

**Report of Jill Wildman, Chief Officer, Housing Leeds**

**Report to the Director of Environment and Housing**

**Date: 27 May 2016**

**Subject: Wharfedale View, Extra Care Scheme, Yeadon**

Are specific electoral Wards affected? If relevant, name(s) of Ward(s): Otley and Yeadon	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
Are there implications for equality and diversity and cohesion and integration?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
Is the decision eligible for Call-In?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
Does the report contain confidential or exempt information? If relevant, Access to Information Procedure Rule number: Appendix number:	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No

**Summary of main issues**

1. Construction of a 45 bedroom Extra Care scheme, Wharfedale View, Yeadon, has commenced and is expected to be completed in autumn 2016. The scheme will remain in LCC ownership with Housing Leeds providing the housing management service, sheltered housing service and Adult Social Care procuring the core care service.
2. This scheme is in support of the Council's Older People's Housing and Care Strategy, bringing together Adult Social Care, Environment and Housing and City Development to produce a co-ordinated response to the need for new Extra Care housing provision.
3. Wharfedale View is a flagship development for the Council in terms of design and signalling commitment to providing excellent quality accommodation for older people across a range of needs. The scheme will increase the variety, quality and number of specialist homes available, for shared ownership and for rent; support the supply of well-designed, affordable schemes; contribute to the development of new and innovative housing offers; improve supply across the wider market; improve joined-up working at a local level between Housing Leeds, Adult Social Care, health professionals and a care provider.
4. 10 of the apartments will be available to purchase through Older People's Shared Ownership with an equity stake of 75% being offered.

5. The proposed management, support and care arrangements for the scheme have been developed and are outlined within this report. This also includes proposals on the budget for the scheme.

### **Recommendations**

6. That the proposed management and care arrangements for the scheme are supported as outlined in this report.
7. That the proposed budget and charging arrangements are supported as outlined in this report.

## **1 Purpose of this report**

1.1 This report outlines proposals for the new Extra Care scheme, Wharfedale View, Yeadon which is due to open in autumn 2016 including:

- The Housing Management and Support Model
- The Care arrangements as being procured by Adult Social Care
- How the relationship will be managed to ensure an effective service
- The costs involved for tenants, shared owners and the Council.

## **2 Background information**

2.1 The provision of the scheme ties in closely with the Best Council Plan 2013-2017 by providing housing as the city grows and through supporting the delivery of the Better Lives programme - helping local people with care and support needs to enjoy better lives. With a focus on:

- helping people to stay living at home
- joining up health and social care services
- creating the right housing, care and support

2.2 The Council's Better Lives Programme established in 2011 aims to improve the lives of older people through its three key themes of integration, enterprise and specialist housing with care. Of particular relevance here is the strategy to support older people who wish to live in the community for longer by promoting choice in the way that their care is delivered. This has included a reduction in the number of LCC owned and operated residential care homes balanced by an increase in the supply of specialist housing for older people.

2.3 The LCC Adult Social Care Strategy - 'Better Lives for Older People' identified the need for approximately 900 units of Extra Care housing by 2020. As part of its role as an enabler in the housing market Leeds City Council will support the construction of an additional 1000 units of extra care housing by 2028 in areas of the city where there is known demand (latest data supplied in April 2015 by LCC Adult Social Care). The Leeds Vision for Extra Care Housing is to work with partners and provide resources to establish extra care homes in neighbourhoods with demonstrated demand and in doing so:

- support the health and well-being of older people who wish to live independently
- provide an alternative to residential care
- ensure that older people have a wider choice of housing and care options including the provision of person centred care and support
- increase the supply of specialist homes for older people that are for rent, shared ownership and for sale

2.4 To ensure that there is a co-ordinated approach towards provision of housing for older people, an Older People's Housing Strategy for Leeds has been developed. The objective of the strategy is to ensure that there is a mix of accommodation provided to meet needs and choice within tenures with provision for rent and

owner occupation. A key aim of the strategy is to meet a wide range of aspirations and needs across a variety of tenures and localised housing markets by ensuring a mix of public and private delivery. The emphasis of the strategy is provision of housing for over 75s, with a particular focus on extra care to address the projected shortfall in this accommodation type.

- 2.5 The Care Act (2014) has recently brought together previous legislation and put new duties and responsibilities on local authorities to improve older people's independence and well-being and prevent the need for increasing care and support. Wharfedale View will provide a range of activities and services which will help to enhance independence and promote and encourage well-being to those living in the scheme. There is the additional benefit of the scheme also being a 'meeting point' for other older people within the community who will be encouraged to attend events and participate in activities.
- 2.6 Wharfedale View will have 45 self-contained apartments (18 one bedroom and 27 two bedroom apartments). Each apartment will be self-contained with its own kitchen and wet floor shower room so that residents can live independently but with access to onsite 24/7 emergency support. Additional facilities include multi-use community rooms and restaurant which will be opened up for the local community of older people and friends and family of residents to use. A therapy area and assisted bathing suite will be provided in a spa setting for the use of residents. This is a fully accessible purpose built facility with parking for residents and visitors, mobility scooter store and cycle store. The garden area is fully accessible and raised planters have been included in the design to encourage an active role by residents in maintaining the gardens.
- 2.7 The on-site care is in the process of being commissioned by LCC Adult Social Care and will be provided by a domiciliary care provider that is registered with the Care Quality Commission and is rated as 'good'. The provider will have a 24/7 presence of care staff on site to provide support for unplanned care needs and emergencies.
- 2.8 Domestic support and personal assessed care will be available to purchase, usually provided by on-site staff depending on individual choice and can be adapted to reflect the changing needs of a resident over time.
- 2.9 Construction of Wharfedale View has commenced and completion is expected in autumn 2016. The site sits at the bottom of Yeadon High Street with good access to shops, banks and a doctor's surgery.
- 2.10 Wharfedale View will remain in LCC ownership with the Council providing housing management and support services in the normal way.
- 2.11 35 of the apartments will be for rent from the Council and 10 apartments will be for shared ownership. This is where a person buys a share of their home (for this scheme 75% of the home's value), the remaining share will stay in the ownership of the council.
- 2.12 A Service Specification has been developed and this is attached at Appendix 1.

### **3 Main issues**

3.1 This section outlines the proposed management arrangements for the scheme.

3.2.1 Housing Leeds will be responsible for:

- All housing management
- Housing related support/preventative and liaison services
- Property maintenance service
- Tenant and Resident involvement and participation
- Catering
- Facilities management and cleaning
- Environmental management
- Health and safety

3.2.2. The care provider will be responsible for:

- 24/7 presence of care staff on site to provide a core care service of support for unplanned care needs and emergencies
- Plus the option for a resident to opt to purchase additional services including:
  - domiciliary care
  - high level personal care

### **3.3 Proposed Management Arrangement for Wharfedale View**

#### **3.3.1 Role of Housing Leeds**

All residents will have a secure Tenancy Agreement with Leeds City Council.

Housing Leeds will retain responsibility for:

- Rent and service charge collection
- Ensuring the smooth running of facilities connected to the scheme
- Ensuring that the building is warm, safe and secure at all times
- Assisting with any tenancy issues

And will enter into a Service Level Agreement to provide the following services:

- Catering via Civic Enterprise Leeds (CEL)
- Cleaning/caretaking via CEL

#### **3.3.1i Staffing**

The full remit of proposed staff is included within the Service Specification at Appendix 1. To meet the Care Act (2014) responsibility to improve independence and well-being Housing Leeds proposes the following staff:

3.3.1ii 1.5FTE x C3 Housing Officers (Support) available from 9am to 5pm Monday to Friday plus to cover ad-hoc evening and weekend activities. These Officers would report to and be supported by an existing Team Leader within the Housing Leeds Older Persons Service (approximately 5 hours per week). The cost for this service equates to approximately £21 per week per tenancy.

- 3.3.1iii The Housing Officers (Support) will manage a Service Level Agreement with CEL for a Caretaker role (Grade A1, 30 or 37 hours per week). The cost for this service equates to approximately £7 per week per tenancy.
- 3.3.iv The Housing Officers (Support) will also manage a Service Level Agreement with Leeds City Council's in-house catering provider, CEL, to provide freshly cooked meals in a restaurant setting to residents living in a scheme as an alternative to them cooking their own meals in their own flats. Meals will be available 365 days of the year. Older members of the community will be encouraged to come into the Extra Care facility to use the restaurant as part of a 'Community Hub' ethos. Residents or older members of the community wishing to use the restaurant will pay CEL directly for this service.

### **3.3.2 Role of Adult Social Care**

Adult Social Care (ASC) are commissioning a 24/7 core care service to provide support for unplanned care needs and emergencies for Wharfedale View. This will be commissioned from a Care Quality Commission (CQC) registered provider (via a procurement process) and ensure that the Service Provider has the relevant appropriately skilled staff in place to commence when the scheme opens. Residents will be able to purchase an add-on service to deliver planned care and support as identified in their care plan from the commissioned core care provider or choose another provider if they so wish.

### **3.3.3 Role of Care Provider**

The commissioned care provider will be available on-site 24/7, 365 days a year to respond to emergencies but to also provide planned 'add-on' support such as assistance to get up on a morning, assist with personal care/washing/bathing, administration of medicine.

### **3.3.4 Working relationship between Housing Leeds and the Care Provider**

An important element to the schemes success will be the working relationship between Housing Leeds and the Care Provider who will meet on a regular basis to manage the scheme effectively and provide seamless support to residents, including close liaison on case management ensuring that any areas causing concern are identified and resolved as soon as possible.

## **3.4 Allocations**

- 3.4.1 The Allocations process is set out within the specification. The process includes for close joint working between ASC and Housing Leeds to ensure that best use is made of the housing stock and also ensure that those with the greatest needs are housed appropriately.

## **3.5 Rehousing and managing empty properties**

- 3.5.1 Empty properties will be let by Direct Let, if a resident has been assessed by ASC.
- 3.5.2 A void agreement is being developed with ASC to ensure appropriate and best use of council housing stock at Wharfedale View, this includes:

- Housing Leeds will hold a 'waiting list' of people who have been assessed and meet the eligibility criteria for the scheme
- Housing Leeds will proactively market the scheme if numbers on the waiting list are low
- ASC being notified within five working days of a void occurring.

### 3.6 Shared Ownership

- 3.6.1 One of the priorities of the funding was to increase the availability of housing for home ownership, the Council therefore committed in the bid to sell 10 of the apartments in the form of Older Peoples Shared Ownership (OPSO) - with an equity stake of 75% being offered. OPSO operates on shared ownership principles but with some differences from the regular product as it will only be available to people aged 55+, with the maximum level of equity which can be purchased being 75%. Shared owners acquiring a 75% equity stake, under the conditions of an OPSO lease, will not be required to pay rent on the remaining 25% which the housing provider owns. Shared owners will be responsible for paying the full contribution towards communal repairs and maintenance.
- 3.6.2 If the council fails to sell 10 apartments under an OPSO lease, they can be offered for rent. In this situation, the council would have to evidence to the HCA what attempts had been made to sell the properties.
- 3.6.3 Shared Owners will be required to pay a service charge for services provided to the communal areas of the scheme. This will be carried out in accordance with charging arrangements currently in place for leaseholders:
- Service Charges will be allocated pro-rata to the number of flats in the scheme;
  - A 'management fee' is charged to cover the Council's administration costs;
  - Service Charge is made on estimated basis annually in advance (issued April to March each year);
  - Charges will be collected quarterly, annually or by monthly direct debit/standing order or payment card to allow payment at Paypoint outlets, in advance;
  - Actual costs incurred and adjustments (under/over payment) made will be notified within 6 months of the financial year end.
- 3.6.4 A charge can only be made if mention of it is contained within the lease. The Council's Leasehold Flats lease provides that a management fee may be charged and that the Council may make such reasonable charge as it considers appropriate and work will be undertaken with Legal Services as to how prescriptive the terms of the lease are.
- 3.6.5 'Help to Buy' (part of Yorkshire Housing) have been appointed by the HCA for the North East, Yorkshire and Humberside to guide prospective shared owners through the options available and explain the eligibility and affordability criteria. The Housing Growth Team has appointed them to market the Shared ownership properties. Advertising the development/plots on their website (15,000 visitors a month) will commence in May 2016. The SLA includes:
- Targeting people listed on their database who have applied for Shared Ownership over a certain age and requiring a certain area.

- Advertising the scheme on Rightmove. (£60 inc VAT per plot)
- Advertising on the Help to Buy monthly buyers newsletter (8000 people)
- Undertaking an initial check on eligibility for shared ownership.

### **3.7 Financial Implications**

- 3.7.1 Asset Management have valued a one bedroom apartment at £135,000, excluding service charges and a two bedroom apartment at £160,000, excluding service charges.
- 3.7.2 Rent has been calculated on an 'affordable' rent basis (80% of market value) at £340pcm, excluding service charges for a one bedroom apartment and £420pcm, excluding service charges for a two bedroom apartment.
- 3.7.3 It is customary for a service charge to apply for communal services such as gardening, cleaning, communal gas and electric, replacement of communal furniture and carpeting, lift servicing, window cleaning etc. Service charges are payable by all residents; tenants and shared owners. The anticipated actual costs for running this new facility will be approximately £20 per week.
- 3.7.4 Prior to April 2015, there has been no service charge applied to sheltered schemes within Leeds. In April 2016, a nominal £2 per week service charge was introduced to all Housing Leeds properties with communal lighting and cleaning. It is proposed that for Wharfedale View, service charges will be charged at cost in order to be consistent with shared ownership costs. This service charge would be housing benefit eligible.
- 3.7.5 In addition, the cost for Housing Leeds staff to provide support to tenants and manage the building (see 3.3.1ii) equates to £21 per week, this also would be housing benefit eligible. It is proposed that this will be charged at cost in order to be consistent with shared ownership costs.
- 3.7.6 Many Extra Care providers require Shared Owners to contribute to a Sinking Fund (regular payments into a long term savings account towards any large cost communal / capital improvements or lifecycle replacements). The fund ensures that there is sufficient money available to carry out major capital works and safeguards the shared owner from receiving a large bill on completion of works. This is in addition to the service charge and any routine repairs and maintenance contributions. Based on key building components, their predicted lifecycle and the number of residents the sinking fund has been calculated at £23 per week (this is in addition to the weekly service charge). It is proposed the Shared Owners pay into a sinking fund.
- 3.7.7 All tenants, including Shared Owners, will pay the Core Care Costs (24/7 service to provide support for unplanned care needs and emergencies) which have been estimated at £45 per apartment per week and can be covered by Attendance Allowance. It is expected that all residents will be entitled to Attendance Allowance as it is not means tested.
- 3.7.8 In addition to this, as outlined in 3.2 above, it is proposed that the costs for any required 'add on' care package will be funded either from a personal budget or self-



funded. It is estimated that the weekly cost of planned care per apartment will be in the region of £102.78. Where there has been Adult Social Care engagement with an individual there would be a financial assessment to establish how much the person could contribute towards his or her cost of care, up to a maximum contribution of £375 per week which is means tested.

- 3.7.9 A number of other Extra Care providers make specific charges for facilities which not all tenants will use ie Mobility scooter store points @ £50 per year (5 spaces). These are not linked to service charges as not all tenants will benefit from the facilities and are not housing benefit eligible. It is proposed that scooter points are charged for.
- 3.7.10 Based on the above the likely cost for a tenant per week would be:
- Rent (1 bedroom) £ 78.50 (2 bedroom £96.90)
  - Staffing – Housing Leeds £ 21.00 (Housing Benefit eligible)
  - Service charge (estimated including cleaning) £ 27.00 (Housing Benefit eligible)
  - Maximum Core care cost £ 45.00
  - Average ‘Add on’ care £102.14
  - TOTAL 1 bedroom £273.64 dependent on actual care needs
  - (TOTAL 2 bedroom £292.04 dependent on actual care needs)
- 3.7.11 A shared owner would not pay any rent but would be responsible for arranging and paying for any repairs within their flat. They may also pay a mortgage on the share of the property they have purchased. In addition to the above a shared owner would also be required to contribute to a ‘sinking fund’ (regular payments into a long term savings account towards any large cost communal/capital improvements) calculated at £23 per week:
- Staffing – Housing Leeds £ 21.00 (Housing Benefit eligible)
  - Service charge (estimated including cleaning) £ 27.00 (Housing Benefit eligible)
  - Sinking fund £ 23.00
  - Maximum Core care cost £ 45.00
  - Average ‘Add on’ care £102.14
  - TOTAL £218.14 dependent on actual care needs
- 3.7.12 Provision of carpets within the communal areas has been included in the contract. However there is no current budget provision for furniture for the communal lounge, multi-use room, dining area, office, therapy suite, staff rest room, guest room and for window blinds. It is estimated that the cost for these items will be in the region of £45,000. Existing resources within the revenue budget will be realigned to cover this.
- 3.7.13 Marketing of the scheme and the shared ownership units is currently being planned but no budget is in place to assist with this. It is estimated that £10,000 would cover publicity material required including brochures, promotional postcards, a series of 6 large banners on site compound walls and ‘Rightmove’ adverts. Existing resources within the revenue budget will be realigned to cover this cost.

- 3.7.14 The specification for the Care Provider includes that there is a possibility of a charge for the use of office and rest room facilities to cover rent and the cost of utilities. The Office and staff facilities will be shared with Housing Leeds staff. Estimations for running costs of these areas have been calculated at £8,662 per annum (net of VAT). It is proposed to charge the Care Provider for  $\frac{3}{4}$  of this cost (based on Housing Leeds usage 25% of the time and the Care Provider, with their 24/7 cover, 75%), with a review on costs at the end of the first year of trading.

## **4 Corporate Considerations**

### **4.1 Consultation and Engagement**

- 4.1.1 A briefing has been arranged with Ward Members in April 2016 to explain the Service Specification and to discuss marketing of the scheme.
- 4.1.2 Early consultation has taken place with the local community to choose the name for the scheme, with 85 names put forward.
- 4.1.3 An 'open event' took place at Yeadon library in September 2015 to start promoting the benefits of Extra Care, further events will be organised in late spring and summer 2016.
- 4.1.4 A briefing has taken place at an Aireborough Voluntary Services to the Elderly with Disabilities (AVSED), the local neighbourhood network, service users meeting and they have requested a further briefing once the properties are marketed.
- 4.1.5 From the early consultation detailed above a list has been created of potential tenants and shared owners for the scheme.
- 4.1.6 A communication plan for the scheme is being developed.

### **4.2 Equality and Diversity / Cohesion and Integration**

- 4.2.1 The 'Vision for Leeds' is aimed at reducing the inequalities that still exists. In developing this new Extra Care scheme due consideration will be given to promote housing equality and the scheme will assist older people to live independently in the community.
- 4.2.2 The proposals contained within the report will have a positive impact on the wellbeing of older people as the new scheme will address social isolation issues and increase the opportunity for independent living.
- 4.2.3 The new scheme will meet key Leeds City Council equalities priorities. Specifically these will be to:
- Increase a sense of belonging that builds cohesive and harmonious communities
  - Ensure that housing and regeneration investment meets the changing needs of individuals and communities
  - Improve housing conditions and energy efficiency

- Support adults whose circumstances make them vulnerable to live safe and independent lives

4.3 The Equality and Diversity/Cohesion and Integration screening document has been completed to ensure due regard to equality issues. This is attached for reference at Appendix 2. The screening process found that it is a positive opportunity to promote the delivery of significant investment in improved, sustainable, specifically designed homes for older people. Support provided at the scheme also fits within the duties under the Care Act (2014) to improve older people's independence and well-being and prevent the need for increasing care and support.

#### **4.4 Council policies and Best Council Plan**

4.4.1 The proposals outlined within this report contribute towards the Best Council Plan 2015-20 priorities:

- Delivering the Better Lives programme
- Becoming a more efficient and enterprising council

4.4.2 The proposals also support one of the Council's key breakthrough projects of 'Making Leeds the best place to grow old'.

4.4.3 The details contained within this report will contribute to the following best city outcomes:

- Be safe and feel safe
- Enjoy happy healthy and active lives
- Live with dignity and stay independent for as long as possible
- Live in decent, affordable homes within clean and well cared for places

#### **4.5 Resources and value for money**

4.5.1 Research demonstrates that extra care is effective in reducing the amount of care or delaying an increase in care combined with an improvement in individual wellbeing. Research indicates that access to extra care housing has a positive impact on health and social care services costs, providing value for money benefits as well as an improvement in quality of life for the city's older people. The delivery of additional housing units specifically for older people can also assist in freeing up larger family homes by encouraging downsizing and facilitate a more effective use of the existing housing stock.

4.5.2 In relation to the cost of Residential Care, Extra Care can be seen as a viable alternative. Costs paid by Leeds City Council for residential care range from £411 to £468 per person per week for a 'core' service. For Wharfedale View the expected cost for a 1 bedroom apartment with 'core' care and 'average' add-on care is £273.54.

4.5.3 The Core Care Procurement exercise is not yet concluded but the provider likely to be appointed quoted £45.12 in their tender for 'core care'. Assisi Place, Hunslet run by Methodist Homes is a like-for-like site with 45 apartments. Their core care cost is currently £53.94 per apartment per week.

- 4.5.4 In terms of service charges the comparison information held by ASC is from 2012 and it is likely that service charges will have risen since then. However, even at 2012 prices it shows Wharfedale View costs as favourable at £48 per apartment per week:
- Rosewood Court, Moortown (Methodist Homes) - £58.13
  - Rossefield Manor, Bramley (Hanover) - £49.35

#### **4.6 Legal Implications, Access to Information and Call In**

- 4.6.1 The Care Act (2014) has brought together previous legislation and put new duties and responsibilities on local authorities to improve older people's independence and well-being and prevent the need for increasing care and support.
- 4.6.2 The proposals contained within this report are not eligible for call in.
- 4.6.3 There is no exempt or confidential information contained in this report.

#### **4.7 Risk Management**

- 4.7.1 There is a risk of not selling all shared ownership properties, however, if the Council could demonstrate to the HCA that it had made appropriate attempts to sell the properties they could be offered for rent.

### **5 Conclusions**

- 5.1 It is essential that older people have access to a range of housing options appropriate to their stage in life and level of dependency.
- 5.2 This scheme is in support of the Council's Older People's Housing and Care Strategy and brings together a co-ordinated response between Adult Social Care, Environment and Housing and City Development for Extra Care housing provision for older people.
- 5.3 Wharfedale View is a flagship development for the Council in terms of design and signalling commitment to providing excellent quality accommodation for older people across a range of needs. The scheme will increase the variety, quality and number of specialist homes available, including for sale or shared ownership; support the supply of well-designed, affordable schemes; contribute to the development of new and innovative housing offers; improve supply across the wider market; improve joined-up working at a local level between Housing Leeds, Adult Social Care, health professionals and a care provider.
- 5.4 Wharfedale View will have 45 self-contained apartments so that tenants and residents can live independently but with access to onsite 24/7 emergency support. Additional facilities include multi-use community rooms and restaurant which will be opened up for the local community of older people and friends and family of residents to use and a therapy area and assisted bathing suite.
- 5.5 The scheme will remain in LCC ownership with the Council providing housing management and support services with the on-site care provision being procured through Adult Social Care.

## **6 Recommendations**

- 6.1 That the proposed management and care arrangements for the scheme are supported as outlined in this report.
- 6.2 That the proposed budget and charging arrangements are supported as outlined in this report.

## **7 Background documents<sup>1</sup>**

---

<sup>1</sup> The background documents listed in this section are available to download from the Council's website, unless they contain confidential or exempt information. The list of background documents does not include published works.