

## South Derbyshire District Council

### Options Appraisal – Sheltered Housing Schemes

Presented by  
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## Introduction

This options appraisal report was commissioned by South Derbyshire District Council and carried out by Pennington Consulting and Support as part of its interim management support for the Council's housing service. The objective of the study was to provide the Council with information to enable it to consider the future of three sheltered schemes that have a number of long term voids<sup>1</sup> that it has been unable to let.

The Council previously carried out a Sheltered Housing Best Value Review which received a 'no star and unlikely to improve' rating by the Audit Commission, based on perceived inconsistency of service and generally poor physical standards in some schemes. The Council has an action plan to ensure improvements to its properties, and in particular to address the issues of some long term vacants in sheltered schemes that are a drain on resources, and this options appraisal is part of the action planning process.

Along with other Councils, South Derbyshire District Council has to implement Rent Restructuring from April 2003, to ensure convergence between Council and RSL rents by 2012, based on a formula set out within the guidance. The assessed impact of this for South Derbyshire District Council is generally to reduce rents for flats and to increase rents for houses, thereby reducing rent to be achieved by sheltered housing in the long term. However, the New Financial Framework for Local Authority Housing: Resource Accounting and Housing Revenue Account consultation paper (June 2002) provides the ability for Councils to consider charging new tenants, and existing tenants subject to consultation, a more cost based service charge and support charge from April 2003.

The Council currently has 3,608 homes throughout the District, 1,166 (32 %) of which are sheltered. There is very little other rented sheltered housing in the District, other than that provided by the Council. There is good demand for rented housing in most areas in the District, with some lower demand for sheltered housing being tackled by the Council, and these three 'lower demand' schemes have been included in this options appraisal:

- Bass's Crescent, Castle Gresley
- Pine Grove, Newhall
- Smallthorn Place, Woodville

A location plan at appendix 1 shows where these schemes are located, and how they relate to the other schemes owned by the Council.

The Council's recently prepared Housing Revenue Account Business Plan for 2003/4 identifies the need to have a more comprehensive housing register that enables demand information to be analysed by scheme, and the need to undertake research into demand to enable the Council to understand how the public perceives its housing services, and aspirations to move into Council owned sheltered accommodation in the future.

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<sup>1</sup> Vacant rented property

This information gathering has already been started with Facilities Audits being undertaken for all sheltered schemes (those with communal facilities being audited first) and the reports for Smallthorn and Bass's have assisted in this report, and are attached at Appendix 1. This will enable the Council to consider its sheltered services, the costs of its provision and perceptions of tenants separately from its general stock so that it can target improvements and changes.

The Business Plan demonstrates that the Council is able to maintain its Housing Revenue Account (HRA) in surplus for the 30-year period of the Plan, whilst investing a maximum of £1.3m in improvements to its sheltered schemes, in addition to any responsive and planned repair works.

This report covers Stage 1 of the appraisal process (stock condition issues, scheme performance and environmental issues) and enables the Council to debate whether to proceed with consultation with residents about the future of the schemes. This meets the requirements of the Housing Inspectorate in terms of the Council taking decisions about how to deal with vacant or unpopular schemes, and to address poor conditions in some schemes.

## Summary of findings

In general demand for sheltered housing has decreased in recent years although demand for many schemes in South Derbyshire District remains good. Despite this, the Council will be reviewing all its sheltered housing over the next year in anticipation of a Supporting People review within the next couple of years, to ensure that its provision matches demand, is to a good standard and at comparable cost to other providers.

There are 15,200<sup>2</sup> people aged 60 or over resident in the District, with about 2% on the housing register for a bungalow with the Council. The majority of older people currently live in Etwall (27%), Hartshorne (24%), Hatton (21%), Melbourne (23%), Netherseal (22%), Overseal (21%), Repton (20%), Swadlincote (23%) and Walton (22%).

The County Lead Officer for Supporting People was consulted as part of this appraisal and had no objections to the decommissioning of schemes in the District. The information that she was able to provide from the Government's assessment of District level provision indicated that between 10 and 229 homes are required, however this assessment is based on formula and assumptions and should be treated with caution. There is however little specific research to support the number of sheltered homes that are required across the County, and at the present time demand indicated by the housing register is the main source of information available to the Council.

Overall the three schemes are structurally in a good state of repair. However, there are other issues highlighted by the surveys, and these include:

- The increasing levels of voids being experienced in the schemes
- The poor appearance of communal areas and the need to upgrade these
- The need to re-model bed-sits into self contained flats to meet tenants' and prospective tenants' aspirations
- The general appearance of the schemes is poor and these need to be improved and maintained to a higher standard
- The need for better management of the maintenance contractors, cleaning, facilities and services within each scheme including lighting to communal areas.

The information available demonstrates the lack of demand from older people for sheltered accommodation in these specific schemes. It is therefore concluded that although the Council might be able to target resources into these properties to improve them to a reasonable standard this would have minimal effect in terms of their desirability in the long term, and the Council might feel it more appropriate to direct its resources to more popular schemes.

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<sup>2</sup> Oxford University population estimates for wards in England mid 1998

## Methodology for the appraisal

The options appraisal for the three sheltered schemes is being carried out in stages to ensure that the widest view is taken of property condition and stakeholder views. The stages to be used within this appraisal process are set out below:

### *Stage 1 - stock condition survey*

- Stock condition and amenity study (including decent homes appraisal, design, accessibility and performance) through on-site survey to collect information,
- Stock performance data desk-top review of information provided by key Council officers,
- External environment survey (location and accessibility) through on-site survey

From the work undertaken at Stage 1, this report has been prepared to enable Committee to consider the issues before the appraisal moves to the next stage.

### *Stage 2A - consultation*

Residents and relative/carer and Wardens survey and consultation meetings and then collation of views.

### *Stage 2B -*

Generation of alternative options available and options appraisal conclusions. This will include consideration of the options available to maintain the schemes for existing use to improve the properties and to ensure compliance with the Decent Homes Standard through retention, retention and improvement, Arms Length Management Organisation, Private Finance Initiative, partial or full transfer, partnerships. It will also consider the options available to the Council in decommissioning the schemes for older persons and use of the property in the long term including the range of options as above as well as conversions, disposal and use for alternative client groups.

After the completion of stages 2A and 2B a report will be prepared for Committee to enable discussion about the future of the schemes and agreement about feedback and future involvement of other stakeholders in decisions and changes.

## Sheltered Schemes Options Appraisal

### Stage 1 – stock condition survey

#### *Stock survey*

Property inspections were undertaken on 11 June 2002 by Mark Bradley (Pennington Consulting and Support, Property & Services Manager) using a survey form specifically designed for the purposes of the assignment, taking into account the type and nature of the buildings in question, Decent Home Standards, legal obligations and the aspirations of the Council to provide good quality accommodation for older people.

As well as collecting information on the condition on each of the sheltered schemes information was also collected to assess compliance with the Decent Home Standard including an assessment against the following:

- Fitness Assessment
- Reasonable State of Repair
- Modern Facilities
- Thermal Comfort

The Council is required to ensure that all of its properties meet the Decent Homes Standard by 2010.

#### *Stock Performance Data*

As part of the appraisal process the following scheme specific information was sought and is presented later in the report.

- Rental levels
- Service Charge levels
- Void rent loss
- Scheme demand – waiting list information

## Stage 1 - findings

### Bass's Crescent

The scheme is situated conveniently for a Chemist and Post Office, however there are few general shops locally. The area is attractive and generally popular for other types of housing, although older people are reluctant to take housing at Basses Crescent partly because of the general housing in the area and some perceived problems with children.

The scheme has 26 homes, 12 bed-sits, 12 one bedroomed flats and 2 wheelchair accessible bungalows. The bed-sits have shared bathing facilities and as such, fail the Decent Homes standard.

It was built in 1972 and is generally in good condition, however communal facilities are poor and in urgent need of upgrading and furniture does not meet relevant fire retardant standards.

The bed-sits would need converting into self-contained flats to assist with lettings as the majority (8 out of the 12) are vacant with some of these having been vacant for over 3 years, and the corridors serving the bed-sits are narrow and badly lit. There are also five vacant flats.

Rents at Basses Crescent range from £50.48 to £54.79 per week, with a service charge of £5.86 to £7.93. The average age of existing tenants is 75 years of age, however no facilities exist to provide extra care to older residents. There is however a lift at the scheme.

The condition survey showed the general condition of the structure and its elements were generally in a good state of repair, however the dwellings inspected as part of the stock condition survey<sup>3</sup> failed the decency standard and this has cost implications in terms of achieving the standard in the future.

The scheme gardens were over grown and had not been maintained for some time and give the scheme a poor overall appearance.

The facilities audit is attached at Appendix 1 for information.

Rent loss for each vacant property at the scheme will cost the Council in the region of £3,095.56 each year just in lost income.

Demand for the scheme is poor from prospective tenants.

### Recommendations

It is recommended that consultation is carried out with tenants and that subject to this the scheme is decommissioned for use for older people.

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<sup>3</sup> Property Tectronics South Derbyshire District Council Stock Condition Survey 2002

### **Pine Grove**

The 16 two bedroomed bungalows and 16 one bedroomed flats are situated close to a school in a reasonably popular area. There are no communal facilities at the scheme and it is not specifically designed for older people. However the bungalows are the only ones in Newhall for older people and these are very popular. The scheme is complemented by a large green onto which the homes look.

Currently 6 of the one bedroomed flats (all situated on the first floor with no lift for access) are vacant with many of these vacant for close to 3 years.

The condition survey showed the general condition of the structure and its elements were in a good state of repair.

There are no communal facilities for the scheme, but there are some common entrances and passageways. There are no facilities or adaptations that make the properties particularly suitable for older people.

The open spaces adjacent to the scheme are well kept.

Rent loss for each vacant property at the scheme will cost the Council in the region of £2,790.58 (exclusive of service charge) each year just in lost income, with average rents for the scheme varying from £52.42 to £54.91.

Demand for the flats within the scheme is poor from prospective sheltered tenants.

### **Recommendations**

It is recommended that consultation is carried out with tenants and that subject to this the flats are decommissioned for use for older people.



### **Smallthorn Place**

The scheme is situated at the foot of a steep incline, although convenient for a general-purpose shop and public transport. The area is reasonable but there is very little demand for Smallthorn from older people.

The scheme has 25 homes, 13 bed-sits, 11 one bedroomed flats and 1 two bedroomed flat. It was built in 1972 and is generally in poor condition. It is a drab grey brick building, with communal lounge, kitchen, laundry, walk in showers and guest room, however communal facilities are poor and in urgent need of upgrading and furniture does not meet relevant fire retardant standards. There is a Stannah home-lift at the scheme but this does not serve the building fully.

The bed-sits need converting into self-contained flats to assist with lettings, and 6 of the properties are currently vacant and have been for some considerable time.

Rents at Smallthorn range from £49.74 to £51.98 per week.

The condition survey showed the general condition of the structure and its elements were generally in a good state of repair, and dwellings inspected as part of the stock condition survey<sup>4</sup> met the decency standard. However, improvements would be required to corridors that are long and badly lit, as well as to address the issue of unpopular bed-sits and poor access to some areas that are not served by the home-lift. The scheme has had £75,000 spent on improvements in the last three years.

The facilities audit is attached at Appendix 1 for information.

Rent loss for each vacant property will cost the Council in the region of £3,055.52 per year just in terms of lost income.

### **Recommendations**

It is recommended that consultation is carried out with tenants and that subject to this the scheme is decommissioned for use for older people.

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<sup>4</sup> Property Tectronics South Derbyshire District Council Stock Condition Survey 2002

## Conclusions

The three sheltered schemes included within the appraisal; Bass's Crescent, Smallthorn and Pine Grove all suffer from low demand from prospective residents, with the exception of the bungalows at Pine Grove. Although they are all basically in sound physical condition they are generally poorly maintained and in need of modernising and some require significant improvements (particularly to communal areas) to meet prospective tenants' aspirations in the future.

Pine Grove is basically accommodation that is suitable for general needs, it is not specifically designed for older people either in terms of facilities or access. The other two schemes have communal areas and are more suited to the needs of persons with support needs.

It is recommended that the Council consult with tenants about the decommissioning of the schemes for older people, with the exception of the bungalows at Pine Grove. However, it is recommended that the tenants of the bungalows are included within the consultation about the decommissioning of the flats within the same scheme.

**Chantelle Hayes DipFM MRICS FCIH**  
**DIRECTOR**  
**Pennington Consulting and Support**

Appendix 1

FACILITIES AUDIT

Scheme Name: Bass's Crescent

Scheme No:

Brief description of accommodation:	Bass's Crescent is a traditional brick built sheltered housing scheme with a mixture of one bedroomed flats and bed-sits. Attached to the scheme are two wheelchair accessible bungalows. The scheme is situated in a residential area close to some shops and bus stops. Approaches to the scheme are flat and the rear of the site is surrounded by an extensive grassed area.							
Dwellings type	GFB	FFB	GF1	FF1	GF2	FF2	B1	B2
Number	6	6	6	6				2
Other dwelling types	Type:				Number:			
Dwellings number total	26							
Built form	Traditional brick							
Number of storeys	2							
Approx age	30 years (1972)							
Communal facilities	Common Room	Communal Kitchen	Guest Room	Communal Toilets	Other			
	Yes	Yes	Yes	Yes				
General condition of dwellings (excellent/good/poor)	Good							
General condition of communal facilities	Poor							
Type of warden call system	Yes	Make	Tunstall Piper Group					
Door entry system	Yes	Make						
Lift installed	Yes	Make	Stannah (Homelift)					
Fire alarm installed	Yes	Make	Firedex 1000 (JSB Electrics Ltd)					

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Occupancy:			
How many homes are occupied/vacant by type:	Occupied		Vacant
Flats	7		5
Bedsits	4		8
Bungalows	2 (Full wheelchair standard)		
Other (specify)			
Please confirm average rent per home per week:			
Flats	£51.46		
Bedsits	£50.48		
Bungalows	2BB: £54.79		
Other (specify)			
Please confirm average service charge per home per week: (Heating)	Bedsit	1BF	2BF
	5.86	7.93	
Average age of tenants as at (date of visit)	75.00		

General condition of scheme:	
	Some: The corridors linking the blocks have windows on

Are communal corridors bright and attractive?	either side and are bright and airy, however the corridors where the flats and bedsits are situated are narrow, low and poorly lit.			
Are all communal areas well lit?	Adequate			
Is there a communal lounge? Is this attractive and bright?	Yes	No	Yes	No
Is there a communal kitchen? Is this attractive and well equipped?	Yes	No	Yes	No
Is appropriate fire fighting equipment available?	Yes	No		
Is there appropriate communal storage and cleaners areas?	Yes			
Is there a warden's office?	Yes			
Is a lift or other means of easy access available to all floors?	Yes			
What money has been spent over the last 3 years on other than day to day repairs at the scheme?	None			
Is the scheme overall suitable for older people?	Yes	No		
Is the scheme located near to facilities and amenities required by residents?	Yes	No	Some	
What improvements are required to communal areas including gardens?	The whole scheme gives off an air of disrepair. The interior grey brick is dour and could be improved by painting. In the small common room all chairs, tables and curtains need to be replaced. The kitchen is also in need of refurbishment. The garden areas are significantly overgrown and need instant and regular attention. The boundary of the scheme could be better defined and made more attractive and secure by providing fencing or barrier planting.			

Accommodation:	
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Are locks suited to all flats and communal areas?	No		
Are keys available for all vacant properties?	Yes		
What is the general condition of accommodation?	Mixed dependent on tenant.		
Is the layout of accommodation suitable for older people? (if no specify why?)	Yes	No	Bedsits and one bed flats appear to be spacious in comparison with similar schemes.
Has accommodation got kitchen and bathrooms less than 20/30 years old and an efficient heating system?			
Are any improvements required to the accommodation?			

Services:				
What services are provided at the scheme?				
<b>Service</b>	<b>Yes/no</b>	<b>Contractor</b>	<b>Frequency</b>	<b>Cost</b>
Fire equipment testing	Yes	Goodmans	Quarterly	
Lift maintenance	Yes	Stannah	Quarterly	47.09
Warden services		SDDC	Every other working day	6.50 (wkly)
Alarm maintenance	Yes	Tunstall Telecom	Call-out	574.21
Cleaning	Yes	SDDC Cleaner	Mon - Fri (14 hrs)	
Gardening (Grass cutting)	Yes	SDDC		
Window cleaning	No			
Electrical testing				

Water testing	Yes			
Other services (specify)				
Are the services provided adequate in terms of standards? Are there any service required that are not provided at present?	Yes....need window cleaning contract.			

### FACILITIES AUDIT

**Scheme Name:** Smallthorn Place

**Scheme No:**

Brief description of accommodation:	Smallthorn is a foreboding block of flats and bedsits surrounded by grassland at the foot of a fairly steep incline. It has spacious communal areas but flats are situated in long, low poorly lit corridors. The overall feeling is one of decay and deterioration.							
Dwellings type	GFB	FFB	GF1	FF1	GF2	FF2	B1	B2
Number	7	6	5	6	1	-	-	-
Other dwelling types	Type:				Number:			
Dwellings number total	25							
Built form	Grey brick, gable-ended blocks.							
Number of storeys	2							
Approx age	30 years (1972)							
Communal facilities	Communal lounge, kitchen, laundry, toilets, walk-in showers, guest room.							
General condition of dwellings (excellent/good/poor)	Poor							
General condition of communal facilities	Poor							

Type of warden call system	Yes	Make	Tunstall Piper "Group"
Door Entry system	Yes	Make	Senturian: No "warden-call" button or coded entry.
Lift installed	Yes	Make	Stannah (Homelift)
Fire alarm installed	Yes	Make	Firewin A10.



Occupancy:				
How many homes are occupied/vacant by type:	Occupied	19	Vacant	6
Flats	4			
Bedsits	2			
Bungalows	NA			
Other (specify)				
Please confirm average rent per home per week:				
Flats	1BF	£51.98	2BF	£49.74
Bedsits	£51.21			
Bungalows				
Other (specify)	All figures above include a £6.50 Warden charge			
Please confirm average service charge per home per week: (Heating)	Bedsit	1BF	2BF	
	5.86	7.93	9.93	
Average age of tenants as at (date of visit)				

<b>General condition of scheme:</b>				
Are communal corridors bright and attractive?	No			
Are all communal areas well lit?	No			
Is there a communal lounge? Is this attractive and bright?	Yes	No	Yes	No

Is there a communal kitchen? Is this attractive and well equipped?	Yes	No	Yes	No
Is appropriate fire fighting equipment available?	Yes	No		
Is there appropriate communal storage and cleaners areas?	Yes			
Is there a warden's office?	Yes			
Is a lift or other means of easy access available to all floors?	No...due to being built on an incline two partial corridors are accessed by a flight of six steps. One of these corridors leads to the bin store room causing tenants with poor mobility to need to walk a considerable distance outside the building to access the waste bins.			
What money has been spent over the last 3 years on other than day to day repairs at the scheme?	£75,000 ( replacement heating system )			
Is the scheme overall suitable for older people?	Yes	No	Generally, although the stepped corridors and the external access at the foot of a hill make it not ideal.	
Is the scheme located near to facilities and amenities required by residents?	Yes	No	There is an all-purpose shop and access to buses approximately 500 yards from building	
What improvements are required to communal areas including gardens?	Communal areas need redecoration, new furniture and equipment, new lighting, new carpets and curtains. Externally the gardens could be defined by fencing or barrier planting, paths need levelling and weeding. A large street light directly outside the building needs replacing or resiting. The communal drying area is very poor and difficult to access. This area could be repositioned at the rear of the scheme in a court-yard garden area.			

Accommodation:	
Are locks suited to all flats and communal areas?	No – locks on flats being changed as properties become void. No in communal areas.
Are keys available for all vacant properties?	Yes

What is the general condition of accommodation?	Dependent on tenant but most appear to be in fair condition.		
Is the layout of accommodation suitable for older people? (if no specify why?)	Yes	No	Both 1 bed flats and bedsits are quite spacious when compared with some schemes.
Has accommodation got kitchen and bathrooms less than 20/30 years old and an efficient heating system?			
Are any improvements required to the accommodation?			

Services:				
What services are provided at the scheme?				
<b>Service</b>	<b>Yes/no</b>	<b>Contractor</b>	<b>Frequency</b>	<b>Cost</b>
Fire equipment testing	Yes	Goodmans	Quarterly	
Lift maintenance	Yes	Stannah	Quarterly	47.09 (Qtly)
Warden services	Yes	SDDC	Every other working day	6.50 (Wkly)
Alarm maintenance	Yes	Tunstall Telecom	Call-out	580.98 (per annum)
Cleaning	Yes	SDDC Cleaner	Daily (weekdays)	
Gardening (Grass cutting)	Yes	SDDC		
Window cleaning	No			
Electrical testing				
Water testing	Yes			
Other services (specify)				
Are the services provided adequate in terms of standards? Are there any	Yes...need window cleaning contract.			

service required that are not provided at present?	
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