a small number of shared ownership and leasehold, but acknowledges this is based on old data. The level of understanding at a local level of current supply is unclear, but this is clearly an area where the development of strategic approaches will require a robust understanding of what provision there is currently, as well as what outcomes are being delivered.

The spread and level of sheltered housing varies across Wales and is not necessarily in line with current numbers of older people within local populations, reflecting changing demographics and strategic approaches to housing for older people. The table below provides sample information to highlight the spread across the country of sheltered housing with the lowest provision per 1,000 people aged 65 plus in Torfaen, and the highest in Flintshire. It should be noted that this looks at the population over 65, whereas many schemes are let to people over 55; this does not include schemes which

⁹ See discussion in Extra Care Housing in Wales: a State of the Nation report.

¹⁰ Public Policy Institute for Wales (2015) Housing for Older People in Wales: an evidence review

are designated for older people but do not fall into the traditional definition of sheltered housing.

Table 1: Provision of social rented sheltered housing 2015-2016 (illustrative sample)

Sample local authority	Total sheltered housing (LA & RSL)	Population over 65 (Daffodil)	Stock per 1,000 over 65
Torfaen	189	18,490	10
Cardiff	1,537	86,670	18
Carmarthenshire	877	43,110	20
Ceredigion	410	17,850	23
Blaenau Gwent	816	13,600	60
Newport	1,640	25,980	63
Powys	2,315	35,380	65
Denbighshire	1,538	22,550	68
Flintshire	3,001	32,010	94

Source: Stats Wales and Daffodil

If there is to be a robust approach to understanding and meeting the housing needs of older people, which reflects the aspirations of the whole older population (not just those who rent), there does appear to be a need for a detailed analysis of existing assets, whether in the form of housing or care homes. This will assist in understanding the options available to older people when their existing home is no longer meeting their needs, how this varies in different parts of the country, and how to ensure the best use is made of resources at a time when these resources are increasingly constrained. It will also highlight where there is overprovision, or where existing resources could be better directed towards other population groups.

5 Trends and opportunities

The review has highlighted a variety of trends within the sector, relating to the buildings themselves, the support provided into them, demand trends, and the role sheltered housing is perceived to play within the wider housing, social care and health agenda. It is striking that even within a relatively small sample of providers there is significant variation in terms of the current status of their sheltered housing; anecdotally there is also significant variation in the degree and nature of the strategic approach being taken by local authorities and/or regional partnerships. This section describes these trends and the opportunities that could be considered going forward.

5.1 The “bricks and mortar”

Amongst those providers interviewed, organisations are providing a range of age and type of buildings: for example, these include original almshouse provision, schemes

developed post war, schemes built in the 1970's and 1980's, and schemes built this century. Many schemes continue to provide excellent housing and support for their residents, and interviewees cite examples of work carried out to ensure they met modern aspirations and expectations. However, on the basis of these interviews it is apparent that challenges include:

- Design: for example bedsitter or very small one bedroom accommodation which is not felt to meet current expectations, and which is likely to have falling demand over time.
- Accessibility: examples were provided of accommodation which could only be accessed by stairs (and where stair lifts could not be fitted), external environments which were inaccessible, such as including external steps or being located on hills.
- General condition: schemes had not always been prioritised for refurbishment particularly given the uncertainty of their future role. Some schemes were unattractive and had an institutionalised, old-fashioned feel.
- Location: there were schemes in isolated locations, or in locations which had changed over their lifetime and so now lacked community resources such as local shops.
- Assistive technology: although all schemes had some form of alarm system, there appears to be limited use of, or demand for, more sophisticated forms of assistive technology. It was suggested that although there had been pilots which had developed or showcased the potential of assistive technology these had not become mainstreamed as part of the wider health and social care system.

A number of interviewees describe how a review of all sheltered housing against agreed standards assists in the development of a strategic approach to the investment or disinvestment in sheltered housing. Whilst there are examples of this having taken place in Wales, there is no consistent approach measuring provision against an agreed set of criteria looking across condition, design, location, and taking into account local strategic approaches, and current and future aspirations of local communities.

Given the current pressures on the wider housing and care system a more robust and consistent approach is needed to ensure best use is made of resources:

“Whether the stock is in the private sector, held by Registered Social Landlords / housing associations, or by the local authority, there is, as a part of reviewing supply, a need to explore how this might meet future housing need. This could entail reviewing quality (projection of long term maintenance costs), accessibility (whether the whole scheme is wheelchair accessible), value (land and property), location (proximity to neighbourhood facilities) and tenure (is this for all sectors of the community?).”¹¹

5.2 Demand for services

It is common now for sheltered housing to be available for people over the age of 55, rather than being restricted on the over 65's or indeed the “older” old. From the interviews, it is apparent that this, perhaps unsurprisingly, presents challenges where people who are still at work, and who potentially have “other” support needs such as

¹¹ Bligh, J and Kerlake, A (2011) Strategic Housing for Older People Resource Pack Paper A3: Understanding the local market for older people's housing, care and support. ADASS and Housing LIN

substance misuse or mental health are being allocated to sheltered housing. In a number of cases, interviewees described how current healthy demand would be affected if the schemes were allocated only to people over 65, although the reasons for this varied and could be associated with the quality of the housing as much as overprovision in a given area.

In addition, there are schemes where the design, location or condition/appearance of the buildings has a significant impact on its desirability; some interviewees suggest that “sheltered housing” as a concept is considered undesirable, and suggest that a move away from this as a name might be helpful.

There is concern at potential competition from new forms of housing for older people which have been built or are being planned in a given area, with the impact this will have on demand for existing schemes. Whilst this is cited as an example of a lack of joined-up thinking or planning for older people in a given area, it clearly suggests that current provision is not of an appropriate standard, and a stronger strategic approach may result in the decommissioning of schemes.

The level and types of support available within a scheme can also affect desirability: where there is a good level of desirable services the scheme is likely to be more sustainable than one with little or no relevant support activities. It is therefore useful to understand which support services are most highly sought after, are effective at delivering outcomes for older people, and so which of these will fit best within the range of older peoples’ and other types of supported housing.

It is understandable that in order to ensure best use of sheltered housing as an asset for the local community the age criteria could be varied to include “younger” people with support needs who would benefit from living in this type of community. However, this does and could present a challenge in terms of its identity and attractiveness as a choice for older people. There may be a case for having a form of supported housing that targets a particular age group or level of frailty associated with age with both design and support reflecting the needs of this group.

5.3 Housing related support

It is clear that there are different approaches to the provision of support in sheltered housing schemes and no consistent sense of what is seen to be good practice across Wales.

There are examples of scheme managers who are no longer resident on site but otherwise their roles reflect the traditional “warden” service, with support provided to all residents. There are examples of the introduction of a needs based approach to the provision of support, and in some cases this is also on offer to older people living in the wider community. Similar differences are also apparent in the different approach to funding support services, ie whether they are funded in part or entirely by Supporting People funding, or by Housing Benefit.

Clearly local variation to meet local need is not an issue in itself, but given the uncertainty around both Supporting People and Housing Benefit in the future there does seem to be a case for Welsh Government to clarify the model of support (and its funding

mechanism) for the future. This will also clarify the potential opportunities around the provision of support for older people living in other forms of housing.

5.4 A resource for the wider community

Whilst a number of providers describe the role of schemes within local communities as a local resource or community hub, this approach is not being consistently developed or promoted. This may reflect the lack of strategic guidance on the opportunities that could or should be presented by the communal facilities often associated with sheltered housing.

There are examples of sheltered housing schemes offering additional services, such as providing a reablement service to facilitate hospital discharge, but on the basis of the interviews this does not appear to be very common.

5.5 Strategic planning

Given the current divergence in provision and approach across Wales, it is not surprising to find a similar divergence in the strategic approaches being taken to understand whether current provision is fit for the future, and how to tackle any challenges that understanding presented.

It appears from interviews that providers are using the Wales Housing Quality Standards programme as an opportunity to review existing schemes, but it is less clear whether this includes consideration of best practice in older people's housing design or taking a more strategic review of housing for older people drawing in all types of provision.

The lack of certainty around revenue funding is certainly hampering any strategic approach, as it is not clear whether schemes will be financially sustainable into the future. Given this, it is even more important that providers and commissioners work together to understand, plan for, and develop the future market for housing for older people. There needs to be a shared understanding of the risk associated with investment, the need to disinvest, and how to ensure any revenue funding is targeted and delivers outcomes as effectively as possible. There may be a role for Welsh Government or other national agencies in promoting effective strategic approaches in this area as a valuable way of developing capacity and capability across the system.

6 Housing for older people in the future?

This rapid review of the sector highlights the need for a strategic approach to the commissioning and delivery of housing, and specifically sheltered housing, that is age friendly, enables care and support to be provided, and supports the wider health, housing and social care agendas. The following sections consider the implications of this for local authorities and for providers of sheltered housing, albeit with many of these extending to a wider consideration of housing for older people.

6.1 The agenda for local authorities

As noted above, there are many strategic drivers influencing the agenda for local authorities in this area. So, for example, 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 financial pressures and uncertainties around revenue funding mean that local authorities need to be clear how they are making the best use of what is likely to be a significant local asset within their communities.

The mechanisms for developing a strategic approach are varied, but typically include considering research and good practice; analysing population need, demand, existing services and resources; and reviewing performance and activity data. The strategic approach can then be set out in a Joint Statement of Strategic Intent, Market Position Statements, Commissioning Strategies and Business Plans; the key here is to be clear on the purpose and audience for the document. So, the specific activities required in relation to sheltered housing are:

- Develop an understanding of what housing there currently is within the region, how well it is supporting outcomes for older people, and whether it is fit for the future.
- Develop a shared understanding across partners of what good looks like in terms of housing for older people, so as to enable the assessment of current provision which is robust, but also to ensure it reflects local strategic and operational drivers. This is likely to include:
 - Design standards which ensure housing (internally and externally) is accessible and attractive.
 - The use of design to enhance the quality of life of all residents, notably, but not only those living with dementia.
 - Location which enables social inclusion and engagement, and which supports the development of resilient communities.
 - Housing as a community resource, thus providing benefit to those living nearby as well as within schemes.
- Develop a shared understanding of how best to commission and deliver support for those living in this form of housing, which delivers outcomes for residents and is both affordable and sustainable.
- Ensure the delivery of housing that sits within and complements the wider range of services within a locality, and supports the delivery of wider outcomes, particularly around well-being.
- Develop a partnership approach to working with providers which maximises the potential to draw on their expertise and resources to deliver the outcomes needed for local communities. This should include drawing providers in to contribute to the agendas of local and regional health and social care partnerships, facilitating any cross sector working as needed to deliver outcomes.

6.2 The agenda for providers

Whilst there is significant variety in the type of providers of sheltered housing, each will want to ensure their business planning takes account of key risks as well as key opportunities in the areas within which they work. It is therefore critical that they have a good understanding of the degree to which their asset is fit for purpose, both now and into the future. They will also need to be aware of the potential market for their services, and how demand and expectations are likely to shift in the future; this should include a good understanding of the requirements of local housing, health and social care commissioners in terms of housing for older people. Finally, given the current uncertainties around revenue funding in particular, they will need to be planning options for addressing any threats to their business model.

So, the specific activities in relation to sheltered housing are:

- Develop a good understanding of current stock, including an appraisal against good practice in older people's housing design, and an assessment of the outcomes being delivered by current services.
- Work with local health and social care commissioners to ensure a clear understanding of how sheltered housing fits within the local health and well-being agenda, as part of the wider system.
- Test the future market for this (and other) forms of housing for older people, drawing on waiting list information, but incorporating a wider scan of potential demand understanding the reasons for the housing choices made by individuals, their families and professionals.¹²
- Develop an organisational vision for housing and related services for older people which can be promoted within the sector, and in particular with commissioners and other potential funders.
- Develop a robust strategy or business plan for sheltered housing as a form of housing for older people, which includes sensitivity analyses testing out the impact of likely changes to revenue (and capital) funding in the future. This should include a planned approach to any redesign or decommissioning of existing services.
- Proactively engage with health and social care partnerships locally and regionally to support the delivery of outcomes for older people.

7 The Institute of Public Care

This report has been written by Juliet Bligh from 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.

Recent work of relevance to this paper includes:

¹² See, as an example approach Institute of Public Care (2007) [Anticipating Future Needs](#)

- [Extra Care Housing in Wales: A state of the nation report](#) for the Housing LIN.
- [The Care Home Market in Wales: mapping the sector](#) for Public Policy Institute Wales.
- Assessing the housing needs of older people in Wales – a discussion paper produced with the Housing LIN, and provided as evidence to the Expert Working Group on Housing for Older People.
- [Strategic Housing for Older People: a resource pack](#) – a series of briefing papers on how to develop strategic approaches to the planning, design and delivery of housing for older people (ADASS and the Housing LIN).

The Institute of Public Care would like to thank the time and expertise provided by the following organisations to contribute to this rapid review of sheltered housing in Wales at the current time.

Caerphilly CBC

Family HA (Wales)

Gwalia

Powys

United Welsh

Derwen

Flintshire CC

Linc Cymru

RCT

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January 2017**

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