

## DISABLED ADAPTATION PROCEDURE



### MONITORING INFORMATION:

<b>POLICY/PROCEDURE/STRATEGY:</b>	<b>DISABLED ADAPTATIONS PROCEDURE</b>
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<b>OWNER:</b>	<b>INDEPENDENCE, WELLBEING AND OT SERVICE MANAGER</b>
<b>APPROVAL ROUTE:</b>	<b>EXCUTIVE MANAGEMENT TEAM</b>

# Disabled Adaptation Procedure

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## 1.0 Purpose

Teign Housing aims to provide an excellent service to customers, by providing safe suitable housing, independent living, privacy, confidence and dignity for individuals and their families.

The purpose of this document is to provide a guide to good practice for staff at Teign Housing who may be involved in the provision of adaptations for customers who may have a disability.

The procedures set out guidance on operational activities.

## 2.0 Links with Vision, Values and Strategic Aims

### Our Vision

We dedicate ourselves to providing good quality homes and tailored housing support. Working with our diverse customers and trusted partners we provide effective services that bring long term benefits to all. We are sustainable in a fast-changing environment and reinvest our surpluses to grow our communities.

### Our Values

We focus on the core of our business with our strategic aims. What is important to our customers; providing excellent services and quality homes - and what is important to our continued viability; growing our sustainable business.

### Excellent services

We will deliver high quality services to all of our customers and partners. We will provide considerate customer services, empowering housing services and effective repairs.

### Quality homes

We will invest in new and existing homes by maintaining high standards of repairs and improvements to our current homes and developing new homes to meet the needs of local people.

### Sustainable business

We will strengthen our business by continually improving our governance, increasing the value of our work, seeking ways of joint working with our partners, and investing in our staff.

**Respect**

We treat people with empathy, respect diversity and provide quality customer service. We appreciate the relationships we build and, with our customers, contractors, and partners, we are proud to be Team Teign.

**Resourceful**

We maximise our resources through innovation and by using our money in efficient ways. We look for opportunities to expand our business by building new homes and creating and growing valuable services. We recognise our role in supporting the local economy.

**Ethical**

We value our responsibility as a charity providing homes and services for those who need them and as an employer. We are an organisation with heart and strive to offer an empowering workplace and the personal service our communities want.

**Strategic aims**

We focus on the core of our business with our strategic aims. What is important to our customers; providing excellent services and quality homes - and what is important to our continued viability; growing our sustainable business.

**Excellent services**

We will deliver high quality services to all of our customers and partners. We will provide considerate customer services, empowering housing services and effective repairs.

**Quality homes**

We will invest in new and existing homes by maintaining high standards of repairs and improvements to our current homes and developing new homes to meet the needs of local people.

**Sustainable business**

We will strengthen our business by continually improving our governance, increasing the value of our work, seeking ways of joint working with our partners and investing in our staff.

### 3.0 Policy Statement

Teign Housing are committed to meeting the needs of its customers for safe and suitable accommodation, independence, privacy and dignity. We aim to help people to continue to live independently and comfortably in their homes for as long as practically possible, with minimum intrusion or intervention.

A proportional annual budget has been allocated for carrying out adaptation work on Teign Housing properties up to a maximum of £10,000 per property. In addition, applications can be made for Disabled Facilities Grant where when the criteria as set out in the Homes Without Barriers Protocol is met. This is intended to ensure the most effective use of limited budgets.

We will ensure our processes are cost effective and represent value for money. We take a user-centred approach to providing adaptations in our properties. We recognise that adaptation is not just a matter of equipment and building work but is about people and how their living environment disables them. Although it is Teign Housing's and the LA's responsibility to determine what is reasonable and practicable, it is our aim to involve customers at each stage of the process and to respect their input. This is the case whether the disabled person is the tenant or is another member of the tenant's household. We will carry out a customer satisfaction survey following every adaptation that we completed.

### 4.0 Definitions

- **OT** - Occupational Therapist.
- **Referral** - A request for adaptations either directly or through another agency.
- **Statement of need** - A full report detailing the OT's recommendations and priority grading.
- **Customer** - Any applicant, tenant, leaseholder, or advocate contacting Teign Housing or its joint agency partners to seek help or information which may be assisted through Equipment and Adaptations.
- **Partner Contractor** - Building Contractor who is in a partnership arrangement with Teign Housing to carry out Adaptation works.
- **TC** - Teignbridge Council.
- **CLG** - Department of Communities and Local Government

- **DCC** - Devon County Council. (Adult & Community Services and Children & Young Persons Services)
- **NHS Trusts** - Local National Health Service Hospitals and Health Centres.
- **HIA** - Home Improvement Agency
- **ADAPTATION CATEGORIES** - Please refer to page 14 for definitions
- **REMAS** - Rapid Equipment & Minor Adaptations Service.
- **DFG** - Disabled Facilities Grant.

## 5.0 Scope

This procedure covers all Teign Housing's existing stock and customer base as defined above.

## 6.0 Links with Key Policies

This Policy supports the principles and standards embodied in Teign Housings:

- Equality & Diversity Policy
- Asset Management Strategy
- Teign Standard
- Repairs & Maintenance Policies
- Allocations & Transfers Policy

## 7.0 Responsibilities

The responsibility for carrying out the activities outlined within the procedure is as follows:

### **Head of Asset Management and Development**

Responsible for:

- Overall responsibility for the service and the budget.
- Overall responsibility for continuous improvement, reviews and monitoring.
- Forging strong relationships with joint agencies in the local areas in which we operate for the improvement of the service.

### **Property Services Manager**

Responsible for:

- Representing Teign Housing at external meetings and forums and for liaising with the Local Authority & Joint Partners about Policy Matters in this area.
- Ensuring that operational procedures are in place and working effectively.

- Responsibility for policy initiatives and ensuring best practice is embodied within the service.
- Maintaining relationships with external agencies involved with the care of the disabled in order to improve the service to our customers.
- Liaising with partner agencies & contractors in order to increase value for money in obtaining aids and adaptations for customers.

### **Surveyors & Asset Management Administrators**

Responsible for:

- Administering applications for aids and adaptations received by Teign Housing either via GPs, OTs, or directly from a customer or their appointed representative.
- Validating all works ranging from <£100 minor adaptations to major adaptations costing up to £30,000.
- Maintaining records on all adaptation requests made and work carried out.
- Assisting customers in applying for DFGs.
- For tenant liaison throughout the process.
- For ordering work, liaison with Contractors, and OTs
- The adaptation request, where appropriate.
- Self-assessing Adaptations valued at less than £1000 in line with the trusted technician guidelines
- Assisting in sourcing alternative funding for equipment and adaptations.
- Recording on our Housing Management systems all properties with adaptations.
- For giving technical advice and, where necessary, drawing up specifications for work.
- Responsibility for liaison with OT's and post inspections. Also responsible for the tendering of contracts for adaptation works, ensuring an effective supply chain is in place.
- When work cannot be carried out as per the request from the OT, the surveyor must discuss proposed changes with the customer and the OT making sure that both parties are fully aware of the changes to be implemented. However, these must not be carried out without the prior approval of the OT. The needs of the customer as indicated by the OT should be met wherever possible and practical.
- Making final decisions on practicality.
- Facilitate means testing in accordance with LA procedures for DFGs as determined by statute.

- Liaising with LA Housing departments when undertaking full means testing, providing all necessary information to enable the LA to make the assessment.

### **Occupational Therapist (In-house/NHS or Local Authority (LA))**

Responsible for:

- Undertaking the medical, physical, social, and psychological assessment of the customer's needs and submitting a full statement of need to Teign Housing within the agreed indicative time targets.
- For making any referrals including to Care Direct Plus within 48 hours of receiving
- Responsible for liaising with the Surveyor and if necessary requesting a joint visit where needs are complex and practical solutions are not obvious.
- Communicating regularly with Teign Housing, respecting resources, capacity and case load.
- Where appropriate, explore alternative housing options with the customer in line with Teign Housing's policies and procedures.

### **Local Authority District Councils**

Responsible for:

- Administration of Choice-based lettings in partnership with landlords.
- Delivering by way of grant funding, assistance for one-off major adaptations for persons with disabilities if certain eligibility conditions are satisfied. The maximum value for DFG is currently £30,000, the minimum value is £1,000.
- Funding (in part) the Home Improvement Agency Service for clients needing assistance with adaptations.
- Where applicable, provision of Means Testing Service for customers in need of standard or major adaptations, but not claiming a passport benefit.

### **Devon County Council**

Responsible for:

- Providing adequate resourcing for Adult & Community and Children and Young Persons Services, REMAS and the Complex Care OTs to be able to process referrals within the agreed Homes Without Barriers indicative timescales, submitting full statements of need to Teign Housing within 4 weeks of receiving the referral from Teign Housing or receiving contact directly from the customer.



## 8.0 Customer Involvement

This procedure has been developed and approved by customers which includes customers with disabilities, service users and taking into account their feedback.

All works are discussed in detail and agreed with the customer before work proceeds, and during works the Surveyor visits the customer to check that the works are to the customer's satisfaction.

All customers are given the opportunity to feedback on completion of the works through a customer satisfaction survey.

Teign Housing will ensure information is available and provided to all customers contacting us to enquire about an aid or adaptation. More proactively, we will also place periodic articles in our tenant newsletters advertising the service. Also, information on obtaining adaptations will be available on our website.

Teign Housing has customer profiling information stored on the Housing Management system. This information is systematically referred to and updated when processing an adaptation to ensure the customer's needs are met as far as is possible.

## 9.0 Procurement

Teign Housings Procurement Policy and Procedure ensure that the best use is made of a limited resource. This is achieved by:

- Competitively tendered partnering arrangements with approved Contractors.
- Negotiated supply chain agreements making use of local procurement consortiums.
- Offering adaptation features to customers of Designated and Sheltered properties while work is undertaken as part of the Improvement Programme.
- High Quality Specification ensuring reduced maintenance costs.
- Procurement of Goods and Services in co-operation with the Advantage South West Procurement Consortium.

## 10.0 Funding

Adaptations provided by Teign Housing valued over £1,000 and up to £10,000 should be administered in accordance with Local Authority procedures for Disabled Facilities Grants (DFGs). DFGs administered by the Local Authority are subject to a mandatory and full means test.

The means test may produce an outcome resulting in a contribution being required, to be paid by the applicant, towards the cost of works needed.

All aspects of income and capital of the household, are subject to the means test.

Documentary evidence is required as proof for all means tests, including up to 52 weeks financial evidence from the date of application.

Examples may include (but not exhaustive):-

- Wages
- Pensions – occupational/personal/state
- Benefits (other than those passported) i.e., Employment & Support Allowance (ESA), Child Benefit, Tax Credits, Sick Pay, Maternity Pay, Industrial Injuries Benefit
- Child Support
- Savings/Investments/Capital

At present DFGs for children and young people are not subjected to a means test (up to the value of £30,000).

- Child – Someone between the age of 0 and 16th birthday.
- Young Person – a person over 16 but under 20 and in full-time education. For most purposes (but not all) the Authority can make decisions about whether a child is to be treated as a child of the family by following decisions made by HMRC about Child Benefit.

Applicants in receipt of a 'pass porting benefit' at present automatically qualify for a 'zero contribution' towards the cost of any works under a DFG, up to the value of £30,000.

passporting Benefits:-

- Income Support
- Income-based Jobseeker's Allowance (not contribution-based JSA)
- Working Tax Credit and/or Child Tax Credit provided that the annual income for the purposes of assessing entitlement to the tax credit is less than £15,050 per annum.
- Guarantee Pension Credit (not Savings Pension Credit alone)
- Housing Benefit
- Council Tax Benefit (does not include 'Single Occupancy Discount')

The annual income for the purposes of assessing entitlement to a tax credit is cited on the Notice of Award issued by Her Majesty's Revenue & Customs (HMRC) for the award in

payment. This is typically the gross taxable income in the previous tax year, minus some deductions.

For all adaptations funded by Teign Housing up to a maximum value of £10,000, the following provision has been made:

- Teign Housing currently allocates a budget subject to annual review which can be supplemented as necessary from the Planned Maintenance Budget.
- Money from this budget can be made available to contribute to removal costs where customers are under-occupying and an alternative home is available to them, but the costs incurred in moving is acting as a deterrent to the customer.
- Subject to agreeing with the relevant Local Authority that this is the most appropriate course of action, we will assist qualifying customers to seek DFG funding for qualifying major adaptations or a package of adaptations as specified within the Homes without Barriers Protocol. This will be to ensure the most effective use of all partners' budgets. Teign Housing will take on the administration involved in assisting the Tenant in making the application and will also take on the full design and administration of the works in this situation.
- It will also be recognised that a significant proportion of LA DFG funding comes from central government and is therefore subject to public expenditure restrictions. The changes to budgets that will occur in any future years may impact on the operation of the agreements contained in this Policy and may result in amendments to it.

## 11.0 Procedure

\*See Appendix 1 - Disabled Adaptation Procedure flow chart

### 11.1 Assessing Eligibility of the Applicant

Adaptations are assessed individually by the OT and can be categorised according to their value:

#### Definitions

**Minor adaptations** – these involve minor changes to rooms and generally cost less than £1,000. Examples include grab/hand rails, fixed toilet frames, over bath showers, additional rails to stairs, removal of internal door thresholds, lever taps, extra steps to doorways, installing or moving door entry phones, flashing smoke alarms and door bells, vibrating pad

in conjunction with smoke alarm, upgrade speech modules on warden call systems or door entry systems and some ramps.

**Major adaptations** – these involve extensive structural changes to rooms and cost over £1,000 and up to £10,000. Examples include larger ramps, level access showers, stairlifts, through lifts, alternative or extra heating, internal alterations to walls or doorways, accessible kitchen fittings, automatic door opening systems and track and hoist systems.

**Complex adaptations** – these involve extensive structural changes to the property, usually requiring planning and/or Building Regulation approval and include extensions and significant alteration to the external walls and access routes.

Housing Association Responsibility	Local Authority Responsibility
1. To pay for all adaptations up to £1,000.	1. To fund the remaining cost of all adaptations excluding those within categories 1&2 under HA responsibility.
2. To fund the remaining cost of all ramps, level access/other showers and straight stairlifts.	2. To consider requests from HAs to top up funding for schemes listed as HA responsibility, particularly where costs are high and for multiple adaptations.
3. To consider funding any adaptations outside of these categories which fall within similar cost bands up to a maximum of £10,000.	3. The social services authority or health trust to consider funding from re-ablement budget. In particular for hospital discharge cases, preventative work for those who would otherwise be in danger of admission to hospital, or residential care and where adaptation work would enable care packages to be reduced.
4. To consider requests from LHAs to top up funding for schemes listed as LHA responsibility, particularly where the adaptation adds value to the property and for schemes above £30,000.	
5. To take responsibility for ongoing maintenance and servicing of equipment – in the case of some items this may be a chargeable service to the tenant.	

## 11.2 Which Adaptations may be provided?

The table below details the Adaptations that may be provided.

<b>Support</b>
Additional handrails on staircase
Grab rails and support rails
Drop down supports (toilet)
<b>Bathing and Toileting</b>
Installation of Easy Access Showers
Provision of over-bath showers
Installation of wash/dry toilet (e.g. Clos-o-mat)
Replacing taps on baths and basins with lever taps
Replacing stop taps with remote valves
Re-siting taps
Body dryers
Lifting and lowering of basins
Provision of specialist basins
Installation of non-slip flooring
<b>Lifting and Hoisting</b>
Provision of power supply and ceiling fixings for hoist (hoist & track provided by others)
Vertical through-floor lift (communal areas only)
Stairlift (*not permitted in Communal Areas)
<b>External</b>
Provision of height-adjustable washing lines
Provision of wheelchair storage (subject to circumstances)
Improving access to rear garden (subject to circumstances)
<b>Heating and Electrics</b>
Supplementary radiators or heaters
Re-siting heating controls
Heating upgrades
Improved lighting to improve visibility
Vibrating smoke alarms
Flashing/ audio or remote doorbells
Provision of specialist oven and hobs (where these fittings are provided)
<b>Access</b>
Widening, re-hanging or removal of doors

Replacing doors with folding or sliding doors
Provision of suitable handles, locks, etc
Provision of pull handles, kick plates and edging strips
Provision of door entry system to own and any communal doors
Installation of flashing light doorbell
Adjusting height of kitchen worktops
Relocating doors

### 11.3 Where Adaptations are not reasonable & practicable

The following situations are examples where a customer's request for adaptation will not be agreed:

- i. The occupancy is temporary in nature: Occupancy Agreement, License or Assured Short-hold or Starter Tenancies\*.
  - ii. The property is Leasehold (they may however be eligible for DFG).
  - iii. The tenant is seeking to move or transfer or has submitted a valid right to buy application.
  - iv. An extension or loft conversion is required in the form of an additional room on a property which is of non-traditional construction.
  - v. Portable equipment will not be funded by Teign Housing including specialist WC seats, induction loops, portable heating or lighting etc.
  - vi. The removal of adaptations to allow for decorating will not be funded.
  - vii. The removal of Adaptations in a suitable property e.g. a sheltered or designated dwelling.
  - viii. The property is a general needs or family property which is under-occupied and a more suitable property is available, but the tenant is unwilling to move even with the offer of monetary assistance, (see removal costs below).
- Teign Housing will however undertake minor adaptations up to the value of £1000 in these circumstances.\*
- ix. The property is an upper floor flat, which is not served by a passenger lift.
  - x. The property is deemed unsuitable for adaptations due to its, location, accessibility, construction type or designation.\*

\* In certain circumstances we may consider undertaking standard or major adaptations in properties usually deemed unsuitable.

This will only occur if there are clear, medical, social, Cultural or psychological reasons for the tenant to stay in the property, as detailed in the Statement of Need.

Note: Teign Housing will also consider the installation of straight flight stairlifts as these can be removed and reused – however this will be evaluated on a case by case basis but exclude installations on communal staircases.

### **Stair Lifts in Communal Areas**

Teign Housing will not permit the installation of stair lifts on communal staircases as their presence would compromise the effectiveness of the means of escape for occupants and the Fire Service in the event of a fire occurring.

The presence of electrical equipment associated with a stairlift would also potentially provide a means of ignition if the stair lift sustains damage either accidentally or due to vandalism.

This is consistent with the responsibilities placed upon us to ensure we comply with the requirements of the Building Safety and Fire Safety Bills.

#### **11.4 Examples of Properties more suitable for adaptations**

To assist all partners in making decisions concurrent with this Policy, the suitability of a property for standard or major adaptations can be ascertained by a combination of all the following features:

- A level access approach to the main entrance. Alternatively, no more than 3 standard steps height difference between inside and outside levels, with sufficient space for a DDA-compliant access ramp to be practically and cost effectively installed
- A single storey dwelling, either a flat or bungalow which has access as above, or is serviced by a passenger or stairlift within a scheme.
- For Major Adaptations, the property needs to be of traditional construction, e.g. not system-built units such as Cornish Units. These buildings have a structural frame which cannot be altered or extended cost effectively without risk of catastrophic collapse.
- The existing building structure and layout needs to practically lend itself to the proposed alterations, i.e. the removal or re-location of a non-load bearing wall is acceptable, but the removal of load bearing walls would not be reasonable.

The following terms also apply

- i. We do not provide parking within the boundaries of a property unless parking restrictions operate immediately outside the property and the statement of need clearly states and highlights severe mobility issues.
- ii. Where a property has more than one entrance we will only adapt one (unless a specific reason is given in an OT's Statement of Need).
- iii. We do not provide landscaping unless the work is essential for access.
- iv. We will not adapt access for electric scooters. We may provide a socket for charging. We will not provide storage units as these are deemed portable.
- v. If a tenant is under-occupying their home and a more suitable property is available, but they are unwilling to move even with the offer of monetary assistance, only minor adaptations will be undertaken to the value of £1000.

### **11.5 New Build Properties**

Teign will consider undertaking reasonable adaptations to new build properties to assist with housing families or individuals that require adaptations, subject to certain conditions:

- The referral or request for adaptations is supported by an Assessment of Need provided by a suitably qualified Occupational Therapist.
- The Assessment of Need confirms that the adaptations to the property will fully meet the longer-term needs of the family or individual.
- The adaptations to the property can be reasonably incorporated into the construction of the property during its development (properties already completed will not be retrospectively adapted)
- Adaptations costing in excess of £10,000 will need to be supplemented by confirmed Disabled Facility Grant funding from the Local Authority or other supporting agency.

### **11.6 Removal costs**

In cases where a request to adapt the property has been refused, for instance because it is a family property which is under-occupied, and where the customer is not happy moving to a more suitable property because of the costs they will incur, we can recommend that a contribution is made to the costs of this removal. Annual budgetary provision is available for this purpose. This payment forms part of an incentive package may include:



- i. Support to customers in applying for transfers via Devon Home Choice
- ii. Accompanied visits to potential alternative accommodation
- iii. Assistance in booking and organising removals if required
- iv. Physical assistance in disposing of rubbish or obsolete furniture

In circumstances where there may be a case for additional funding to be made available to assist with the moving costs, the exact amount offered needs to be decided with the agreement of the Head of Maintenance. This facility will only be used where a net saving can be made through not undertaking adaptations in properties which are not suitable.

### **11.7 Alternative funding**

We will endeavour to seek additional Disabled Facilities Grant funding from the Local Authority for major or complex adapts, multiple adapts in the same property, or when our budgets are committed, and the demand exceeds our existing budgetary provision.

Funding will also be sought from other organisations such as The Royal British Legion, and the RNID, RNIB and County Social Services where appropriate.

### **11.8 What to do if Adaptations are not reasonable and practicable**

These would be the usual actions in this circumstance:

- i. Discuss the option of transfer and advise and assist the customer to apply to Devon Home Choice
- ii. Advise the customer to discuss the possibility of applying for additional benefits, which may enable them to pay for care or support with the local Authority.
- iii. See section entitled Applying to Devon Home Choice.

### **11.9 Timescales & Priorities**

The works will be prioritised into three main categories according to the procedure set out below, and will be recorded on the database. This will enable all the information to be contained in one place, but be easily identified into the low, medium and high priorities.

#### **Priority A – Urgent**

Definition:

- Where there is an immediate risk to the tenant's health and safety.
- Where the tenant cannot be discharged from hospital unless the adaptation is carried out.

- Where the tenant cannot carry out the essential functions of toileting or washing with or without help (evidence of this may include the fact that a person has to bathe at an assisted facility outside the home and/or has to use a commode in the home).

### Priority B – Standard

Definition:

- The tenant has difficulty carrying out essential activities but is able to manage with available support.
- If an adaptation is not carried out a threat to health and safety may occur.
- Where the absence of an adaptation prevents or seriously inhibits mobility around and use of the home.

### Priority C – Moderate or Low

Definition:

- The tenant is unable to maintain a satisfactory quality of life.

### Timescales:

Stage	Minor (working days)	Major - Urgent Priority (working days)	Major - Standard Priority (working days)	Complex (working days)
1 Initial enquiry at first point of contact to OT recommendation provided to adaptation service (HA or LHA)	N/A	5	20	20
2 OT recommendation to approval of scheme (grant approval or issue of works contract/order)	N/A	30	50	120
3 Approval of scheme to completion of works	20	20	80	80
<b>Total time from customer request to completion (working days)</b>	<b>20</b>	<b>55</b>	<b>150</b>	<b>220</b>

WITHIN THESE BANDS, PRIORITY WILL BE BASED ON DATE ORDER

### **11.10 Applying to Devon Home Choice (DHC)**

Where it is not possible or inappropriate to carry out an adaptation to a property, priority can be awarded to applicants through Devon Home Choice to assist them in moving to more appropriate accommodation.

The customer should be advised to apply for a transfer through DHC, either online at [www.devonhomechoice.com](http://www.devonhomechoice.com) or through their Local Authority Housing Options Team.

It is important that the applicant completes the Health and Wellbeing form stating why their property is not suitable.

The OT or surveyor, who has refused the adaptation, must send a request to the relevant local authority team to give the applicants the priority for being unable to adapt the property (Effective Management of Social Housing within Devon – Major Works). This priority will place them in the High Band (C) for a transfer, however other factors relating to health and wellbeing could indicate a higher banding.

Properties will be advertised through Devon Home Choice online, applicants without internet access can collect a newsletter from their local authority offices and other designated collection points (check with local authority).

If a suitable property is advertised, the applicant then places a “bid” for the property, either on-line, or by phone,. If the applicant is the highest banded applicant for that particular property, the Landlord will contact them to advise them directly. If a tenant is particularly vulnerable and unable to bid for themselves, they can elect a representative to bid on their behalf.

### **11.11 Updating the System**

At each stage of the process the Asset Management Coordinator must update the appropriate Adapts Database, Works History and Stock data and enter the information below:

Application and Assessment stage

- The date of the referral
- The priority of the referral
- The contact details of the tenant
- The proposed works

- The receipt date of the referral
- The name of the Occupational Therapist
- The date the post-referral letter was sent to the tenant
- The date the survey was sent
- The date the property was surveyed
- The date the order was raised
- The date the works were completed
- The quote and any additional costs
- The name of the contractor

#### Works ordered

- Works order raised on housing system
- Construction phase KPI's monitored

#### Works complete stage

- Date works complete
- Actual cost of work
- Stock data updated on receipt of invoice & certification
- Date satisfaction survey letter sent
- Date "work complete" letter sent to OT
- Final cost
- Results of the Customer Satisfaction Survey

### **11.12 Recording the adaptation on the Stock Data base**

This record of adapted properties will be used for statistical analysis and will also assist in the allocation procedure, by ensuring that adapted properties are readily identified and are allocated, whenever possible to those who require the adaptations, therefore making best use of the company's resources.

### **11.13 Completed works and the satisfaction questionnaire**

A telephone satisfaction survey is undertaken for the customer to get their feedback on the service that we have provided. This is recorded in a satisfaction scorecard

A record of the adaptations to the property is placed in the stock condition database.

### **11.14 Survey Questionnaires**

When satisfaction questionnaires are completed, the Administrator should note any comments that show we have failed to carry out work as ordered. If there are any complaints or failures, then appropriate action should be taken by the Surveyor to rectify these as soon as possible.

Other comments should be responded to in a letter to the customer, which explains to the customer why some things were done as they were and why other things could not be done (e.g. if it does not comply with our policy).

### **11.15 Complaints**

All complaints will be managed by the Resolution Manager following Teign Housing's Complaints process.

## **12.0 Monitoring**

The budget for Aids and Adaptations will be held by the Head of Asset Management and Development and will be monitored on a monthly basis by the Property Services Manager.

The Surveyors and the Administrators will monitor performance on timescales for turning around requests and completing the work.

Performance indicators will include: Cost, Timeliness, Quality, Customer Satisfaction and Health & Safety.

Satisfaction levels will be collected for each Adaptation carried out and results compiled on a quarterly basis.

Performance and satisfaction levels will be reported to existing active tenant groups, the Senior Management Team and Teign Housing's Board.

100% of all works valued over £1000 will be inspected by a Surveyor who will monitor the standard of the work. Customers receiving minor adaptations (e.g. grab rails) will be telephoned to ensure they are satisfied with the work carried out.

### **13.0 Review**

The policy and procedures will be reviewed after three years (or sooner if changes in legislation or other influencing factors occur, for example customer satisfaction survey results indicate that a review is required).

APPENDIX 1: PROCEDURE FLOW CHART

