

A GUIDE FROM THE HOUSING FORUM
JANUARY 2021



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Older and Wiser

A practical guide for developing,
commissioning and operating
age-friendly homes

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About this guide

Our society is ageing fast. By 2030, one in five people in the UK will be 65 or older. But we are failing to keep pace with the types of homes best suited for older people.

Outdated, unsuitable and under-supplied. Housing for older people in the UK is seriously under-catered for and half of what there is was last renovated more than 30 years ago.

Providing better and more suitable housing provision enables people to live more independently for longer. This is relevant as housing providers and institutional investors could be major players in a mixed market of provision and offer much wider choice and lifestyle benefits.

The purpose of this guide is to draw on the vast experience of Housing Forum members who procure, design, make, build and maintain homes across the UK to inform the direction of older persons housing provision at both a local and national level.

We accept that when it comes to addressing the housing need for our ageing population, there are currently more questions than answers. But intelligent and transparent debate can guide us, which is precisely what this guide aims to do.

Working Group Chairs

Tom Titherington (Chair)

Executive Director - Development and Commercial, Sovereign

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Executive Director, Ian Williams Ltd

Acknowledgements

The Housing Forum would like to thank all those that contributed to this report, in particular those who have provided case studies, and to the sponsors who have provided financial support for the publication.

A special thanks to **Housing LIN** for their collaboration and support.



Housing LIN

Connecting people, ideas and resources

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Foreword



Mike Turner, Executive Director, Ian Williams Ltd, and Deputy Chair, Working Group explains the five point guide as a key reference point.

We are pleased to present this guide which is the result of a cross-sector group of Housing Forum members who procure, design, make, build and maintain homes across the UK, bringing their experience to bear on the issues of one of the sector's current greatest challenges: how to house an ageing population.

The challenge of planning housing for an ageing population is not just a personal one affecting the retired - it is a major theme in debates about housing policy encompassing housing, care and health sector partners. By 2030, one in five people in the UK will be 65 or older, so it is no surprise that the sector is asking how to build homes and adapt existing stock so they are suitable for this fast-growing demographic.

Though most of the report was written before the pandemic, the principles it espouses, in particular the need to build communities, design for well-being, and provide access to outside space, have proved to be more important than ever.

We examine the challenges, look at solutions, and going one step further, have devised a practical model that every housing provider can use today. We hope in doing so we encourage housing providers to take their first steps into the market.

Of course, we accept that when it comes to addressing the housing crisis surrounding our ageing population, there are currently more questions than answers. But intelligent and transparent debate can guide us, which is precisely what this guide aims to do.

I'd like to thank all who contributed to the report, in particular the Group's Chair, Tom Titherington.



Introduction

Outdated, unsuitable, and under-supplied. Housing for older people in our society is seriously under-catered for and half of what there is was last renovated more than 30 years ago. By any measure we're failing miserably to deliver.

Our society is ageing fast. In mid-2016 there were 1.6 million people aged 85 and over; by mid-2041 this is projected to double to 3.2 million. But we are failing to keep pace with the types of homes best suited for older people. Just a few thousand specialist homes are built each year.

There are 730,000 retirement housing units across the UK, according to the Elderly Accommodation Counsel (EAC). More than half these homes, 52%, were built or last renovated over 30 years ago.

The *Later Living: Housing with Care* guide, published by the Urban Land Institute (ULI), estimates there will be a shortfall of almost 70,000 homes with care in the next decade. The ULI guide points out that better housing provision for older people brings other benefits to society. Those living in properties with care provided and run by the ExtraCare Charitable Trust, save the NHS £1,994 per person on average over five years, reducing NHS spending for residents by nearly two fifths.

Providing better and more suitable housing provision enables people to live more independently for longer.

If we are to address this failure of supply it needs more focus, and ingenuity from government, housing providers and local authorities. And it's not just about increasing numbers. It's also about giving people the choice around how they manage their care, finances and living situation as they age, from active downsizers to those requiring greater support.

There is a need for a raft of choices, of differently sized specialist and non-specialist properties with a range of facilities and price points; the limited range of current options becomes outdated too quickly.

Yet good intentions are one thing; acting on them is another, and for those looking to commission and develop much needed specialist housing, the landscape and barriers can be bewildering and the risks considerable. It's made even more difficult by local plans that don't make provision for older persons housing, a dire lack of funding for those at the lower income end and a general culture of staying put in family homes, even if they are unsuitable.

Nevertheless, social housing providers are nothing if not inventive and many of those featured in our case studies are successfully negotiating these barriers.

This guide offers a pooling of their expertise and experience to offer help and encouragement. It will be useful for anyone in the public or private sectors looking to develop or commission new accommodation or repurpose their existing homes for older people.

Our guide doesn't aim to provide all the answers, or a methodology in detail, to what can be very difficult challenges. But we believe we've provided a useful steer for those taking their first steps.

Analysis



Tom Titherington, Executive Director - Development and Commercial, Sovereign and Chair, Working Group provides his analysis.

Of the many imbalances in the housing market that exist today, one which receives comparatively little attention is the challenge of an increasingly ageing society.

While this may be surprising, it simply reflects the overwhelming complexity of the issue. It is undoubtedly difficult and so the debate is often limited to providing homes for those who need significant care.

We often overlook the majority of the population whose changing wants, in terms of lifestyle and service, and changing needs, in terms of the home, place and cost, remain unique and individual as we grow older.

This has led to a fragmented debate among housing and development practitioners about what form of accommodation, built environment, tenure options and services would help achieve a happy third age for the many. There is plenty of good thinking and good practice, but there's currently no clear path to translating these into provision at the scale and pace required.

A key objective for our Working Group therefore was to embed the need for housing for older people into the thoughts and plans for all providers of housing development and management. Proposed planning reforms and reactions to the pandemic have re-emphasised the importance of quality, placemaking and open spaces which should apply equally to housing for older people.

We want to see the issue strongly reflected in everything from planning policy to everyday discussions with planners on how to create strong, sustainable places to live.

Stepping up supply will not only drive choice within the market place, it will give us the space to rethink how we use existing homes more appropriately.

This is not easy. There are pressures on resources, other competing housing and societal priorities, and meeting the needs of the most vulnerable will inevitably dominate our thinking.

The first step is take stock of our business plans, spacial plans, development master plans and related strategies. They must seek to tackle both the impending care and support needs of the future vulnerable, as well as reflecting the needs and desires of the wider group of ageing customers.

To help guide the way, the group have tried to create a 'way in' for a variety of providers. This guide captures best practice which could be used to create new strategies, to test concepts and to ensure the customer remains at the heart of provision throughout their lives. It also enables the integration of practices to deal with infection control and self isolation which have been adopted during the 2020 pandemic.

I recommend this guide to older persons' specialists but even more so to placemakers - those who are thinking of creating new mixed-income, multi-generational, mixed-tenure places, places which themselves develop and mature over time.





How to use this guide

At the heart of this document is a matrix (pages 6-7) that provides a series of prompts to help housing associations, councils or private companies understand at a glance the complex series of interlinked decisions that need to be made in the early stages of involvement.

Alongside this is a narrative that gives more context and explanation, some of the pitfalls to avoid and where to get more detailed information. It is intended to offer a sense of the complexities involved and the need to think holistically and innovatively; the need, for example, to think about not only how the project can be financed and built, but what will the service charges be and can pensioners afford them? Who will provide care? And how might the partnership work with local GPs?

It is likely that many of the considerations set out in the matrix will need to be thought about in parallel with each other. And the starting point is also likely to be determined from the circumstances of the developer or commissioner and the questions they are trying to answer.

For example, a housing association looking to develop suitable accommodation for the over 65s and free up under-occupied family homes is at different starting position to, say, a local authority working out how to repurpose an existing block of sheltered housing built in the 1970s which is no longer fit for purpose.

A good starting point might be to ask this question: What do you want to achieve and why?

Those using our prompts might also want to consider the people, homes and money sections in parallel – but the matrix is intended to be flexible and an aid to development. Asking the right questions and pinpointing the target residents will save time and money further down the line, de-risk the scheme and ensure residents feel settled and happy.

Matrix

A series of prompts to help housing associations, councils or private companies understand at a glance the complex series of interlinked decisions that need to be made in the early stages of involvement.



PEOPLE:

What are the needs and aspirations of those in the area?

For more information see pages 8-11



HOMES:

Making the most of existing stock

For more information see pages 12-15

Demography

- Do you understand the age profile and, protected characteristics, income and tenure of people in your area of interest?

Health and well-being

- Have you considered the social, physical and mental well-being characteristic?
- People working longer?

Tenure

- Do you understand the tenure profile?
- Do you understand the financial position, considering equity, pension and financial stability?

Predicted future demand

- What is it likely to look like?
- Is this prediction based on knowledge of what is being done?
- Does it take account of household type - singles, couples, multi-generational?
- Has your analysis taken account of local/regional variations?
- Do you understand housing preferences and how people want to live?
- Income/asset position of individuals

Existing assets

- Where are your current assets?
- How much do you have?
- Who lives there?
- How much is suitable for older people?
- How many over 65s live in family housing?
- Competition?

Location

- Is the location urban, suburban, or rural?
- How suitable is it?
- Is it where people want to live?
- Is it in a masterplan or planning zone?
- Is it a regeneration area?

Asset management strategy

- Is the asset management strategy driving the wrong decisions - providing solutions that customers do not want?
- What is the gap between supply and demand?
- Fire safety; H & S
- Adaptations
- Remodel or refurbish?

Proposed solutions

- What are your aspirations?
- What are the predicted future housing solutions, tenures, affordability levels and options?
- Are the solutions practical for the customer - low income, no transport so need to be close to amenities?
- What is the typology?
- What is the operational model and service provision that will go in?



MONEY:

Is the scheme viable?

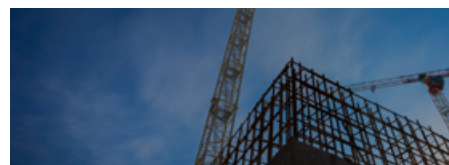
For more information see pages 16-17



DESIGN:

Getting the brief right

For more information see pages 18-21



DELIVERY:

Turning concept into reality

For more information see page 22

Land and site

- Do you already own the land?
- Do you have to buy/acquire the land?
- What does it cost?
- Are you putting the land to better use?
- How does the land cost impact on both capital and revenue streams?

Planning class

- Have you considered whether the scheme will be C3 or C2?

Capital investment

- What is the business model?
- What can you afford?
- Where do you plan to get funds?
- Do you expect to get profit from the land and building investment?

Revenue

- Do you need profit at sale?
- Or internal rate of return?
- Do you need event fees?
- What is your model?

Financial

Is it viable? If it's not financially viable, re-examine PEOPLE & HOMES



Conceptual drivers

How have you considered the 5 "P"s?

- People profile?
- Place?
- Planning?
- Price?
- Product?
- Sustainability and well-being considerations
- Ease of maintenance

Site and design

How have you considered the following?

- Community?
- Constraints?
- Context?
- Infrastructure?

Community

- Are you designing for general or specific needs?
- Will facilities be provided for the community?
- How will the scheme integrate with the wider community?
- How will stakeholders be involved?
- How will it complement existing stock/provision?

Proposal

To be drawn from People / Homes / Money

- Is the proposal financially viable?
- Does the proposal meet the brief?
- Does the proposal meet community objectives?
- Does the proposal meet anticipated future needs and demands?

Partnerships

- Have you considered the views of stakeholders?
- How does your project relate to local council service delivery or health needs?
- Does your proposal offer any additional benefits?

Procurement and construction

- Why have you selected your procurement route?
- What construction method (OSM or other) have you considered and why?
- Building Safety Regulations?

Management

(also considered under DESIGN)

- Have you considered housing management implications?
 - Operational implications?
 - Service provision implications?
 - Maintenance implications?
- Direct delivery or commissioned service?

Review

- How do you plan to evaluate post occupancy?
- Have well-being benefits been realised?
- Other benefits?
- Future proofing / longevity?

PEOPLE:

What are the needs and aspirations of those in the area



Understanding the demographics

The better the information gleaned about potential residents, the less risk of under occupation and the more chance of success. So first things first. Anyone developing or commissioning specialist accommodation must know who their potential customers are and what are their needs. That means understanding as much as possible about the current and potential future requirements of those living in the area and what other choices are available. That's not always easy.

Finding out more about the population requires investigating local demographics and the general physical needs and state of health.

For example:

- Is there an area or location where more older people are living?
- Do they have appropriate accommodation at the moment?
- What sort of stock do we need to be building?
- What is the financial position of the people we wish to house?

Then there's the question of tenure. If the area is made up of a large number of owner occupiers, it might make sense to ensure that any new development for older people has a high proportion of homes for outright sale.

The age profile of the population can be drawn from census data. Projections of population and households by age group can also be used. Local mortality rates are an important consideration, too, in terms of people's expectations for later life.

There are some online tool kits which can help.

One of these has been developed by Housing LIN. Called SHOP@ (Strategic Housing for Older People Analysis Tool), it can be used for forecasting the housing and care needs of older people.

The consultancy firm CACI also holds large amounts of data.

That said, data can be limited. Most local authorities use housing needs surveys, strategic housing land availability assessments and local plans which merely extrapolate census data and local authority and housing association waiting lists and data from registers. The resulting figures can be unreliable as the registers are very blunt instruments.

Also, waiting lists and registers once held thousands of elderly people who joined the register for insurance purposes but were unlikely to ever move, unless a preferred property became vacant. However, recent changes to policy has meant the registers now only hold active applicants who are bidding regularly for vacancies as and when they occur. Neither are accurate ways of knowing about emerging demand or a need for a different type of product.

Data insights will help set the scope of what type of homes will work best, the type of facilities necessary to provide a community and what sort of subsidy may be required to make the development stack up financially.

Conducting a survey of residents may also be a worthwhile option for existing landlords, particularly to collect information on health and well-being. The closer landlords are to their residents, the easier to obtain richer data.



More information

SHOP@

www.housinglin.org.uk/Topics/browse/HousingExtraCare/ExtraCareStrategy/SHOP/SHOPAT/

GOV.UK

www.gov.uk/guidance/housing-for-older-and-disabled-people

CACI

www.caci.co.uk/

Housing our ageing population, Local Government Association, 2017

www.local.gov.uk/housing-our-ageing-population

TALKING POINTS:

Inequalities and housing options for people in later life

The Centre for Ageing Better is an independent charitable foundation that focuses on low income home owners and those in the private rented market around the ages of 50-70 that may be at risk of missing out on a good later life.

Recent research it commissioned highlighted wide variations in how people are experiencing later life: some are living well, but there are disparities that reflect social and economic inequalities across the country.

Although we are living longer, housing is not keeping up with that change. There is much focus on new affordable homes but not on the age group that is growing faster than any other age group in our population.

The majority of people over the age of 65 are still owner occupiers, but there has been a rapid increase in private renters, and there are many currently in their 30s and 40s that will reach retirement without ever owning a home. These are usually in non-secure tenures with the most expensive rent in the market.

Research has shown the main reason cited for not moving in later life is a lack of affordable, suitable, attractive housing options in areas people want to live.

This feeling is especially significant in the lower middle income groups. A significant group became owner occupiers in the 80s and 90s through right-to-buy, and are moving into later life trapped in homes in poor condition or disrepair.

Some corners of the housing market assume younger customers would not buy an accessible home because of design features that have clinical or institutional connotations. But research commissioned with YouGov found there is a commercial market for accessible homes for all ages.

The Centre for Ageing Better is now broadening its focus to take in all 'non-decent' housing. The goal is to develop safe and accessible homes throughout the UK. To achieve this goal, they will be looking to work with government, developers, housing associations, local authorities and the housing supply chain to achieve this.

There are big issues to be tackled. For example, what meaningful adaptations in 'lifetime homes' are affordable. Also, category classes need revising: the Centre is pushing for all homes to be category 2 minimum.

Crucially, lifetime homes and lifetime neighbourhoods need to demonstrate they represent long-term holistic value. But this information is hard to obtain as most local authorities do not have the resources to record how many new homes are built this way.

Understanding the different housing types

There is a significant amount of variability in the types of specialist housing for older people. Any single development may contain a range of different types of specialist housing – and of different tenures. There may be social rent, affordable rent, shared ownership, private rented or outright sale.

While many of those moving into specialist accommodation tend to be older, 55 tends to be the minimum age set for schemes (based on local authority convention at a time when people were retiring earlier). Some social landlords are now raising their age restriction to 65 to reflect the fact that people are working longer, and their needs will be different.

The different types of specialist housing* designed to meet the diverse needs of this demographic can include:

Age-restricted general market housing

This is generally for people aged 55 and over and the active elderly. It may include some shared amenities such as communal gardens, but does not include support or care services.

Retirement living or sheltered housing

This usually consists of purpose-built flats or bungalows with some communal facilities such as a lounge, laundry room and guest room. Typically, there are no care services, but there's often some support to enable residents to live independently.

This can include 24-hour on-site assistance (alarmed) and a warden or house manager. Generally, 'sheltered housing' has become less attractive as a proposition because there is no centrally funded support to cover wardens on site and advances in technology have made this unnecessary. Some landlords have recast their schemes as 'well-being' schemes, following the withdrawal of the Supporting People funding and the switch to personal budgets. Here, the on-site staff facilitate activities and they may split their time across different schemes.

Extra care housing or housing with care

This usually consists of purpose-built or adapted flats or bungalows with a medium to high level of care available if required, provided through an onsite care agency registered with the Care Quality Commission (CQC). Residents are able to live independently with 24-hour access to support services and staff, and meals are available. There are often extensive communal areas, such as space to socialise or a well-being centre. In some cases, these developments are known as retirement communities or villages - the intention is for residents to benefit from varying levels of care as time progresses.

Residential care homes and nursing homes

These have individual rooms within a residential building and provide a high level of care meeting all activities of daily living. They do not usually include support services for independent living. This type of housing can also include dementia care homes.

Multi-generational housing

Multi-generational housing in the UK currently tends to cater for different generations of the same family. As a result, the homes are typically single-unit dwellings, on average containing three people with three bedrooms. According to CBRE this type of housing is on the increase, driven by the cost and inability of millennials to get on the housing ladder.

Four key trends in the older persons housing market

- **Lifetime Homes:** Making traditional new homes fully adaptable and accessible.
- **Intergenerational developments:** For example, accommodation for older people in the same development - say, mature students, who may be given discounts in return for support to older residents (perhaps, doing shopping).
- **Mixed-use schemes:** Retail units are developed alongside housing for older people, and general needs housing.
- **High street developments:** Town centre schemes that provide accessible locations for older people and serve to repurpose and regenerate high streets (see Case study 4, Rightsizing to the high street). One emerging idea is older persons housing for private rent, capturing a cohort of active pensioners keen to take advantage of what's on offer in cities and towns, while perhaps renting out their family home.

More information...

For more resources on the typologies featured on this page, see the Housing LIN's webpage: <https://www.housinglin.org.uk/Topics/browse/Housing/HousingforOlderPeople/>

* The different types of specialist housing have been adapted from: www.gov.uk/guidance/housing-for-older-and-disabled-people

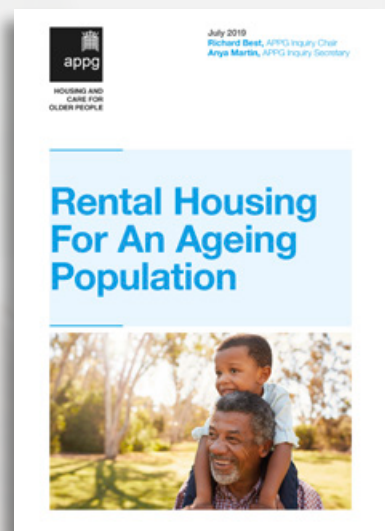


TALKING POINTS: Rental housing for an ageing population

Over recent years the All-Party Parliamentary Group (APPG) on Housing and Care for Older People has looked at the housing needs and opportunities for older people, producing a series of inquiry reports on Housing for an Ageing Population, known as HAPPI. The design principles laid down in the first guide published in 2009 and its subsequent updates have become enshrined as best practice in the sector.

The latest HAPPI report published in July 2019 turns its attention to affordability in the private rented sector – one of the greatest challenges being faced by society as it will necessitate the need to provide subsidised housing in far greater numbers to accommodate those currently and projected to live in the private rented sector.

It points out that the forecasts of households in the private rented sector (PRS) headed by someone aged over 64 will more than treble over the next 25-30 years (from around 450,000 today to over 1,500,000 in 2046). It says that if rents grow in line with earnings, around half of these older households in the PRS will no longer be able to afford the rent they could manage before they retired, and it acknowledges the substantial regional differences in affordability.



It concluded that “something in the region of 630,000 PRS households aged 65 and over will need lower-cost rented accommodation in less than 30 years. This means building an average of about 21,000 suitable homes per annum.”

To head off the severe problem caused by a mismatch in the PRS between retirement incomes and rent levels, the group recommended that the government’s National Strategy for meeting the need for affordable retirement accommodation recognises the need for a shift from renting in the PRS to renting in the subsidised/social housing sector.

HOMES:

Making the most of existing stock

Matching homes to people

The issues facing housing providers mirror the experience of many high street chains, in that like these big retailers, numerous local authorities and housing associations have not adapted their offer to changing patterns of demand.

Demand needs to be seen as a matrix, seeing the texture of local provision and responding to forecasts.

To repeat, it's crucial to have insight into an area's residents in order to assess the likelihood and type of housing required.

Another essential piece of the jigsaw for landlords is the existing stock.

Government says that between 2014 to 2017, around 8.3 million (36%) of the estimated 23 million households in England were under-occupied - that is, they had at least two bedrooms more than they needed. Freeing up these family homes by providing attractive housing for their under-occupying residents can help alleviate hardship for young families whose homes are now too small for their needs.

This experience illustrates that there needs to be a better offer and a 'pull', rather than a 'push', to downsize/transfer. The better use of transfers (incentivised if needs be) must be considered fully. Even helping the elderly with the move can make changing homes more attractive. Many older people are put off from moving because of the logistics and have no one to help them. Cross Keys Homes has been working with Peterborough City Council to support tenants who are living in homes that are too big for them to downsize. With a grant from the council, the housing association is offering incentives of up to £5,000 to assist with the move.

Good practice guidance around dedicated moving staff, explanation of home loss payments and experience of involving families is widely available. Most importantly, however, the product must be attractive.

Experience of our members as to what is the right offer varies. Some have found one-bedroom properties to be more attractive because of their affordability, particularly for people with a small pension who may not be eligible for the benefits of those purely receiving state pensions.

Another issue is that so much accommodation for older people is no longer fit for purpose and needs urgent upgrades as we say earlier.

On paper, around 10-15% of all housing association and local authority stock is currently designated for older people.

However, this does not recognise that the majority of it was built in the late 1960s and early 1970s. The vast majority of these traditional category 2 sheltered schemes consist of bedsits and/or small one-bedroom flats with large communal areas built at low density. They are no longer popular and are becoming a drain on providers' resources, with high void costs and management issues. They can often be difficult to adapt, remodel or refurbish internally to suit older people.

However, the big question is whether to upgrade or start again. Could this particular accommodation be refurbished to suit more general needs? Or could adding additional accommodation to the site help provide cash to upgrade to the standard required? In making these judgements it is worth considering:

- What is the gap between supply and demand?
- How suitable is the location, ie, is the accommodation in a place people want to live?
- What extra accommodation could be leveraged from the site?
- What general needs accommodation might be better reconfigured to suit the needs of older people?
- Is it worth investing in adaptations for existing general needs housing so that older people can continue to stay in their homes? Or is this just a sticking plaster on the problem?



More information...

Rural Housing for an Ageing Population: Preserving Independence, The Rural HAPPI Inquiry, Jeremy Porteus, April 2018.

www.housinglin.org.uk/_assets/Resources/Housing/Support_materials/Reports/HAPPI-4-Rural-Housing-for-an-Ageing-Population.pdf

To give further context, half of the UK's non-specialised housing stock is estimated to require structural alterations to provide suitable access for older people; and over a quarter of all inaccessible homes are not adaptable at all.

Today's older people are more likely to be active for longer in their lives, and are unlikely to be attracted to the sort of sheltered housing schemes built in the 1970s. The bulk of these were blocks of small flats with tiny kitchens without the space for the modern conveniences we all take for granted.

The demand for rented accommodation for older people is changing. While some provision for communal schemes is still required, the new cohort of older people (born in the 1950s and 1960s) wishes to live independently within their community. The sector has to make hard and quick decisions to rid itself of a proportion of its stock and replace it with new, fit for purpose homes over the next 10-20 years.

Providers need to include in their risk and asset management strategy a plan for incremental disposal/re-design/demolition of poorly performing schemes. Financial modelling of the temporary loss of rental income in the business plan will have to be made clear to lenders, Homes England and MHCLG.

Proposed solutions

As our case studies show, a number of providers are bringing innovative solutions to bear through a range of housing types, from extra care to independent retirement living schemes (pages 23-37).

Repurposing stock

Conversion of urban high-rise blocks, which do not meet the needs of families, can work well for extra care or retirement housing, especially if the accommodation is near transport hubs or cultural activities.

In some cities, local authorities are converting multi-storey blocks to this purpose and then building general needs housing on surrounding land, to form the basis of regeneration of the area. Northwards Homes, for example, has converted a high-rise block into a very successful extra care scheme in Manchester (Case study 5). Elsewhere, the housing provider whg is looking to infill homes for older people within traditional estates to create choice within the community (Case study 12), while Sutton Housing Society is developing roof top space (Case study 3).

A word about income

Understanding income levels and what potential buyers and renters will be able to afford is a crucial part of the homework. Doing the sums will determine whether one-bedroom or two-bedroom accommodation would be the best size. While some of the Group point to the need to build two-bedroom flats, others say that one-bedroom accommodation is more popular, particularly for residents who have small private pensions and would not be eligible for benefits towards the extra cost of a two-bedroom place.

Arguably, a campus-style development with higher service charges (see below) would not always work for those on lower incomes, unless the scale of the development was such that services charges are kept down.

Urban versus campus

A trend in recent years has been to develop more rural campus-style developments, with their own facilities such as cafes, and gyms and transport made available to the nearest town. To make these type of developments commercially viable requires scale. Developments of between 200 and 350 units are not unusual. At one scheme in Huntingdon, Engie is developing 500 units and of these, half will be for over 55s (Case study 10).

Developing older people's housing schemes of 250-plus units would certainly require the population of a decent-sized town to draw on to make it feasible. At the other end of the scale, urban developments near transport links and with local amenities mean the local town could be smaller.

There is no hard and fast rule on size. It was suggested that 55 units was a good number for fostering a community but there are many successful schemes where numbers are fewer than this. It's also about balancing the communal facilities needed in-house with what's available in the nearby community.

Smaller urban units can prove very successful, particularly for outright sale, where they might suit active older people looking to downsize and still enjoying local cultural activities. But to meet the demands of downsizers, as well as choosing the right location, it's essential to create kerb appeal, with good quality design and landscaping.

Catering for rural communities

What mustn't be forgotten is that small scale provision in villages would often be the preferred solution for those who currently live in rural locations and who otherwise might simply refuse to take the step of moving from unsuitable properties.

As the rural HAPPI Inquiry in 2018, *Rural Housing for an Ageing Population: Preserving Independence*, concluded, "**there are some real advantages in meeting local requirements within village settings: these can enable continued support from family and friends, and we were greatly impressed by the strength of voluntary and community activity – with consequent savings to the State – in rural areas.**"

The report recommended the development of relatively high-density bungalows that could preserve independence and reduce the need for care and support.

TALKING POINTS: What residents really want

The Hyde Group undertook a detailed analysis of their supported and older people's housing portfolio to find out who occupies the stock and their motivations for living there. The survey confirms perceived wisdom, but it also throws up some surprises that other providers might want to consider.

- Residents looked for properties in areas nearer to their family and with good transport links.
- Nine out of 10 of those who had not moved (and not considered it) would rather move to a bungalow. Flats were not preferable because of a perceived lack of space and noise. Some residents who had not moved were looking to upsize to accommodate extended family, usually grandchildren, permanently living with them.

- Mobility and illness were the biggest factor for choosing to move in to more suitable accommodation, with many residents not considering a move until they were met with a crisis.
- Residents were unaware where they would go to find information about retirement options.
- They were also reluctant to move because of the stress of organising everything alone, but were unaware that the housing association was able to provide handyman services.

Hyde plans to expand the research across other housing associations who are keen to take part.



Today's older people are more likely to be active for longer in their lives, and are unlikely to be attracted to the sort of sheltered housing schemes built in the 1970s.



MONEY AND LAND HOLDINGS:

Is the scheme viable?

The lie of the land

In any development, the price paid for land will determine whether or not a scheme stacks up financially. Those that already have land available have an advantage, provided it's in a location that will work. That's not just in terms of transport links but also aspects like gradients. A site with a gradient of above 1 in 20 would not be ideal for older citizens. Even if they are active when they move in, it may become too arduous with age.

It's also about being creative and working out, for instance, whether moving assets would unlock a large package of land needed to make a scheme viable.

For those buying land, there are other aspects to consider. Competing in an open market against traditional housebuilders can make the scheme unviable, in that less of the land in more specialist housing will be used for straightforward floor space for sale or rent. For example, areas need to be given over to communal spaces, which reduces the rate of return.

This may be less of an issue if the financial model is based on a 'revenue' model, where returns are made over a longer term and based on care provision, as opposed to capital investment. This is the traditional house builder model where investors make their returns by turning the land into sales and moving on. This is discussed in more detail below.

When the land is being assembled it is useful to know:

- Demographics
- Local amenities close by
- Topography of the site
- Public transport situation
- Other amenities nearby including medical and leisure and outdoor
- The mix of units envisaged, in terms of tenure and size
- Potential partnerships, ie JVs with housing associations and/ or local authority
- Outline budget and financial parameters.

Planning class

Planning obligations can turn out to be the Achilles heel of the business case for older people's housing. Class use determinations are central to a project's viability and it's essential to understand what class use the scheme would fall into.

As the planning consultant Lichfields pointed out in its April 2019 Insight report, *Solutions to an age-old problem*, there is no fixed or agreed planning definition of the different types of housing for older people. In England and Wales, the issue is whether a development sits within Use Class C3, (Residential) or C2 (Residential Institutions) and in Scotland within Class 8 or Class 9.

It's important because accommodation designated as C2 is not obliged to provide affordable housing as part of a Section 106 agreement; in the C3 Class it is.

For developers who have done their sums on the basis the scheme falls into C2 might find their business plan shot to bits.

The Lichfields report shows how planning inspectors have wrestled with the issue and that decisions can be unpredictable. For example, in one appeal for retirement apartments for over 55s, the inspector considered the use class to be C3 because they were wholly self-contained and noted that, while they were serviced, this is different from care.

In a separate case, the inspector considered that assisted living units were C2 because although they were self-contained, they were accessed via communal spaces and residents had access to communal facilities. Occupants had to be over 60 and receive a minimum of two hours care per week, albeit the definition of care was very broad. Lichfields points to many other such cases.

However, there is some room for optimism on the planning front, and it could provide a lever for developers to make the case for older people's housing to local authorities. A planning guidance document published in June 2019 by the Ministry for Housing Communities and Local Government said that local development plans need to provide for specialist housing for older people where a need exists. Innovative and diverse housing models will need to be considered where appropriate.



More information

Lichfields Insight Report April 2019

https://lichfields.uk/media/5104/solutions-to-an-age-old-problem_planning-for-an-ageing-population.pdf

www.gov.uk/guidance/housing-for-older-and-disabled-people

The document pointed out that many older people don't need specialist accommodation or care, and may wish to stay or move to general housing that is already suitable, such as bungalows or homes which can be adapted to meet a change in their needs. Plan-makers will therefore need to identify the role that general housing may play as part of their assessment. To do so, they will need to consider the size, location and quality of dwellings needed in the future for older people in order to allow them to live independently and safely in their own home for as long as possible, or to move to more suitable accommodation if they so wish.

Investment and return

Financial assessments are also critical to any scheme. Can you get the money to make it viable? Who will invest in it? Will loans be available at reasonable cost?

Before these questions can be answered, think about the business model the scheme will be based on: will it be a capital investment model or a revenue model?

In the capital investment model - where developers sell and move on - investors will expect to get a return on investment more quickly. In the revenue model, return comes from retaining the development as an asset, and then recouping the investment through operating revenue, or potentially an uplift when it is sold on. Investors will need to be more patient, but how long will they wait for their return?



Developers will need to think about where they might get the funds and the interest they pay. Cash flow is another consideration. Upfront capital will be flowing in one direction for some time. Buying land, paying fees to designers and covering build costs are some of the out-goings hoovering up cash while the scheme is delivered.

Negotiating ways to defer land payments or bringing joint venture partners on board are ways to limit the risks.

Developers should also explore what grants may be available.

Financial review - does it stack up?

As well as financing the construction, developers following a revenue model must consider a range of other costs and how they will be paid for, chiefly:

- Staff
- Management
- Maintenance.

Capital costs need to take into consideration staff and the extra facilities, which can make housing for older people unviable compared with building general housing on the same site.

Finally, as well as looking at the financial bottom line, it's worth looking at the provision of housing for older people holistically. This may apply to public rather than private sector developers, but what is the social value of the scheme? And how can it benefit the area?

DESIGN:

Getting the brief right

Matching the design to the location

Gone are the days of one size fits all. Like general needs housing, older people's housing comes in all types.

Getting the right design brief will only be possible if the developer or commissioner has pinpointed who it is for, what their needs are now, and potentially whether new homes will have to accommodate change in future; plus, as discussed earlier, the price points and type of tenure.

In short, the brief starts with the type of housing (eg, sheltered or extra care) and the facilities needed (ie, extra care, retirement village or urban).

Attention must also be paid to:

- Other facilities in the local area already.
- What new infrastructure will be needed to service the site, roads, water, electricity, and how straightforward will it be to deliver.
- The social infrastructure in the vicinity. The key is not to duplicate what's already there. If there's a community centre across the road, say, it might be unnecessary to include one in the scheme. Conversely, could a communal centre on site be cross-subsided by holding wider community activities there? Mixed-use schemes including retail and cafés can plug gaps in local amenities and drive regeneration.
- Size of dwellings: as highlighted earlier, getting the right mix of potentially one- and two-bedroom dwellings is vital for the financial sustainability of the scheme. A new idea in the South-east is to develop 'one bedroom plus schemes', providing an

extra room but in a more affordable way than a full two-bedroom flat. Architect Levitt Bernstein is designing this type of scheme.

Promoting well-being and sustainability

If you are happy with your home, you are more likely to be happy in life. According to research by the Happiness Institute, our homes are more important to our overall happiness than our income or jobs. Based on interviews of 13,000 people across Europe its *Good Home Report*, published in June 2019, said that the most important factors were not where people lived, the size of a home, or whether it was rented or owned. Instead, *"what matters most is having a home that gives you a feeling of safety, comfort, identity and pride."*

While this research was not specifically about housing for older people, its message is equally applicable. Given older people spend more time at home than those that work, accommodation that evokes these feelings and is adaptable is more important than ever. The sentiment has certainly been underlined over recent months. The shielding and lockdowns that has been wrought by the pandemic has meant that many older people will have spent more time at home than ever before. It has emphasised the importance of designing homes that are spacious and light filled and that provide an outside space to use, such as a balcony or courtyard. The pandemic more generally has also highlighted the need to design for other well-being aspects too.

In residential dwellings that necessitates measures that can help control infections, such as generous circulation spaces and staff facilities with showers that can be accessed via a separate entrance.

Applying the building regulation and voluntary standards like Lifetime Homes will ensure that new homes meet well-being and sustainability requirements, and offer flexibility to a certain degree.

But developers may want to exceed these standards to meet more exacting requirements of older persons' housing in terms of flexible space and infection control requirements, use of materials, indoor air quality and zero carbon credentials including energy in use and embodied energy of the materials used for construction.

It's worth noting that in a move to meet net zero-carbon emissions by 2050 government has pledged to bring an end to the installation of gas boilers in new build domestic properties from 2023, with an expectation that heating will be replaced by electric heating or heat pumps. With that date approaching, and climate change considerations more to the fore, going above and beyond current regulations could provide an attractive differentiator.

We discuss the findings of the Dwell Project, (right) which shows how better design of housing and neighbourhoods can improve older people's well-being.





Maximising the site and understanding the risks

Schemes can unravel financially before a single brick is laid for those that misjudge the site and what's going on below the surface. Designing to make the best use of the site in terms of layout and design is one major consideration and needs to be thought about when the design brief is being worked up.

Another is the land and the ground conditions, which can present risks once the diggers move in. Unexpected ground conditions like contamination or uncharted utility infrastructure can throw a project off-course once construction starts, and potentially increase costs.

Another easy to overlook risk is knowing precisely how much land is owned. It pays to know your boundaries.



More information

The GoodHome Report June 2019

www.kingfisher.com/content/dam/kingfisher/Corporate/Documents/Other/GoodHome%20Report_FINAL%20-%20June%202019%20-%20name%20change.pdf.downloadasset.pdf

www.gov.uk/guidance/housing-for-older-and-disabled-people

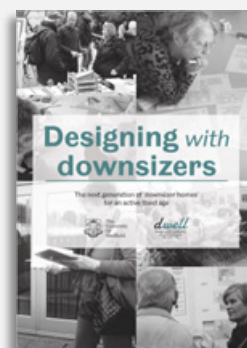
TALKING POINTS: The DWELL Project

How can better design of housing and neighbourhoods improve older people's well-being? That was the brief for a research project carried out by the University of Sheffield.

The DWELL (Designing for Well-being in Environments for Later Life) project, as it was called, looked at four intersecting areas, which all relate to each other as people look to live the 'good life' as they get older. These are: places and environment; material resources; social relations; and physical and mental health.

The project focused on Dore, a Peak District village near Sheffield. It's a place where developers are looking to develop land, but face resistance from locals because, with land values very high, density then gets very high and there is extra pressure on services.

The project considered that a good place for people to age in place is captured in the following essential criteria: accessible green spaces and well-maintained walkways; accessible goods, services, amenities (WCs particularly) and leisure facilities; accessible healthcare provision; accessible public transport; the opportunity to play a social role in the local community; a pedestrian and cycle-friendly public realm, which encourages people to walk, cycle and stay fit and healthy on non-polluted streets; and the opportunity to be involved in local decision making.



Designing with Downsizers

https://www.housinglin.org.uk/_assets/DWELL_DesigningWithDownsizers.pdf



Image © Assael

Planning and design

At the planning and design stage it's important to appreciate other constraints that can impact on layout and topology.

They include planning limitations like height and rights to light. Planning rules may also restrict materials to a specific palette, which is often the case in a conservation area.

Housing providers and housing teams within local authorities can and should have a role in the development of local plans. There is evidence that pre-application discussions with development management planners can improve the overall design of the scheme.

These days there's a trend towards designing for the 'younger' older person - someone who is more active and wants modern contemporary design.

Avoiding an institutional feel by omitting long corridors and incorporating lots of day light are the sort of principles laid down in HAPPI reports and others. The holy grail is to build in greater flexibility, so spaces can change as needs alter in the future. There is a great deal of guidance available.

As we said on the previous page, the pandemic has underscored the need for outside space, which has provided respite for those who have been homebound in the past few months. It can provide an important connection with nature.

Courtyards work well, forming an outside space that is sheltered and protected, and can foster a sense of community and

help counter the loneliness often felt by older people.

It makes for more efficient design if thought is given at this early concept stage to how a scheme can facilitate opportunities for socialising, rather than waiting to consider it at more detailed design stage. It will impact on the use of the site, and potentially costs.

Listening to care providers

Care providers will have their own needs in terms of the layout of the site and the way the facilities are organised. It might be that carers are assigned certain wings, for example, and require communal areas at specific intervals to lever efficiencies in the way they do their job. If the developer is intending to contract out care and support, it would be extremely useful to get input from the specialist partner.

Maintenance and management

As well as management considerations, design will have to give due regard to maintenance too. This is simple good practice. Choosing materials and building forms that can lower costs will help viability and ensure service charges are not set at unaffordable levels.

Keeping up with new technology

Technology and products are being developed that make it easier for older people to live in their own home. They can offer a degree of personalisation - for example, plasterboard that allows shelves, additional cupboards or items with sentimental value

to be fixed to walls simply, with just a screwdriver - removing the need for power tools or outside assistance. Is there someone responsible in your development team keeping abreast of this? Or at least pressing designers to research the area and be on top of new smart technology?

Rapid advances in technology need to be reviewed and reflected in specifications, including preparations for a digital switchover by 2025. Developers themselves have much to gain by being aware of how technology is bringing to the fore changes in care models and the greater flexibility that accompanies them. At the very least there should be insistence on full broadband provision to allow for interactive connection to assistive technology and to simply allow older people to use the internet for everyday communications. The use of technology accelerated during the pandemic and this needs to be reflected in older people's housing.

Reviewing the proposal

Once the parameters of the design concept have been drawn up, it's time to appraise the proposal and decide:

- Is it financially viable?
- Does it meet the brief (sizes of homes, layout of the site, facilities, specifications for well-being and sustainability and technology and efficiency of care facilitation, if appropriate)?
- Does it meet budgetary requirements?



More information

Later Living: Housing with Care - Urban Land Institute, 2019

<https://uk.uli.org/lateliving/>

Age friendly housing - RIBA, 2018

<https://www.architecture.com/riba-books/books/residential-and-domestic-buildings/age-friendly-housing/product/age-friendly-housing.html>

Five guides from HAPPI

<https://www.housinglin.org.uk/Topics/browse/Design-building/HAPPI/>

The National Design Guide, MHCLG, 2019

<https://www.housinglin.org.uk/Topics/type/National-Design-Guide/>

A Home for the Ages - Royal Institute of British Architects & Centre for Towns

<https://www.housinglin.org.uk/Topics/type/A-Home-for-the-Ages/>

Design-out infection and design-in health and companionship

<https://www.prp-co.uk/news/features/design-rethink-care-homes-pandemic.html>



DELIVERY:

Turning concept into reality

Partnerships

Choosing who to work with is even more important for over 55s housing than for general needs. As discussed in the finance section, developers and housing providers should consider joint ventures to help raise funding and spread risks.

But there will be other partnerships to consider as well. Housing associations may want to work closely with a local authority, which may in turn have nomination rights. If so, it may work in favour of the community as a whole if both organisations work closely together to ensure that maximum opportunity is taken of moving residents who are under-occupying three-bedroom family homes.

Other partners and stakeholders to consider include:

- The local community
- Health and social care delivery.

Providing care

If the scheme is to provide care, who will deliver it? Local authorities, for example, may have their own care arm and as a partner of a scheme may insist that they provide this support. Some housing associations may not want to enter into this kind of arrangement. They may have their own care and support arm, which they offer to residents, or they may prefer to offer residents choice in how they use personal care budgets.

It can't be emphasised enough that the reputation of new developments that include care will be based on the quality of care provision, rather than the quality of the accommodation. If the care is poor, places will be hard to fill.

Procurement and construction

How will the scheme be delivered and then operated? Will it be self-delivered with the developer also organising the building work and then managing the scheme afterwards? Perhaps the developer is building to sell on? Or will a developer be a commissioning client, contracting out to builder under some form of construction contract?

Careful consideration of the procurement and construction options at an early stage will help ensure developers and landlords deliver schemes efficiently.

For example, it's essential to consider in conjunction with an adviser whether modern methods of construction will be appropriate. They can enable homes to be built more quickly but won't necessarily suit every site, particularly where fully formed pods are completed in the factory and stacked together on site. Going down this route often means making early design decisions, so that units can be pre-fabricated, and this can be a problem if the scheme needs to be changed for any reason.

It's essential too to get good advice when the building work is put out to tender. Competence, quality and social value should be given prominence in the selection of bidders. Procuring on lowest price can often lead to problems later. Again, there is plenty of excellent guidance to help ensure the resulting procurement process is successful, in terms of selection of both the bidders and the appropriate form of contract.

Review

What are the benefits of the scheme and how will it be evaluated post occupancy? Now is a good time to evaluate the benefits the proposal will deliver.

Other benefits to think about include:

- Freed-up under-occupied housing
- Reduced health service dependency
- Increased care worker satisfaction and retention
- Increased town centre footfall
- A popular community hub.

CASE STUDIES: Diverse solutions, inspired thinking

In the second part of our guide we showcase a range of solutions and innovative thinking from across the country to inspire organisations looking to provide a better offer for housing older people.

Our 16 case studies provide ideas across the spectrum and food for thought for meeting the many different circumstances and challenges faced by providers as they look to finance new builds or repurpose or refurbish existing stock. For example, we shine a spotlight on a pioneering scheme for women's co-housing in London, look at how a well-being scheme is helping to regenerate an area of the West Midlands, and highlight how an integrated hub in Manchester is providing a model for age-friendly development of the future.

CASE STUDY 1

Assael

 Essential Living

A blueprint for later living

UNION WHARF, GREENWICH



The London-based architect Assael believes lessons for later living design can be drawn from best practice in build to rent homes.

Union Wharf in Greenwich, south London is a ground breaking scheme by the developer Essential Living purpose-designed for the private rented sector. Delivering 249 build to rent homes, an array of residents' shared amenities and an extensive public realm, Union Wharf provides a blueprint for innovation and community living for the later living sector.

The project has established many precedents in the build to rent sector: it includes the UK's first private rented building specifically designed for families; it is one of the first high-rise residential communities in the UK to use volumetric off-site construction; and it pioneered the concept of discount market rent (DMR) as the affordable contribution. The DMR homes are pepper-potted across the two buildings to create an entirely tenure-blind community.

Retirees are the second most numerous age cohort after millennials in this community, and they usually thrive within the intergenerational setting, enjoying the opportunity for companionship, sharing experiences and knowledge and participating in and organising social events.

The ten-storey 'family' building comprises two- and three-bedroom dual aspect apartments with the living room always on a corner. An amenity focused rooftop level provides children's play space, grow-your-own allotment gardens, a lounge and a games room, a 'workshop' for messy projects and a space that can be hired for socials and children's parties, all designed to meet the specific needs of families.

Union Wharf exemplifies how build to rent design principles can be broadened beyond millennials to meet the needs of a diverse range of residents, whether families with young children, 'empty nest' downsizers or the older, retired generations. The shift in emphasis to shared spaces and experiences directly addresses loneliness, a major problem that disproportionately affects older people.

CASE STUDY 2



Purpose-built offers greater long-term benefits

KINGFISHER COURT, PETERBOROUGH



The Peterborough based housing association Cross Key Homes has found it's better to build new specialist housing for older people than adapt existing stock.

Cross Key Homes, which has over 1,000 properties for later living, recently altered its strategy when it experienced difficulties letting some of its properties to the older age groups.

It decided that it would be more effective to provide new specialist housing that was better suited to older or disabled people rather than reconfigure its existing stock.

All new developments were to be built to life time home standards to make it easier for people to adapt their homes as they grew older. And it raised its qualification age from over-55 to over-65 to reflect the fact people are living longer.

Cross Key Homes then formed a partnership with the local authority Peterborough City Council (PCC) to offer a £5,000 incentive for people to move to a new property that better met their requirements. As well as the financial assistance, the housing association also helps residents move and dispose of no-longer needed bulky items.

As part of its subsequent stock rationalisation, Cross Key Homes recently developed Kingfisher Court, an extra care development in Peterborough in partnership with PCC, which had nomination rights.

Kingfisher Court was on the site of a sheltered accommodation unit. Its residents were moved to new accommodation while it was being redeveloped and offered the choice to move in once the project was completed.

The new building comprises 79 one- and two-bedroomed apartments, which are designed to make life as easy and enjoyable as possible with their own front door, kitchen, bathroom and spacious living area. There is an on-site restaurant, a communal lounge, a hairdressing salon and landscaped gardens.

Each resident is assessed and receives a support plan tailored precisely to their needs. A dedicated care team is on site 24 hours a day to respond to planned care needs and emergencies. Each home has a LifeLine personal alarm.

By providing this level of services in purpose-built accommodation, people can remain in their own homes, with the support they need to live the lives they want, for as long as they want.

CASE STUDY 3

**Sutton
Housing
Society**

Rooftop apartments on existing blocks unlock estate's potential

UNLOCK THE POTENTIAL IN UNTOUCHED ROOFTOP LOCATIONS



Sutton Housing Society has ambitious plans for increasing the size of its estate by building upwards.

Keen to update the 1950s and 1960s apartment blocks in its housing stock, Sutton Housing Society decided the best way to position itself for the next 30 years was by building roof top apartments on top of existing structures. In October 2019 it therefore submitted five planning applications to the London Borough of Sutton for 79 additional one-bedroomed self-contained flats - a growth of 16% in its existing estate. Funding will be provided by the ethical lender, Charity Bank. The new developments are intended to unlock the potential in untouched rooftop locations and provide new affordable housing for people over 55.

As well as optimising the density of its estate, the association will improve and modernise the quality of its 50-year-old accommodation - this typically means an average site density

increase of around half for each location and on one site, an impressive 68%.

Where there are plans to add more than one floor, external envelopes to buildings will be added, allowing it to improve the façade but also 'lift' the scheme by improving the fabric of the building and its overall appearance. Additionally, communal lounges are either being extended or built anew to encourage social contact. The larger social lounges as well as supporting the density increase also enable additional floors to be built over. Wherever possible, the designs have adopted the 10 HAPPI (Housing our Ageing Population Panel for Innovation) principles.

By grouping five sites together, Sutton Housing hopes to gain a higher profile and influence than if it was developing just one site at a time.

It also offers economies of scale to have a seamless development pipeline with projects running side by side and learning lessons from each other. Informal and formal consultations can take place concurrently, and there can be

a collective approach to the pre-planning application meetings enabling them to agree principles across all sites.

The association believes its bold move signals to existing residents that it 'believes in our scheme', with planned reinvestment in their homes in tandem with development plans. Disruption for existing tenants while work is being carried out around them is to be kept to a minimum.

Cost plans were developed in tandem with the project and commissioned when it gained more planning certainty. The minimum GLA (Greater London Authority) grant, together with indicative assumptions around cost, have given it confidence that the plans are viable.

As housing market conditions fluctuate, the association can accelerate and/or slow down its programme accordingly. Rents will be at social levels, opening the door to pensioners who might not be eligible for housing benefit. Impressively, this was all delivered without an in-house development staff or development consultants.

CASE STUDY 4

Assael

Rightsizing to the high street

A RADICAL SOLUTION TO ELDERLY HOUSING NEEDS



A housing solution responding to major social trends by creating aspirational mid-market later living communities on every high street in the UK.

The architect Assael has been researching how to position later living developments in Britain's increasingly hollowed-out high streets. With over 5,000 empty shops in the UK, which could rise to 100,000 within a decade if current trends continue, according to The Grimsey Review, Assael sees much potential for a radical solution to elderly housing needs.

It acknowledges that not every empty shop will be suitable for conversion or redevelopment into later living accommodation. But pointing to the government's measures aimed at helping transform failing high streets across the country, and noting that a number of major retail landlords such as Intu and Hammerson are already actively exploring incorporating homes into shopping centres, it believes there is potential for later living to be part of the mix too.

Assael is designing these homes for over 55s who are seeking a serviced lifestyle experience. The product is flexible and designed to be attractive to the 'younger old' who are mobile and healthy and do not have care needs. This section of society currently has limited options to move out of family homes to somewhere that suits their advancing years without moving into something branded a 'retirement village', something many would resist. The idea of this later living initiative is that homes could adapt as people age, accommodating care

needs if and when they arise without having a general look and feel of a care home. It's designing homes for the mid-market, so it is intended to be accessibly priced to those on average earnings.

The development aims to promote wellness and independent living through thoughtful design and an ongoing programme of social activities much of which could be resident-led. The ambition is to keep residents healthy, happy and confident for as long as possible and as such reduce the burden on healthcare services. Given, however, that needs can change with age, 'light touch' on-site care provision would be provided. It's envisaged that care is provided as part of the service charge, rent or as a standalone charge and could be subsidised by local authorities.

Assael acknowledges that government would need to introduce a raft of new policy measures, including a new planning use class for later living, new permitted development laws, and business rates and stamp duty exemptions.

CASE STUDY 5



Manchester's enlightened approach to life's changes

WHITEBECK COURT, NORTH MANCHESTER



A converted tower block offers independent and assisted living just a few miles from Manchester city centre.

Whitebeck Court is a housing scheme in a converted tower block in north Manchester offering independent living for people over 60, with care and support on offer if required. The tower block was converted eight years ago.

Operated by Northwards Housing, a not-for-profit ALMO (arms' length management organisation) that manages over 13,000 Manchester City Council homes, it's very popular with residents.

Situated at the heart of an attractive residential area with good local amenities, there are shops nearby, as well as a post office, health centre and library.

Whitebeck Court has 91 one- and two-bedroom apartments, all fully refurbished to a high standard. Each apartment has a wide range of facilities including a spacious, high specification kitchen with electric hob, oven and hood, and space for a washing machine or dish washer and fridge-freezer. Additionally, each has a level access bathroom with walk-in shower (wet room), underfloor heating, energy efficient double glazing, a concierge for secure door entry access and a warden call system. There's a secure entry system and CCTV. Landscaped gardens surround the scheme.

Amenities also feature a bistro on ground floor operated by a local catering firm, a residents' Sky Lounge on the roof, a laundrette, scooter store, secure residents' parking, on-site care team office and a guest flat.

The rent is affordable, with a full repair and maintenance service included. New residents are given an introductory tenancy which automatically becomes a secure tenancy after 12 months as long as there have been no breaches of the tenancy agreement.

All tenants moving into Whitebeck Court from their current council home will be secure tenants already (as long as they have held a tenancy for at least 12 months). The apartments are not subject to the right to buy.

If residents need help with personal care, the on-site team provides support between 6pm and 10am. And if their needs change, extra care housing is designed to cater for a range of requirements without people having to move home.

Some residents may move into Whitebeck Court needing very little care or no care at all, but Northwards Housing's aim is to make everyone realise "that if their circumstances change, their home doesn't have to".

CASE STUDY 6

PRP

A community hub with extra care homes at its heart

LIMELIGHT, OLD TRAFFORD, MANCHESTER



Photography © Andy Marshall

An award-winning community health and well-being hub with 81 extra care homes located in the heart of Old Trafford, Manchester.

Designed by PRP, Limelight is one of the first integrated hubs to be delivered in the UK, and is a model for future age friendly developments, which places older people at the heart of their diverse community. The development sits at the heart of the Old Trafford master plan, a strategic development within Trafford Housing Trust's vision to regenerate the area.

Limelight successfully integrates 81 extra care apartments into a development which also incorporates dedicated space for the relocation of two GP surgeries alongside other associated health facilities, space for the delivery of council services, whilst also providing a range of intergenerational facilities for the wider community. These facilities include a library, social enterprise, community café, flexible event spaces, a 40 place children's nursery, sports and recreation facilities alongside the re-provision of St Brides church and rectory. Collectively they form an integrated hub designed with, and now serving the diverse communities across Old Trafford.

A number of external spaces have also been created; the first is a new civic space defined by Limelight and St Bride's Church. This area will serve as a piazza during the summer with the café and church breaking out onto this space.

A linear landscape provides a strong green edge to Shrewsbury Street, incorporating a children's play area, alongside gardens and a community orchard. Private amenity space for residents has been provided within a landscaped courtyard located at the very heart of the development.

The design concept is based around two new streets. A 'community street' promotes the health and well-being of local people, while a 'residential street' dovetails the development into the surrounding urban area. The tenure mix provided 61 affordable homes alongside 20 homes for shared-ownership. 61 are two bed properties reflecting the recommendations set out within the HAPP! report for a dwelling to have minimum of three habitable rooms.

An integrated hub, which delivered not only a very 'lean' extra-care development but a vibrant, multi-generational hub at the very heart of the community.

CASE STUDY 7



Levitt Bernstein

High-quality extra care homes with excellent communal spaces

HAZELHURST COURT, LEWISHAM. LONDON



Mindful that older people spend more time inside, the architects have centred their design on the concept of bringing the outside in.

In 2014, Phoenix Community Housing (PCH) identified Hazelhurst Court as an opportunity to provide new homes for their extra care older residents on an underused site, and in turn, free up larger homes for local families. As its first new build development, PCH was keen for it to set a high standard for others in the pipeline.

It asked the architects Levitt Bernstein to integrate 60 new homes and facilities on a constrained site, adjacent to a 1960s PCH flat block. As well as maximising the provision of new homes, it wanted to create communal spaces that could be enjoyed by all residents - regardless of where they live in the development, or their physical and mental health.

As a resident-led organisation, PCH engaged extensively with existing and new residents, in addition to its own stakeholders and members, as proposals developed. Being closely involved in this process, many of the discussions at consultation events informed elements of the project's design.

Being mindful that older people spend more time inside, the design is centred on the concept of bringing the outside in. All homes are dual aspect to provide a visual connection to the courtyards and neighbouring streets, so that even if residents aren't able to go outside much, they benefit from seeing activity in these spaces. Planters located on access decks in front of kitchen windows add to the sense of greening, while offering the opportunity for home growing and personalisation.

Similarly, a new garden room provides a generous, light-filled communal space between the two courtyards. The development also includes a range of communal spaces including a café, courtyard and lounge.

Residents benefit from 24-hour care and support from PCH's care partner, Notting Hill Pathways, which delivers tailored care packages to those residents with an identified care need.

Many of the first residents to move into the scheme were previously under-occupying large family homes locally. Their move to new, more appropriate accommodation has already enabled a series of chain lettings, freeing up homes for dozens of Lewisham families.

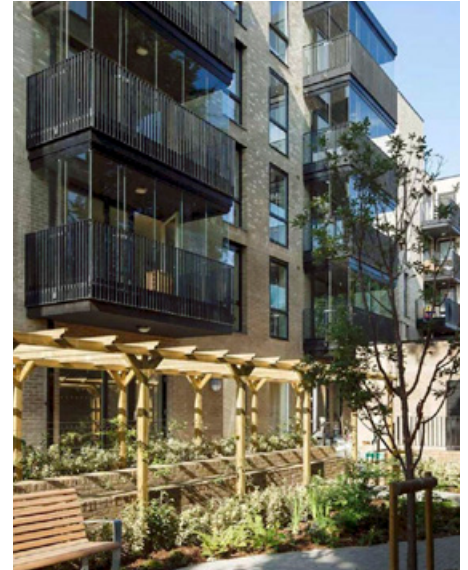
PCH says its residents have been highly impressed by the look and quality of the development. They can now live independently in secure and comfortable accommodation, within their communities and established networks of friends, family and neighbours.

CASE STUDY 8

Levitt Bernstein

Unifying three different communities into one housing project

BUCCLEUCH HOUSE, HACKNEY, LONDON



Buckleuch House is an intergenerational development, providing high quality housing in Hackney, London to create an inclusive new community.

This unusual project involved working with three separate clients - Hill, Hanover and Agudas Israel Housing Association - each with a distinct brief, to provide new homes for three different communities: first time buyers, Orthodox Jewish families and older people who need extra care. The challenge for architects Levitt Bernstein was to provide each group of residents with homes meeting their needs within a single, elegant building.

The clients required 41 independent homes for the older people, 28 affordable rent and shared ownership family homes for the local Orthodox Jewish population and 38 smaller private sale apartments.

The site was previously home to run-down bedsit accommodation.

The building does not immediately or obviously distinguish between the different groups of residents to foster a sense of community and avoid the stigmatisation of any of its residents, ultimately benefiting all occupants.

All residents now share a large green square to the front of the building, which also has a small play area for children. The older residents also have two enclosed gardens to the rear of the building - one is landscaped and has seating areas for quiet respite, while the other has raised beds to encourage people to grow their own fruit and vegetables.

The older people's homes have single-glazed winter gardens providing an additional sheltered 'living space' for residents who spend more time indoors. They follow HAPPI design recommendations, some featuring flexible open plan layouts with sliding partitions between rooms to assist occupants with mobility issues. They are at least 10% larger than that required by the London Housing Design Guide.

CASE STUDY 9



Regenerated estate makes old residents feel quickly at home

OAK TREE HOUSE, DEE PARK, READING



A much loved extra care housing scheme of 60 flats at the heart of the regeneration of Dee Park, Reading. Oak Tree House is owned and managed by Catalyst Housing.

It is the first purpose-built extra care housing scheme completed in Reading. The Dee Park Estate is currently undergoing a major regeneration to create a mixed tenure estate of flats and houses, developed in partnership between Reading Borough Council and the Dee Park Partnership (DPP), a Joint Venture of Catalyst Housing and Willmott Dixon Prime Place, and designed by architects HTA Design.

Resident engagement and involvement are key features of DPP's regeneration approach and this has been especially true of the development of Oak Tree House. The tenants have had a hand in shaping the physical environment, the gardens and most especially, the culture and ethos of the building that contains their homes. The prevailing atmosphere is warm, welcoming and enabling, and the residents have a strong sense of ownership of Dee Park.

Amenities within the scheme include a restaurant for residents, residents' lounges, hairdressing facilities and a communal garden. All 60 flats are wheelchair accessible.

The original Dee Park was a 1960s Reading Borough Council-owned estate of 1,100 properties, comprising a mixture of houses, bungalows, blocks of low-rise flats, a Primary School and a small shopping square. Many of the existing buildings, particularly the flats, included concrete construction with poor thermal efficiency. Over time, some of the properties, particularly the flats above the shops at Lyon Square, had become more difficult to let and there were incidents of antisocial behaviour. Reading Borough Council took the decision to undertake an ambitious regeneration of the whole area, with the aim of increasing density, making better use of the land, re-providing flats and introducing new shared ownership and private sale properties to create a new social mix. When complete the regeneration scheme will provide 705 new homes (426 shared ownership and private sales; 279 social rent), new community facilities including shops, a new school, a Children's Centre and improved hard and soft landscaping. Catalyst Housing will be the largest landlord at Dee Park.

The core resident group came from two local existing sheltered housing schemes. They were enthusiastic about the change in lifestyle that extra care housing would offer; early misgivings about the pending move were addressed through close working with Catalyst and RBC officers during the initial stages of the regeneration planning.

The main concerns for residents were to remain independent and to maintain the community links they had established. They fully understood the benefits offered by extra care housing as they grew older and they embraced the concept of 24-hour care onsite for those who need it. They have been very impressed with the new development.

CASE STUDY 10



Lifestyle by Engie's 16-step approach to delivery

A CRITICAL PATH WITH KEY INTERFACES APPROACH



Lifestyle by Engie, the retirement brand of Engie, is a relative newcomer to the older person's housing sector and has developed a 16-stage process to ensure the appropriate scheme is delivered.

The model combines internal governance and feasibility protocols which must be followed. The team executives retain appropriate control and oversight across the process but other key personnel within Engie lead on some steps as appropriate. This critical path with key interfaces approach has been developed following Engie's ongoing research and lessons learned from its Waterton Green scheme in Wakefield. The Yorkshire village scheme is a community of two- and three-bedroom bungalows, houses, dormer bungalows, cottage flats and luxury apartments. The scheme for the over 55s, offers a range of enabling services that are personalised.

The protocol starts by logging the opportunity on the system. It provides guidance to those wanting to review the feasibility of a site by asking them to consider key criteria - by completing the assessment - prior to presenting it to the Lifestyle by Engie development team.

A desk top and/or actual site visit will generally take place, and then a high-level residual type appraisal prior to any formal Engie compliant modelling of the land at step 2. There is demographic, financial and market analysis applied to a site Engie anticipate taking to step 3 before any significant expenditure related work is commissioned.

A site needs to score satisfactorily in order to proceed and steps may overlap depending on time constraints /the need to spend money. The protocol then continues:

- An initial engagement paper to all interested business units within Engie UK will 'flag' the opportunity.
- A more formal governance paper will request the expenditure of funds on various due diligence activities.

- A site layout and formal appraisal may have been produced by now and initial internal legal advice sought.
- Site specific Information is then undertaken, detailed key financial components - sales prices, construction and overhead costs and profit potential and coverage (floor area) - the number and type of units to be incorporated into a site layout.
- This enables calculation of the level of land offer ENGIE can potentially contribute for a site/property, including development finance considerations.
- If the financial modelling hits/exceeds the necessary performance thresholds an Investment commitment paper will be presented to local, regional and national Committees sequentially if necessary, requesting 'permission' to both make a formal bid at some stage in the future for the opportunity, expend a pre-determined amount of money on critical due diligence work - legal, engineering, environmental, planning and design etc and purchase/ secure whatever is necessary to allow the project to be realised.

The process has been applied to a new scheme at former RAF land at Wyton, near Huntingdon in Cambridgeshire, which has just gone in for planning. The campus style scheme is a residential development of 595 dwellings (C3) including 193 dwellings of retirement accommodation; together with employment accommodation, retail and other community facilities and infrastructure.

CASE STUDY 11



Sustainability and sociability go hand in hand

HANHAM HALL, BRISTOL



Older people from Bristol and from further afield have chosen to downsize and move to Hanham Hall for its sustainable credentials and community.

Hanham Hall near Bristol was England's first large-scale volume housebuilder scheme to achieve the zero-carbon standard when it was completed in 2013. The architects HTA Design led the design from the national competition through planning and working drawings.

HTA worked in close partnership with Barratt, the Homes and Communities Agency (now Homes England), South Gloucestershire Council, Sovereign Housing and Kingspan. At the core of HTA's approach was a belief that building sustainable communities is about more than meeting codes: it means creating a place where people want to build their lives, where they feel safe and comfortable, and where they are inspired to live harmoniously with their environment. Older people from Bristol and from further afield have chosen to downsize and move here for its sustainable credentials and community.

Located in South Gloucestershire in the grounds of a former hospital site, the nine hectare site adjoins the green belt and suburban housing. It provides 187 new private and affordable homes from one-bedroom flats to five-bedroom houses, with complementary community and commercial uses.

The restored Grade II* Listed Hanham Hall is central to the development, providing the site with a sense of identity and history while adding vibrancy to the community through new uses such as office space, a crèche, and cafe.

The homes are packed with innovative ideas. They prioritise views and light with generous windows oriented to maximise solar collection.

HTA's designs encourage sociability and activity. Large balconies, verandas and first floor living spaces create strong connections with the surrounding communal gardens and countryside and provide spaces to talk with neighbours. Shared gardens incorporate allotments, green houses, play areas and an orchard.

CASE STUDY 12



A mixed community that need never move elsewhere

ELLUM POINTE, BROWNHILLS, WEST MIDLANDS



Ellum Pointe is a new purpose-built £6.9m well-being scheme in Brownhills in the West Midlands that will help people aged over 55 live independently.

Opened last summer (2019), the Ellum Pointe development provides 62 high-quality, affordable one- and two-bedroom apartments for those looking to 'right size'.

It has been created by whg, the social homes landlord which owns and manages around 21,000 properties across the Midlands.

By building a range of different homes, whg has instilled flexibility and choice of living styles into the scheme. This way, as a family grows, they can move to a bigger house or downsize to a small home when they are ready, rather than have to leave an area they have grown used to.

Ellum Pointe received £1.5m funding from Homes England and is an integral part of the regeneration work that whg is leading on in Silver Court, part of the Brownhills regeneration area where over many years whg is creating a mixed-home community. This serves a wide range of different household needs - young, old, families and singles, from starter homes in the form of shared ownership, affordable rented through to outright sale. The Brownhills site has been designated as a strategic priority by Walsall Council and was specifically included in the Strategic Regeneration Framework (SRF) and Brownhills Local Investment Plan

This regeneration scheme will provide 157 new, affordable homes, of which 107 are for affordable rent and 50 for outright sale.

The project involved a complicated land assembly as there were a number of land owners and the process took years to bring to fruition. In order to provide a comprehensive development solution for this scheme, additional land belonging to Walsall Council was acquired.

These were the former market traders' car park/storage area off Silver Street and the former town gas works site off Lindon Drive.

Detailed and extensive site investigations were completed on the land due to the historic land use. These investigations identified significant contamination issues that render the land worthless. Redevelopment proposals included works to remove the most serious contamination with a capping layer and no-dig membrane being installed to complete the remediation.

To make the Ellum Pointe scheme work residents had to be decanted from their homes. whg was able to do this by building some new bungalows before the old homes were demolished for displaced residents to move into.

Ellum Pointe comprises 28 one-bedroom homes and 34 two-bedroom homes. Each apartment is built to a high specification and is suitable for people with mobility issues, with level access and a walk-in shower.

Residents have access to communal facilities, including a dining and kitchen area, TV lounge and a multi-function room, where they can meet up with their neighbours for coffee or join in with one of the variety of activities that whg hosts.

They will also benefit from whg's affordable and flexible well-being service, which offers additional support if they require it. The range of support can include regular home visits and engagement with leisure activities, which will encourage people to stay well, active and happy at home.

A designated whg well-being officer works closely with residents from the moment they decide to rent.

CASE STUDY 13

**Pollard
Thomas
Edwards**

Retirement home for women who knew what they wanted

NEW GROUND, BARNET



© PTE / Galit Seligmann

New Ground, Barnet, a unique co-housing scheme conceived by the women who now live there.

This pioneering co-housing scheme for women consists of 25 customised homes and a shared 'co-house' clustered around a walled garden.

The members of Older Women's Co-housing (OWCH) worked together for many years, pioneering the idea of a supportive community for women in later life.

The architects Pollard Thomas Edwards (PTE) collaborated with OWCH to design their ideal community on a site in Barnet, acquired for the group by not-for-profit retirement housing provider Hanover.

The women's brief was very clear: their own sustainable homes, with shared facilities that create a sense of community. The collaborative design process that PTE facilitated was a learning exercise in understanding the realities of planning and building.

While the project was under construction, Shirley Meredeen, Co-founder, OWCH, said:

"This has never been done before, and we are running it ourselves. We are making history, and we are extremely proud. We hope others will learn from us. Everyone is tremendously excited. We want to be part of the Barnet community. We are not going to be a little ghetto of older people, we want to be good neighbours."

The architects worked with the group to evolve a T-shaped layout focused around shared facilities and communal gardens that gave every home its own outlook and sunlight. The scheme has its own distinctive character, while sitting comfortably with very different neighbours - a mixture of

Georgian, Victorian, and more modern buildings. Like their neighbours, the new brick buildings front the street with low pitched pyramid roofs, while the asymmetric pitches of the garden wing roofs refer to the less domestic high street context to the East.

The main entrance opens into the shared common areas and out to the south-facing communal garden, with flats above overlooking both the garden and the street.

The shared spaces at the entry are the hub of the community. The sociable common house meeting room, kitchen and generous dining areas are complemented by other practical amenities like a laundry and drying space arranged around the mews courtyard, and a guest room with balcony that doubles as a quieter meeting space.

The large central garden is the focal point, with secret 'culture' garden and craft shed tucked into a more remote corner of the site. Like a traditional mews garage, the concealed parking is also topped by two storeys of flats. Perpendicular to the street, a 3-storey apartment block looks towards the historic spire of St John's church and overlooks the shared gardens and courtyards on either side. The homes are 1-, 2- and 3-bedroom flats, including eight socially rented homes. Using PTE's 'fabric first' approach, which maximises the benefits of orientation, air-tightness and insulation above bolt-on equipment, the homes all reach the Code for Sustainable Homes Level 4.

The New Ground scheme was completed in 2017, at a construction cost of £4.7m. It has won many awards including the Inside Housing Development Award 2017: Best older people's housing development (under 100 homes) and the European Collaborative Housing Award 2017.

CASE STUDY 14



Retirement Communities and the deferred fee model

The way leasehold fees are charged is changing and it's good news for retirees and operators who are prepared to be patient.

When older people move to specialist housing with care retirement properties, the homes they want are almost always sold on a leasehold rather than freehold basis. Many of these Retirement Communities use a fee paid on certain events - such as sale, sub-letting or change of occupancy – to contribute towards the provision of more extensive facilities, ongoing provision of services and care onsite.

The Law Commission for England and Wales looked into these fees from 2015-2017 and found that while they have been misused by some developers and freeholders in the traditional private sheltered housing sector, these fees were legal, fair and in the interests of older people if used transparently and openly. The Law Commission also noted that these fees are standard practice in other parts of the world with more mature housing-with-care markets (such as the US, New Zealand and Australia), and recommended higher levels of disclosure and transparency, which was welcome by ARCO and long term retirement community operators.

The reforms will help to reduce the uncertainty currently surrounding the legal status of deferred fees, which is already attracting record investment into the sector, thereby helping to significantly increase the supply of housing with care.

In 2018 in partnership with ILC and L&G, ARCO commissioned a report titled 'Stronger Foundations' which found a range of business models operating in the Retirement Community sector. ARCO is working with the vast majority of both current and new operators who are looking to develop new provision based on long-term business models.

In the traditional model of building retirement housing (where lower levels of support and facilities were provided), development profit is typically maximised upfront.

However, the housing with care sector is increasingly seeing an increasing shift towards the 'endloader' model in the UK, following in the footsteps of the more mature markets in New Zealand and Australia.

This model is not dependent on profit maximisation at the point of initial sale, but instead creates operational businesses capable of providing both high quality customer services (such as care and support or catering) and sustainable long-term operations.

An important catalyst for investors and customers will be sector specific regulation and ultimately legislation, which gives both investors and consumers certainty about levels of service, the way in which fees can be charged, dispute resolution and other matters.

In the process, operators are also providing a 'risk-transfer' from resident to operator, taking on responsibility for repairs, ongoing services and creating an alignment in long term resale values.

A deferred fee agreed upfront can allow customers to access higher quality housing, care and services than they might otherwise have been able to afford whilst also providing peace of mind and certainty about the upkeep of their community and thereby helping to secure the value of their property.

The move to this model is putting Retirement Communities in the domain of operational real estate as opposed to traditional housebuilding. The service offer is accordingly more complex and can only be provided through a long-term sustainable business model.

The issues that need careful consideration include:

- Ensuring that you have a model which will allow you to invest over the lifecycle of the building in repairs, maintenance and improvements.
- How would this model work for the rental market? Or is another form of tenure more appropriate?
- Are there geographic constraints as to where the business model may work? Are there considerations around land value and the property value? There will clearly be regional variation, but the key thing is the operational aspect of the village.
- Attracting the right workforce is also a challenge. It can be challenging to find the right 'Village Managers' that are able to manage property, care, leisure and long-term relationships with people.

CASE STUDY 15



Working sensitively in older people's homes

WHITTINGTON HOUSE, CARING HOMES, CHELTENHAM



Ian Williams has been working in the retirement living market for many years and has significant experience of public and private sector housing.

Working sensitively in older people's homes is just as important to us as making residential care homes, assisted living and managed facilities and individual properties fit for purpose by providing physical adaptations.

Our strategy of direct delivery means all our operatives are trained to provide high levels of customer service in sensitive environments. By working with ErosH, the national network for older people's housing and support services, we've developed the guide: Sensitive Contractors, which we hope will soon become a sector-wide best practice guide in preparing contractors for sensitive working in a market which is only set to get significantly more important.

When a woman approached our Contracts Supervisor, Mark Reynolds and his colleagues, saying she had to urgently leave the building in which they were working because her aeroplane was due, they knew exactly what to do.

"Normally you'd think 'Quick, let her past,' comments Mark. "But we'd been told what the people in this building might say to us and how to act. We were told this job was going to be a bit different."

That is because the building in which Mark and his team were working was Whittington House in Cheltenham, a care home that offers nursing, residential and dementia care support. When the Ian Williams team began work on a project to redecorate the corridors of the home, they received training in dementia.

The specialist training offered an understanding of how the condition affects people, as well as advice on how best to communicate with those affected and respect their needs.



The overall aim was to ensure that it would be possible for us to do an excellent job while also being sensitive to the needs of those living in the property. We understand that not only specialist properties required to meet the needs of those living with dementia, but we also know that when we're working on repairs or maintenance of properties for older people, we have to be familiar with the ways in which our work might be adapted.

Mark continues: "We have to take a different approach to many aspects of the tasks, some bigger than others. For example: We had to replace a handrail around the building, taking off the old one and putting on a brand new oak one. Typically, that would involve ripping off the whole handrail from both sides and only replacing it after that. But that would mean people couldn't walk along the wall, so we only took it off on one side and did about 4-5 metres at a time. Then we put a new one on, working our way along."

Conversations with the home manager also proved vital in understanding exactly how to carry out the work. "We'd go in each morning and say to the Home Manager, 'Right. We're going to go up to level two today and work our way through – is that alright?' And she might reply, 'Mr B was taken ill in the night, so you'll need to work somewhere else today'.

Our efforts paid off and we were delighted to win a Painting & Decorating Association (PDA) award for this project in 2018. 'A sensitive job carried out to a high standard and a well satisfied client' the judges concluded.

The Ian Williams team who worked on the project were proud. "It was a great project" Mark remembers fondly. "I'd love another one like it."

CASE STUDY 16



A 21st Century eco-almshouse

ST JOHN'S ALMSHOUSES, LICHFIELD



The award-winning St John's Almshouses, a new Passivhaus certified residential scheme for older people in Lichfield, completed in August 2017.

The client, St John's Hospital, are a charitable trust and historic almshouses organisation which has had a presence on the site since 1129. The existing Grade I listed buildings date from 1495 and the new 21st century development comprises 18 new flats contained within two separate buildings, which are arranged around a new landscaped courtyard.

The design won Architects' Journal Housing Project of the Year (up to £10 million).

The Almshouses provide sheltered accommodation, or more specifically, 'independent living for older people, with neighbourly support and care'. This social aspect is key to the design of the new

apartments; arranged around a communal courtyard with an oak framed pavilion at its heart, the scheme seeks to reinforce the sense of community established over centuries at St John's.

The main client objectives were to provide the highest quality environment for the residents, and to reflect the ingenuity of the 15th century listed buildings which were groundbreaking in their day. To this end the buildings were designed to be Passivhaus certified, utilising high quality traditional materials with contemporary design and detailing.

The location of the site meant both the LPA and Historic England were heavily involved in the pre-planning development of the scheme. As well as ensuring a suitable architectural response, it was essential that the impact of the building as seen from the adjacent Birmingham Road was mitigated, tree removal minimised, and bio-diversity enhanced.

A palette of traditional and natural materials was chosen, including handmade bricks, clay plain roof tiles, copper cladding and green oak

framing, with design cues taken from the use of oak in the existing buildings. The use of these high quality materials not only contributed to an aesthetic suitable for a conservation area, but also, coupled with the high levels of workmanship required by Passivhaus, should ensure the durability and longevity of the buildings for future generations of residents.

The apartments are all designed around generous entrance halls with open plan kitchen / living spaces and spacious bedrooms. They can all be accessed by wheelchair and each has been sized to allow suitable turning space throughout. The fixtures and fittings have been carefully chosen to provide a homely feel, including in the wet rooms where the trustees were keen to avoid an institutional appearance.

The inspiration for the garden design is based on a medieval monastic garden which traditionally provided food and medicine for the community. Raised beds have been incorporated to encourage all residents to participate in the growing and sharing of food, free from additives and pesticides and to socialise and support their neighbours.

Other areas of the grounds include formal lawns, a wild flower meadow, mature woodland and car parking, all of which are accessible for people with disabilities

The History of St John's goes back to the twelfth century when pilgrims came from all over the country to visit the Lichfield shrine of St Chad. It was the first building those from the south encountered – just outside the City Gates and was a place of hospitality and welcome. The Trustees believe that older people have a vital contribution to make to the community in Lichfield and are convinced that the almshouses at St John's are a living example of how older people's lives can be fulfilled and enriched by their surroundings.

Acknowledgements

The Housing Forum is indebted to the many people who contributed to the content, writing and production of this guide.

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Special thanks

To all case study contributors and to our report sponsors:

Cross Keys Homes
PRP

whg (Walsall Housing Group)
Sovereign
Ian Williams Ltd

Working Group support

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Callum Riley, Membership Marketing Manager, The Housing Forum

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Join The Housing Forum

The Housing Forum is the only cross-sector, industry-wide organisation that represents the entire housing supply chain as the voice of the industry.

We have 150 member organisations, from both public and private sectors, and are uniquely placed to interpret the whole housing market and provide a timely examination of the issues that will encourage the recognition of quality homes.

The views in this report are the views of The Housing Forum and have been contributed from Working Group discussions.

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