

# SCRUTINY

## **REPORT OF THE DISABLED FACILITIES GRANTS TASK AND FINISH GROUP**

**DATE: November 2010**

## Acknowledgements

### Working Group

Councillor Anne Cheetham (Chair)  
Councillor Gladys Sandiford  
Councillor Granville Morris  
Councillor Amanda Robertson  
Councillor Dorothy Farrington

### Scrutiny Support Officer

The Task and Finish Group thanked Pat Couch, Scrutiny Support Officer for producing the report.

### Officer Support

The Task and Finish Group would like to thank the following Officers for their contributions:

Rebecca Lawlor Health and Regeneration Manager  
Phil Hollows, Housing Renewal Manager

### Contribution of Evidence

The Task and Finish Group would like to thank the following people for their contributions during this piece of work:

Chris Roberts, Homecare and Repair Manager  
Steve Nutter, Project Officer (Grants), Burnley Borough Council  
Susan Warburton, Rossendale Lead Commissioning Officer, Primary Care Trust  
Amanda Cook, Occupational Therapist, Rossendale Area  
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Lancashire County Council

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## GLOSSARY OF TERMS

**DFG** – Disabled Facilities Grants  
**OT** – Occupational Therapist  
**LCC** – Lancashire County Council  
**HIA** – Home Improvement Agency  
**RSL** – Registered Social Landlord  
**PCT** – Primary Care Trust

**Local Land Charges** – A financial charge or restriction placed on a land or property where the Local Authority can recover money owed to it.

**Top-up Funding** – Where aids and adaptations are above the mandatory grant of £30,000 discretionary top-up funding may be available from Social Services where the applicant is considered a genuine hardship case.

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## LIST OF THE TASK AND FINISH GROUP RECOMMENDATIONS

The Task and Finish Group have made a number of recommendations which could have budget implications. Members understand that not all are likely to be achieved in light of the Comprehensive Spending Review, but would make the following recommendations.

### Recommendation 1

It would be beneficial if the OT provided the Council with an update on those adaptations under £500 to enable them to keep an audit of all applications.

### Recommendation 2

That the Council considers placing a local land charge on properties which receive grants over £10,000 from April 2011, similar to the system in place that Lancashire County Council use for top up funding.

### Recommendation 3

The Group recommend that the Council request a joint leaflet be produced to include information on the process of DFGs from a Council and OT perspective, which should include sources of financial help and advice to assist people struggling to fund their own contribution to the building work including credit unions.

### Recommendation 4 – PRIORITY RECOMMENDATION

Members felt that there would be more merit to having a Home Improvement Agency based on a local footprint, rather than a County footprint.

### Recommendation 5

It is important that there is a defined policy to allow for a specific amount of money to be spent on urgent/non urgent cases eg 25% of the available funding specifically for non urgent cases to help reduce this element of the waiting list.

### Recommendation 6

Lancashire County Council needs to provide a clear statement about what they are going to do about the following:

- a) Provision for top-up funding for Registered Social Landlord properties
- b) Transition process for carer/family and the impact on them
- c) Clear intention about what they intend to do about recycling equipment, such as track hoist/stairlifts, in circumstances such as death or redundant equipment (no longer needed) so families, owners and carers are aware of the policy.

### Recommendation 7

The Council need to ensure that local MPs are kept informed of waiting times for Disabled Facilities Grants, the total costs of those aids and adaptations on the waiting lists, the procedure for applying for these grants, to enable them to inform their constituents.

### Recommendation: 8

That Cabinet/Lancashire County Council consider this report and its recommendations and respond to the Overview and Scrutiny Management Committee, indicating what action is proposed within two months.

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## 1. Purpose of the Report

The Working Group was set up in order to look at the Disabled Facilities Grants process and how it works in Rossendale. The Group also sought information on St Vincent's Homecare and Repair, which is part of St Vincent's Housing Association. Members wished to understand the process of allocation of Grants and to assess its transparency and fairness.

This process has recently been tested by two members of the Task and Finish Group and was found to be an extremely valuable service and lived up to the ethos of the Association.

## 2. Background

A Disabled Facilities Grant is for someone who is living in a property and is disabled. The Grant would help towards the cost of adapting their home or providing facilities to help a disabled person to live more independently within the home. The maximum grant available is £30,000.

The Council provides financial support to the Home Improvement Agency and its contract with Lancashire County Council is due to end on **31 March 2011**. Therefore, it was agreed to look at the service to ensure it provides a value for money service and to inform Lancashire County Council of its findings prior to them making their decision on future contracts at the end of March.

The Group met five times between July and October 2010 and made a site visit to the offices of St Vincent's Homecare and Repair Service in Haslingden.

There is an agreed lower limit of £500 for Disabled Facilities Grants. Any cases below £500 will be dealt with as minor adaptations usually through the local Home Improvement Agency (for Rossendale this is St Vincent's Homecare and Repair Service).

## 3. Terms of Reference of the Group

The overall Terms of Reference of the Group were:-

- To examine the processes involved in allocating a Disabled Facilities Grant
- To assess the level of demand, referral system, eligibility criteria and means testing process
- To examine the adequacy of the current Disabled Facilities Grant budget, use of available funding and current policy
- To examine the length of wait for urgent and non urgent Disabled Facilities Grant
- To undertake a site visit to the St Vincent's Homecare Service with the possibility of looking first hand at some of the work undertaken

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- To invite representatives from other agencies ie Lancashire County Council or the Primary Care Trust (PCT)
- To make recommendations as appropriate to be included as part of the Private Sector Housing Strategy

**4. Developing common, cross-agency standards and criteria, policies, procedure and protocols** - Burnley, Pendle and Rossendale Councils operate under the same Social Services Directorate and for the benefit of all service users it is important that those Councils deliver adaptations in a broadly similar way. The Council has worked with its partners at Pendle and Burnley to map out adaptations processes, roles, and budgets. Most processes in each Council follow a similar route to the delivery of the adaptation.

**5. Form of Investigation**

In carrying out its review, the Task and Finish Group examined the referral system, eligibility criteria and means testing process when applying for a DFG

At this initial scoping meeting it was agreed that the Task and Finish Group would undertake a visit to St Vincent’s Homecare and Repair Service.

The Group also invited a representative from Burnley Borough Council, Occupational Therapist Service, the Primary Care Trust and Lancashire County Council.

**6. What is a Disabled Facilities Grant (DFG)?**

A DFG is for someone living in a property who is disabled. This is to help towards the cost of adapting their home or providing facilities to help the disabled person to live more independently within the home. The maximum grant available is £30,000.

**Who is eligible for a DFG?**

- Someone who is disabled and lives in their own home or are a tenant, including a Housing Association tenant, can apply for a grant.
- Someone who is a parent or guardian of a disabled child (under 19) then they can apply for a grant.
- Someone who has a disabled person living with them and they are an owner-occupier or a tenant can apply for a grant on behalf of the disabled person.
- If a landlord has a disabled tenant, then he/she may apply for a grant on behalf of that tenant.

In all cases, the adaptation must be necessary and appropriate and the design and condition of the property must be such that the adaptation is reasonable and practicable. If it is not deemed reasonable and practicable by Rossendale Borough Council, then the Council may, at its discretion, award a grant of up to

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£3,000 to assist with the expenses incurred in moving to a more suitable home in addition to any adaptations required.

All adaptations for DFGs are subject to a means test, except those involving children. This means the Council will need to look at the applicant's income and expenditure.

## 6.1 Application Process

### Process for applying for a DFG (case studies attached at Appendix A)

Following an initial enquiry, applicants are informed of the process by telephone and then directed to Lancashire County Council Social Services Customer Care Team, where they are asked brief questions before being forwarded to Occupational Therapy.

The Occupational Therapist (OT) contacts the applicant direct. At this stage the Council is not part of the process, as any adaptation under £500 is referred to the Home Improvement Agency.

#### **Recommendation 1**

It would be beneficial if the OT provided the Council with an update on those adaptations under £500 to enable them to keep an audit of all applications.

The OT would then visit the applicant and make recommendations, they would then prioritise as either 'urgent' or 'non-urgent'. The information would then be fed back to Social Services who endorse the recommendations. This information is then sent electronically from Social Services to the Council to enable them to be put on the appropriate list (urgent or non-urgent).

The Council then write to the applicant, who is given the opportunity to have a means test carried out at an early stage, rather than wait for a long period of time and be told that they were not eligible.

The Council is at the moment only dealing with urgent cases. They visit the property to look at what the OT is recommending, to ensure it is 'reasonable and practicable'.

An Officer will go through the grant procedure (in-house agency provides this support). A schedule of work is produced to go out to tender, with a minimum of two contractors pricing up for the work - there is a recognised list of contractors who do the required types of work. Rossendale Council have their own prices for schedules of work and they cost the job based on Council prices and depending on the lowest price they approve the grant.

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The Council charge a fee of £350 plus VAT or 10% of contractor costs, whichever is greater for overseeing the work and managing the administration and tendering element of the installation process. For smaller adaptations ie stair lifts, the cost is £250 or 5% whichever is greater.

Grant approvals are signed by the Housing Renewal Manager, sending a copy to the applicant and an email copy to Social Services.

If the cost of the work exceeds the maximum grant, the applicant is advised of their right to apply to Social Services for top-up funding. If a top-up is needed the contractor is informed not to arrange a start date until the outcome of the success of a top-up is known.

Once work has started the Council monitor progress. A final inspection of the work is carried out and once satisfied that the work is completed they are issued with a final certificate and requisition for payment. Everyone involved is notified when the work has been completed and the applicant is sent a satisfaction questionnaire.

Rossendale Borough Council has a database of all homes that have been adapted so that a person on the housing list can be transferred to that property when/if it becomes available.

## 6.2 Means Testing

Mandatory and discretionary DFGs for adults (but not for children) are means tested, with the exception of those on Income Support or guaranteed Pension Credit etc (these people and children under 19 years of age are pass ported through the system). This means that the grant applicant may be required to make a contribution towards the cost of adapting their home. The Council has no discretion in the application of the means test, nor its outcome.

In order to calculate how much the grant applicant has to pay towards the cost of the adaptation, details will be required on the disabled person's income, savings, assets and benefits. The first £6,000 of savings is ignored. All information is input electronically and would produce an 'affordable loan' based on the financial information given – 100%, part or nil grant.

If the applicant does not qualify for a grant they are directed to Social Services, who have their own means-tested process which takes more details into account.

The contribution the applicant is asked to pay may be anything from a few hundred pounds to the total cost of the work. At the present time the Council does not put charges on properties for any grants given, unlike Lancashire County Council who put charges on a property for top-up funding on a sliding scale.

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There are a number of organisations that can provide financial advice and/or assistance to applicants including the British Legion.

Disabled Facilities Grants are registerable as Local Land Charges. The Council could set up an internal mechanism whereby they are notified of the Grants when they are completed and they can then register a charge in Part 4 of the Local Land Charges Register. If the properties concerned are sold, then the existence of the charges would be picked up before the sale is completed. The only cost to the Council would be Officer time.

#### **Recommendation 2**

That the Council considers placing a local land charge on properties which receive grants over £10,000 from April 2011, similar to the system in place that Lancashire County Council use for top up funding.

### **6.3 Publications/information available to the public**

St Vincent's Homecare and Repair Service provides clients with a welcome pack providing details of their service, including relevant information on the different levels of service they provide, useful contact details and how to make a complaint. They also offer the information in large print or Braille.

Whilst the Council have information available on their website, the Group heard that this was in the process of being revised as it was out of date.

Members agreed that it would be beneficial if one corporate leaflet was published which included information on how to seek financial support if people were unable to contribute themselves to the building work

#### **Recommendation 3**

The Group recommend that the Council request a joint leaflet be produced to include information on the process of DFGs from a Council and OT perspective, which should include sources of financial help and advice to assist people struggling to fund their own contribution to the building work.

## **7. St Vincent's Homecare and Repair Service**

The service is a locally based not-for-profit organisation which helps homeowners and private sector tenants who are older, disabled or on low income.

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All the Homecare staff are based in offices in Haslingden, which has extensive cellar storage on site for materials and equipment. The following services are provided.

**Handyperson Service** is provided for small repairs and improvements which take 2 hours or less to complete. This covers most trades except electrics and gas.

The Agency charge is £10 per hour.

### **Core Services (using private contractors) – offered at 2 levels**

**Basic Service** - A job is allocated to a selected contractor, all of which are carefully monitored and vetted re insurance, references etc. St Vincent's do not give applicants a list of contractors, as they ring and sort out jobs to be undertaken on behalf of the client. Letters are then sent to the client and the contractor makes contact and provides a quote. If the quote is accepted the job is completed and the client pays the contractor.

**Full Service (for larger or complicated jobs)** - A Technical Officer prepares a full specification and quotes are invited from 3 contractors on St Vincent's list and the cheapest quote is normally accepted (if a charity is involved), although the final choice is with the client.

The job is monitored through to completion and a Caseworker will try to raise funding through charities if the client needs help. St Vincent's charge 5% of the costs of the full service.

In 2009/10 St Vincent's accepted 227 core service jobs in Rossendale.

**Minor Adaptations** under £500 are ordered without recourse to DFG and issued to St Vincent's.

Minor adaptations under £500 are sub-divided into non structural, which should take 8 days to complete and structural, which could take up to one calendar month to complete.

The number of jobs completed this year up to end June 2010 was 417 non structural and 120 structural.

#### **Recommendation 4**

Members felt that there would be more merit to having a Home Improvement Agency based on a local footprint, rather than a County footprint.

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## 8. Discussion with Neighbouring Authority on the Process of DFGs

Steve Nutter, Project Officer at Burnley Borough Council, informed the Group that they had a review of their Grants procedure 5 years ago. They had been asked to come up with a financial solution and a 5 year plan based on the number of urgent and non-urgent referrals and how they would reduce the waiting list over a 5 year period. The bid was presented to Government Office North West.

Increase of funding was the main solution in reducing the non-urgent waiting list which has now reduced to 16 compared with 150 five years ago. They achieved this through keeping the cost of work down and through the tendering process. They managed to get 10-12 contractors who were very competitive and who competed for the work. Over the last 5 years they had experienced a good reduction in the cost of work. They had also introduced a simplistic Code of Conduct for Contractors.

Contractors are checked for public liability, references and evidence that previous work undertaken is of a high standard. The Technical Officers had built up a good relationship with contractors and would work with them and explain why they had not got a contract (if that is the case), and they would also share information on better deals from suppliers of materials.

They were continuing to work with contractors to ensure guarantees (e.g. for showers, etc), were passed on to the customer, and help would be provided in completing the guarantee and posting it off.

Occupational Therapy decide what is **urgent** or **non-urgent**. Burnley receives £1.3 million for a population of 85,000. This includes £½ million contribution from the Council to clear the backlog.

## 9. Budget Information

The Annual budget for Disabled Facilities Grants is £353,000 from the Housing Department making an overall budget of £500,000. This can vary from year to year based on reported spend and available budget.

The maximum available grant per application has recently been increased from £25,000 to £30,000. Any grant payable over this amount is at the discretion of the individual Council.

Rosendale received £353,000 and money from the Housing Department budget is added into this for an overall budget of £½ million. This means that the Council is constantly dealing with urgent cases and only touching non-urgent if there is money available in the budget at the end of the year.

On average the Council gets 12-14 referrals a month which can be for large or small grants. At present work waiting to be done is estimated at £1.3 million.

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**Spend in the last three years to date is set out below.**

Grant allocations from Government, RBCs contribution through Housing Capital Pot and total actual spend.

**2007/8** = Government Grant **£213k** and LA Contribution **£250k**  
**= total spend was 463k**

**2008/9** = Government Grant **£294k** and LA Contribution **£335k**  
**= total spend was £649k** (overspent)

**2009/10** = Government Grant **£353k** and LA Contribution **£160k** (increased in December 2009 to £347k)  
**= total spend £539k** (overspent)

**2010/11** = Government Grant £353k and LA Contribution **£147k**  
**= spend to date £320k**

There were 160 on the waiting list and only 5 urgent cases had yet to be inspected with a further 35 urgent cases at various stages ie awaiting planning approval/top up funding/out to tender. The approximate value of these 35 is in the region of £470k. Eight urgent cases are ready for approval but waiting funding, the cost of these were £30k. Waiting time for non urgent referrals was approximately 3 years.

**Recommendation 5**

It is important that there is a defined policy to allow for a specific amount of money to be spent on urgent/non urgent cases eg 25% of the available funding specifically for non urgent cases to help reduce this waiting list.

It was noted that the cost of providing adapted facilities for a disabled person can vary considerably due to the specialist nature of the equipment needed, the limited number of specialist suppliers available and the limited choice of manufacturers supplying the equipment. However, at times when efficiency savings are paramount, there is a need to achieve value for money by ensuring that contractors are providing such a service.

The Officer with overall responsibility for grants within the Council keeps detailed records of budget commitment as well as actual spend in order to ensure that the budget allocation was fully spent each year.

As part of the Stock Transfer agreement, Greenvale Homes agreed to fund DFGs over 5 years to the amount of £1.25m, this includes the cost of

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employing an Occupational Therapist specifically to assess Greenvale Homes tenants and to carry out other associated works on their properties as they see fit.

Disabled Facilities Grants carried out on Greenvale Homes and totally funded by them.

Completed from April 2008 to March 2009 =38 at a cost of **£169K**.

Completed from April 2009 to March 2010 = 50 at a cost of **£188k**

Completed from April 2010 to October 2010 = 33 at a cost of **£107k** (a further 16 jobs are in progress at a cost of **£49K**)

*This funding for Green Vale Homes tenants ends in March 2011 on completion of the Stock Transfer Agreement.*

## 10. Occupational Therapy Applications (including Green Vale Homes)

Dates	Recommendations Received	Applications Approved	Applications Completed
April 2007 – March 2008	136	72	78
April 2008 – March 2009	158	95	101
April 2009 – March 2010	172	73	76
April 2010 – July 2010	57	30	10

The Group met with Amanda Cook, Advanced Occupational Therapist from Rossendale Locality Team. She gave a brief overview of her role

OTs work closely with the Private Sector Renewal Officer when discussing adaptations for individuals. They undertake joint visits to decide if any adaptation is possible at a particular property for an individual, or it may be to decide which scheme will work best for the particular client. This works very well as they look at the same problems from different angles. Together they both review architects plans that are drawn up for proposed adaptations.

There are 6 weekly joint meetings between RBC/LCC/SS to review cases and to find out which adaptations had been completed. OT services will undertake check visits of adaptations that they have been involved in.

The OT also assists the Council with prioritising waiting lists for DFGs Each case is discussed at the 6 weekly meeting and their case would be made either non urgent or urgent. This can be reviewed if there are significant functional changes in an individual's circumstances and OT will revisit if necessary.

## 11. Lancashire County Council

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There was a presentation from Brian Robinson. Integrated Provision - Specific Needs East Lancashire, who was one of three Service Managers covering the County, but based at Chaddesley House in Burnley.

He had responsibility for assessments in Lancashire covering paediatrics via a Service Level Agreement with Occupational Therapists.

Due to young people no longer means tested, this has resulted in an increase in DFGs across the County. Any DFG beyond the £30,000 limit is the responsibility of the parent and discussion was ongoing on how this information was passed on to the parent. The applicant needs to prove 2 loan refusals from either bank/building society before a top-up is given.

The County has given £800,000 in top-up over the year and this has risen from £200,000, 8 months ago. The average cost of paediatric DFGs was £54,000.

If a family chose to move home and had received a top-up, there was a claw-back facility on a sliding scale up to 10 years. If specialist equipment had been put into the house, this would be taken back.

## Equipment

There were 2 elements to equipment

- a) Specials – nearly all paediatric was special
- b) Adults – no longer collect equipment under £100

The PCT and LCC were looking at having one loan store across the County, presently there are five, one each on PCT footprint, 2 in North and 1 education loan store. There was discussion on how having one community loan store would work in relation to the delivery of equipment. The County are looking at providing a delivery service along the lines of Millercare.

East Lancs was part of a Department of Health project in which it was highlighted that it was not cost-effective to collect equipment back and cleaned before being sent back out.

## Transition

Across the County the transition's process for young people moving from children's to adult services has been poor. This has been recognised as a national issue and is part of the Aiming High for Disabled children agenda. There is a national Transitions Support programme which LCC and the PCT have been working with and been monitored against.

Performance has been improving and has structures are now being put in place to smooth the process of transitions for young people. One of the challenges is that transition happens at different times for different services which cause

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confusion and uncertainty for young people and their families. The aim is to improve information available to this group to enable them to have informed choices and ensure that transition goes as smoothly as possible.

#### **Recommendation 6**

Lancashire County Council need to provide a clear statement about what they are going to do about the following:

- a) Provision for top-up funding for Registered Social Landlord properties
- b) Transition process for carer/family and the impact on them
- c) Clear intention about what they intend to do about recycling equipment, such as track hoist/stairlifts, in circumstances such as death or redundant equipment (no longer needed) so families, owners and carers are aware of the policy.

#### **Recommendation 7**

The Council need to ensure that local MPs are kept informed of waiting times for Disabled Facilities Grants, the total costs of those aids and adaptations on the waiting lists and the procedure for applying for these grants, to enable them to inform their constituents.

#### **Recommendation 8**

That Cabinet/Lancashire County Council consider this report and its recommendations and respond to the Overview and Scrutiny Management Committee, indicating what action is proposed within two months.

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## APPENDIX A

### Case Study: Disabled Facility Grant (DFG)

#### Case 1

In 2001, Mr and Mrs D lived in a Semi detached 3 bedroom property with 2 children, the youngest child at that time was 7 years old and required constant care and supervision.

It was felt by the Occupational Therapist that the size of the property would be too small for a growing family and particularly for the needs of Miss D.

A reasonable size garden was located to the rear of the property, ideal for a ground floor bedroom and bathroom facilities for use by the 7 year old child.

Meetings followed between the family, Occupational Therapist, Architect and the Council's Technical officer and eventually plans were agreed by all parties and submitted for building regulation and planning approval.

The technical officer helped Mr and Mrs D complete all the necessary forms required for a full DFG application, a schedule of works was prepared based on the approved plans and two quotes obtained.

The best price for the works was £27,153.00, however, the maximum grant at that time was £19,188.00 so Lancashire County Council had to be approached to make up the £ 7,965.00 short fall. Eventually funding was secured and works started. The extension was completed later in 2001.

Following the break up of the marriage between Mr and Mrs D, the adapted property was sold and Mrs D and disabled child moved to a new property.

A new recommendation from the O/T was made on this property, comprising of ground floor bedroom and bathroom facilities. Once again, a great deal of time and work went in to the design of the extension as gaining planning permission proved challenging. In July 2009 the grant was approval and a request for top up funding sent to LCC. Total cost of works was £ 30,000.00.

Before any works commenced on site, Mrs D informed us that she no longer felt that the child's main place of residence should be with her but instead be with her father. A new recommendation was made and the process begun again but this time on the home of Mr D, plans prepared and passed quotations obtained and top up funding approved by LCC. Works commenced in April 2010 and completed August 2010. The total cost was £ 45,700.00 of which £28,335.00 was grant aid and the remainder funded by LCC.

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## **Case 2**

Mr and Mrs M live in a small bungalow and have done so for a number of years. Mr M's mobility is steadily getting worse and it is expected that he will become wheelchair dependant shortly. Mrs M provides the care for him.

The O/T, technical officer and Mr and Mrs M discussed a number of options including moving to a more suitable property for adapting as the extent of works to the existing property would mean that Mr and Mrs M could not live in during works in progress.

Moving was seen as not an option as relationships had developed over the years with neighbours, the area was quiet and cost of moving would be a problem.

It was agreed that the existing bungalow be adapted to suit Mr Ms future needs so to avoid additional costs and upset for a second time later on.

An architect was then brought in and the brief given to him as discussed and agreed at the earlier meetings. The works involved kitchen redesign, level access shower, widening doorways, new doorway and ramping.

Plans had to be passed and quotations obtained, arrangements made for temporary accommodation and the storing of furniture.

Works started in March 2010 and completed in July 2010. The total cost and grant given was £ 21, 716.25

## **Case 3**

Mr K is 67 years old and is unsteady on his feet but gets about at his own pace. A visit was made by the OT and a recommendation made for grab rails throughout the house including the bathroom and a small handrail outside the house. This work was under £500.00 and so was given to St Vincent's Home care and Repair team via Social Services who have a contract with St Vincent's to undertake minor adaptations. (under £500.00) A stair lift was also recommended and a price obtained from a specialist company contracted by LCC. This was a reconditioned stair lift at a cost of £545.00

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