

Sefton Council

Older Persons' Housing Strategy Research Executive Summary of the Final Report

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Executive Summary

Sefton Council commissioned North Star Consulting & Research to undertake research into the delivery of additional (new and other) housing, including specialist provision, to meet the current and future needs of older people, together with related housing support services. The Council needs to identify the types of market specialist housing best suited to meet the requirements of its ageing population. This research looks at how the Council will deliver housing solutions to meet the need /demand of an increasingly older population in Sefton. The scope of the research focuses on delivery of housing solutions to meet needs in both the market and the affordable sectors.

The research findings presented in the report also provide an evidence base, upon which the Council can develop its Housing Strategy, Local Plan Housing and Affordable and Special Needs Housing policies, and to determine future priorities for commissioning services to support older people to access alternative housing and maintain a lifestyle independent lifestyles wherever possible.

For the purpose of the study “Older persons” are defined as aged 55 or over i.e. it includes those who will fall into old age over the next ten years.

Research Methodology

North Star developed an approach designed to meet all of the research aims and objectives as stated in the study brief. The key research methods employed included:

- Data and document review
- Review of models of older persons’ housing
- Review of the Draft Local Plan
- An online survey of registered housing and support providers
- Extensive stakeholder consultation
- Consultation with older people through a series of four focus groups
- Good Practice Review
- Developing Appropriate Housing Solutions

Key findings are presented in the main body of the report with a series of appendices providing contextual data, wider analysis and detailed supporting information.

Key Findings

Population

At the 2011 Census, Sefton had a population of 273,790. Southport is the largest sub-market with 33% of Sefton’s population, followed by Crosby (18%) and the remaining sizeable communities of Maghull/Aintree, Netherton, Bootle and lastly Formby.

Overall the local authority has a comparatively smaller proportion of younger people; 33.4% of its residents are under 29 years of age compared with 37.5% in the North West and 37.5% across England. The authority has a greater proportion of older people; 27.5% of the Sefton population are over 60, compared to 22.8% in the North West and 22.3% across England as a whole.

Formby, Southport and Aintree however have significantly larger older populations than the average for the North West and England. Almost 13% of Formby's population are '75 plus' for example, compared to 7.7% in both the North West and England.

Significantly the largest age group in Sefton is the '45 to 59' category at almost 22% of the population. This differs from the North West region and England overall where the largest single group is the younger '30 to 44' bracket. As the 45 to 59 age group get older they will form the new generation of older people and this should be taken into account when planning for future provision of service for older people.

The Office for National Statistics published 2012 based subnational population projections for each local authority in Spring 2014. The projections show a relatively modest increase in the Sefton population between 2012 and 2037 of 2.2%. This compares to 3.6% for the North West and 7.2% for England. However within this there are significant increases projected in the over 75 age group (68.3% over the 25 years) and declines within the younger age groups, most significantly, in the 45 to 59 age group of 17.9%.

Housing Supply

Data provided by Sefton Council shows that there are 42 Sheltered Housing complexes in the borough. The majority of these (19, 45%) are located in the Bootle housing market area with the second highest concentration in Southport (12, 29%) followed by Crosby (6, 14%), Maghull/ Aintree (3, 7%) and Netherton (2, 5%). There are no Sheltered Housing schemes in Formby. There is currently no Very Sheltered or Extra Care Housing provision.

The consultation findings showed that Registered and private providers future strategies in relation to existing accommodation and new provision include: carrying out stock appraisals and modernisation/ upgrading of existing schemes; and continued provision of independent living. A small number of Registered Providers (RPs) are planning to provide additional housing for older people in Sefton. Strategies include: provision of Extra Care Housing and the provision of new developments of older people which are future proof, wheelchair standard, with mobility scooter storage

The Home and Communities Agency (HCA) indicated that it is keen to support older persons housing and is looking to encourage further bids via the Affordable Homes Programme for initiatives in Sefton and is also looking to encourage older persons housing schemes. Any such developments would have to complement the wider offering and meet needs in terms of Extra Care of bungalow provision.

Models of Older Persons Housing

As part of this study we have reviewed a number of significant academic papers, articles and reviews relating to the various models of older persons housing.

There are a number of different models of housing for older people with ordinary housing with support and adaptations remaining the most prevalent followed by Sheltered Housing and then Extra Care housing. The literature identifies positive and negative issues with each model. A report by the Joint Improvement Team, CIH and Scottish Government¹ on **Housing with Care for Older People**, perhaps best sums up the situation by concluding that there is no single 'blueprint' for a successful model of provision. Rather, successful schemes are those where the location, physical design, culture, staffing, and management of housing with care all play a part in improving outcomes for older people and crucially where older people are in the driving seat over the type of care and support they receive.

The Local Plan

Sefton Council is preparing a new Local Plan for the period 2015 – 2030. Background evidence studies and the early stages of consultation have been undertaken and the publication draft of the Local Plan is currently underway.

The Council has undertaken a number of studies on aspects of housing and land supply that will form part of the evidence base of the plan. These include a Strategic Housing Market Assessment, Strategic Housing Land Availability Assessment, Gypsy and Traveller Accommodation Assessment, Housing Requirement Study and Economic Assessment of Affordable Housing Study. This Older Person's Strategy research will help inform the delivery of the Local Plan, as well as supporting the development of the Council's new Housing Strategy and Health and Well Being Strategy.

Conclusions

Overall current provision for older people is characterised by a certain amount of diversity and choice. As we have described, the vast majority of older people live in 'mainstream' housing however there is a requirement for specialist provision and scope for a greater number of options within the specialist provision.

There are a number of key areas which make up a suite of appropriate solutions and we present them here under the following headings:

- New Development and Provision
- Development Standards
- Sheltered/ Assisted Living
- Extra Care
- Strategic Planning and Joint Working
- Information and Advice

¹ <http://www.scotland.gov.uk/Resource/0043/00436806.pdf>

- Aids, Adaptations and Continued Use of Existing Housing
- Preventative Support Services

The majority of older people in the Borough will not move or will choose to meet their needs in the private market by moving to smaller/more manageable accommodation or to be closer to family to receive support. This is particularly true of the more affluent housing markets in the Borough where older people are likely to have sufficient equity in their existing homes to meet their arising need in the private market. However, we know that suitable, appealing homes for those wishing to downsize are in limited supply and that new supply in the private market is unlikely to directly address the needs of older people without intervention, rather it will develop mainly to meet the need of family households and first time buyers.

Most specialist accommodation provision will be required in the higher demand areas in the north of the borough with a higher proportion of older people. The north of the borough is also more likely to be most viable and an attractive development proposition for the private sector. Some affordable provision will also be required. In the South of the borough where housing need and demand is more likely to be in evidence in the social rented sector affordable housing should also be provided, with much less emphasis on market developments which are likely to be less viable given lower house prices and a smaller population of owner occupiers. Need in the South of the borough will be characterised by specialist affordable accommodation and it is likely that development economic viability will be more challenging and often requiring subsidy.

Recommendations

The recommendations in this report are based on a range of development solutions from new homes aimed at older, independent households to the direct provision of specialist accommodation with care and support. Specific development of Sheltered or Extra Care Housing is considered and all of these should be contemplated, alongside the recommendations in relation to advice/support and planning policy, to ensure that a range of needs are met and that the need for and provision (and cost) of specialist housing and with care is minimised. Funding homes for older people requires subsidy in areas out with private development opportunities which are limited to markets where development can be delivered commercially.

In relation to all of the recommendations, an early dialogue should be undertaken with private developers, RPs, care providers, social service, service users and funders, particularly the Homes and Communities Agency (HCA) to inform their development and delivery.

New Development and Provision

Recommendation 1: Sefton Council consider the use of planning policy to encourage the provision of homes suitable for older households as part of new build developments.

Recommendation 2: Sefton Council should consider the impact of such a policy as part of the next Economic Viability Assessment to be undertaken, either as a percentage of developments as a whole or as part of the affordable housing provision.

Recommendation 3: Sefton Council should work with house builders, RPs and the HCA to consider ways to aid the design process and agree minimum standards and look at best practice in provision of this type in other areas.

Recommendation 4: Opportunities to access funding to support new provision should be taken where possible. Whichever way this is taken forward, consideration should be given to the tenure mix of provision for older households and the housing market area in which they are to be developed.

Recommendation 5: Consideration should also be given to whether some or all of the older persons accommodation provided across tenures should be restricted by condition to occupation by over 55s or over 65s and/or those with a local connection to the area.

Commuted Sums

Recommendation 6: All commuted sums which the Council are eligible for should be collected. This should be the case even where local sites for their use have not yet been identified. If a local site cannot be found commuted sums should be used elsewhere in the borough. The use of pooled commuted sums towards provision of older persons accommodation should also be considered.

Development Standards

Recommendation 7: Developers of new build development should be encouraged to consider development to the criteria in the Lifetimes Homes Standard/proposed Category 2 in the proposed Housing Standards (currently out to consultation) across all tenures given that the retrofitting and subsequent removal of aids and adaptations in existing homes is often not cost effective.

Recommendation 8: Sefton Council should include a policy in its draft Local Plan in line with the guidance in the consultation on Housing Standards set out in chapter 4 above; this should cover both category 2 and 3 homes.

Recommendation 9: In advance of the adoption of the Housing Standards consideration should be given in the Sefton Local Plan as to the locations where Category 2 and 3 housing will be justified in relation to the factors set out in the guidance above, the proportion of each type of housing required and the requirements in respect of affordable and market housing.

Sheltered/Assisted Living

Recommendation 10: The Council should consider that any affordable housing commuted sums from mainstream developments are specifically applied to support the provision of older people's housing in the same or other parts of the Borough.

Recommendation 11: Particularly in the Bootle housing market area, the Council should seek to support and encourage the modernisation and refurbishment of existing Sheltered Housing where appropriate to improve the overall quality of the available stock and support the older resident population.

Extra Care

Recommendation 12: We consider the provision of Extra Care to be an appropriate solution given the size and age of the older population. There are two schemes with planning permission and currently under development at the 90 unit scheme at Damfield Lane and 24 units with dementia care at Parkhaven Court, both in Maghull. We recommend that the Council use these schemes to learn lessons for the provision of further such developments.

Guidance

Recommendation 13: The information from the schemes in Maghull should inform the development of further Extra Care across the Borough. This exercise should also aim to ascertain the interest from developers in provision of this type. Given that there are few sites in the area in Council or public ownership, developments of this type are likely to be brought forward by private providers and RPs and the possibility and suitability of allocated or windfall sites to accommodate development should be considered. Any guidance should not be overly onerous as to stifle interest but rather it should set out minimum standards for Extra Care Developments.

Recommendation 14: In conjunction with a stakeholder group which includes service users and providers, the Council should also consider developing Extra Care Design Guidance, perhaps alongside the development of house types and accessibility standards as set out above. Reference should also be made to the HCAs Non Mainstream Design Guidance from 2012².

Recommendation 15: The Council should also consider the development of a Care and Support Strategy which, amongst other areas, should seek to provide assurances to potential providers of housing around the type of care which will be available in the future. Sefton Council should also consider this approach as developments progress.

Development

Recommendation 16: In relation to the development of new Extra Care facilities, Sefton Council should proactively seek partners and site opportunities to develop Extra Care for sale and mixed tenure across the Borough and develop a model specification for Extra Care that will aid providers as they consider development in different markets in the Borough.

² <http://www.homesandcommunities.co.uk/download-doc/6434/10967>

Strategic Planning and Joint Working

Recommendation 17: We recommend that the development of an overarching Older Persons Strategy is progressed as an integral element of the Borough Housing Strategy. We note that the work to develop a new housing strategy will commence during early 2015 and it is advised that Older Persons' Housing should be an important component of this.

Recommendation 18: We also recommend that a Housing Strategy and Monitoring and Advisory Group is established with formal reporting structures. This group should consist of housing, health and social care commissioners and delivery agents including RPs, Support Providers, the voluntary sector, private sector providers, developers, and representatives from the older population across the borough. Older people should also be included within the Advisory Group membership.

Recommendation 19: Joint working and partnership should extend beyond the Advisory Group and colleagues should work to ensure that Housing is represented in the Health and Social Care structures and should, for example, be a partner within the work of the Health and Wellbeing Board.

Information and Advice

Recommendation 20: A gap identified in Sefton is the provision of prevention and support services, with a need for greater signposting towards community based services. Voluntary services are very active in Sefton but there is a lack of signposting towards these. A Directory of Services is currently being developed/ updated and once in place should be made widely available to service providers, support agencies and older people.

Recommendation 21: The older persons housing strategy should highlight the need for support through informal networks of family and friends, alongside provision of high quality information and advice service at a local level. The Council should work with RPs and other providers to ensure these services are in place. It should also explore the potential for the housing options approach.

Recommendation 22: Sefton Council should further explore the potential for developing 'One Stop Shop' approach to provision of services.

Recommendation 23: There is a need for good, understandable advice to enable older people to make informed choices and Sefton Council should review current provision of information and advice services and publicise sources of information for older people and this could be delivered via the action plan from the Older Persons Housing Strategy.

Aids, Adaptations and Continued Use of Existing Housing

Recommendation 24: Across the area there should be an increased focus on prevention. As the population ages, living in existing homes, the need for aids and adaptations will increase. Joint working should consider how to achieve more effective delivery of aids and adaptations.

Recommendation 25: Health and social care outcomes and indicators need to give greater priority to the impacts of preventative housing services for older people designed to improve the home environment, promote independence and reduce demand on the care and health systems.

Recommendation 26: Fuel poverty has been highlighted as an issue in Sefton. Collective energy provider switching schemes and insulation schemes could be targeted at those older households in greatest risk. A pilot scheme developed by the Affordable Warmth Team is currently running in Sefton an evaluation of this scheme should be undertaken with services rolled out where it proves beneficial.

Preventative Support Services

Recommendation 27: The Council should explore ways to further develop assisted technologies as part of a suite of preventative and support measures, including identification of potential delivery partners.

Recommendation 28: Support and advice services should continue to provide face to face contact, home visits, paper and telephone based information which are more accessible to the older generations.

Recommendation 29: The Council should consider the creation of a dedicated Home Improvement Agency where there are opportunities and finances to do so. The Council should consider the wider efficiencies which access to trusted trader and handyman services would provide and look at models to deliver this, including cross subsidy from self funders purchasing services from the scheme.