

# Sunderland – local authority trading company

## Good practice themes

- 1. Comprehensive range of discretionary services through Regulatory Reform Order**
- 2. Procurement of specialist equipment**

## Context

Sunderland City Council (pop. c.280,000) is a metropolitan district council, one of five in Tyne and Wear.

The prevailing levels of long term limiting illness is significantly higher in Sunderland than the average for England. In addition the city's Housing Strategy published in 2017 states that the population of people over 65 is predicted to increase by 42% between 2015 and 2039.

There has been a longstanding recognition in Sunderland City Council that the accessibility and quality of the local housing stock is a significant contributor to health and care outcomes and hence there is a focus on prevention and early intervention to provide positive cost effective options.

In December 2013 Sunderland established an arms-length trading company for many care and support services. Sunderland Care and Support Ltd works in all housing tenures. The organisation employ more than 1,400 staff across a wide range of social care functions including wellbeing and community resource centres, short break services, supported living, re-ablement and intermediate care. It also includes the home improvement agency (HIA) which brings together the delivery of adaptations, equipment and telecare under one manager.

Occupational therapists are not based within the HIA but are located in the same building and communication and joint working arrangements are considered to be effective in service delivery. The HIA has links to energy advice, general advice and information, handyperson service and financial advice so adopts a holistic view of identifying and meeting needs beyond the provision of adaptations which they directly administer.

# 1. Comprehensive service through the adopted Regulatory Reform Order

Sunderland City Council has a long history of working flexibly to meet the housing and related needs of disabled people and was probably the first in England to introduce grant assistance for home adaptations that did not involve means testing. The threshold grant limit was originally set at £4,000 but has recently increased to £8,000.

This was assessed as a cost effective measure e.g. in terms of efficiency savings as very few DFG cases involve a means tested contribution even though over 800 grant aided major adaptations are completed annually across all housing tenures.

The HIA has traditionally also used a network of reliable local contractors for general building work within the adaptations programme as the contractors are popular with service users, costs are very competitive and DFG expenditure is then recycled into the local community.

All works below £5,000 are pre-priced by HIA surveyors and go to the next contractor on the list on rotation without the need to tender works individually.

Relationships between the HIA and Gentoo (the largest social landlord which took over the local authority stock in 2001) are well established and Gentoo have for many years provided funding from their own resources towards the adaptations capital programme. All level access showers in Gentoo stock go to the council's Direct Labour Organisation without the need to tender individually.

The current Financial Assistance Policy setting out the various home adaptation provisions operated on behalf of the local authority was introduced in April 2017 and will run until March 2020.

In summary the main services consists of the following elements:

- **Non-means tested adaptations assistance grant** – up to £8,000 with applicants only needing to make a declaration that they do not have savings above £25,000
- **Non-means tested grant for service users in palliative circumstances** – up to £8,000 and not means tested
- **Care needs grant** – for works that do not necessarily qualify for Disabled facilities grant and focuses on where an adaptation is required to enable the carer to care rather than directly addressing the needs of the disabled person. Means testing only applies apply for works above £8,000
- **Top up assistance** – ordinarily up to £10,000 as a grant, loan (or a mixture of the two) dependent on individual financial circumstances. For tenants it would always be a grant
- **Relocation grant** – up to £1,000 for cases involving tenants where an older person wishes to downsize or their existing home cannot be adapted to meet existing or longer term needs.
- **Relocation equity loan** – used to support people to move between owner occupied properties.

## Outcomes for service users

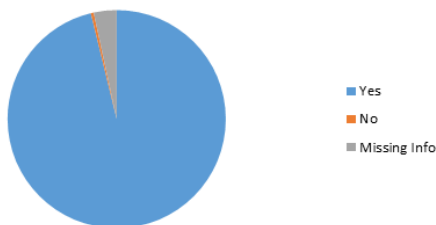
Removing formal means testing and instead relying on the applicant making a simple self-declaration regarding their financial circumstances has radically reduced the administration associated with full means testing and hence speeded up grant approvals. It has also, in comparison to previous years, reduced the number of cancelled grant enquiries arising from the householder being unable to fund the means tested contribution.

In terms of capturing outcomes from services rather than the usual approach of undertaking the customer satisfaction survey at the point of works being completed the HIA now sends out the feedback form three months after this date to better indicate an evaluation in use. In addition to the usual questions on the process of assessing need and delivering the home adaptations it also includes questions about whether the adaptations have helped service users with regard to:

- their ability to undertake tasks of day to day living
- remaining in their current home
- improved health outcomes
- reduced the risk of falls
- increased perceptions of confidence, safety and independence in the home

Results are shown below

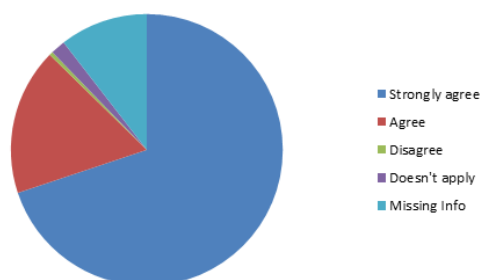
### Do you feel the work of the HIA has improved your day to day living?



### How do you rate the the work of the HIA has it made you feel less at risk of falls?



### How would you rate the work of the HIA has it increased your level of independence?



## 2. Procurement of specialist equipment and adaptations

Sunderland City Council was pioneering in its approach to procuring equipment establishing its first block contract for installation of straight stair lifts in 2000.

Since that date and, particularly after the service was transferred to the home improvement agency, a range of framework contracts have been developed for provision of curved stair lifts, through floor lifts, ceiling track hoists and pre-fabricated ramps. In 2018 these contracts are due for renewal and built ramps will be included in the scope.

Each contract is being designed to achieve best value by ensuring suppliers;

- 'freeze' the warranty for fixed mechanical equipment if no longer needed within the warranty period until that equipment is relocated
- supply and maintain demonstration equipment located within the HIA building and used by occupational therapists for assessment purposes

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