



Care & Repair Cymru

How to do it Mini Guides

Establishing a Cyclical Home Maintenance Scheme

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1. AIM OF THE MINI GUIDE



- 1.1 The principle aim of this Mini Guide is to provide Care and Repair Agencies with an outline model for establishing a Cyclical Home Maintenance Scheme based on the embryonic service developed by Bridgend County Care and Repair. In addition the Guide seeks to share good practice as well as highlighting the key challenges that can be presented along the way.
- 1.2 It is hoped that by sharing the challenges and experiences in Bridgend, the Guide will not only disseminate good practice but will also help Agencies to focus their efforts towards developing a Home Maintenance Scheme with greater confidence and with a sound knowledge base.
- 1.3 Also the fact Bridgend has shown the feasibility of partnership set ups may also give greater confidence to potential partner organisations such as Registered Social Landlords, Local Authorities and Health Boards in other areas to invest and/or support the initiative. The Guide can therefore be used as a source of reference to encourage greater investment in this essential service for the future.
- 1.4 Ultimately it is hoped that this Guide will help improve the scope of housing options available for older home owners.

2. THE IMPORTANCE OF HOME MAINTENANCE AND THE INTRODUCTION OF A PRO-ACTIVE RESPONSE



A. IDENTIFYING THE NEED FOR HOME MAINTENANCE

2.1 In order for the house situated on the left, in the above photograph, to get into this state of disrepair it has taken some 30 years coupled with some vandalism.

2.2 That is one of the problems! The rate of deterioration of a property is slow and it is ultimately only when the roof starts leaking that the householder realises there is a problem and urgent and costly building work is required. This often turns into a crisis situation particularly for older people.

2.3 It is important to note at this point in the guide that there are a number of reasons why homeowners fail to maintain their homes. These include:

- The inability to diagnose what is required. Research has shown that the much older stock is in the hands of very old occupiers who are least likely to commission routine maintenance (Leather and Williams 1996);
- The availability of suitable builders to carry out small scale works at a reasonable cost;
- Low income and lack of savings and for many older people retirement incomes are insufficient to keep up with repair to their homes;
- An added dimension is the ageing of the population of middle aged household who bought their homes under Right to Buy in the 1989's and early 1990's many of whom have low incomes¹. This group is currently more likely to face home maintenance and repairs problems as they now approach their mid-seventies;
- Experience of shoddy workmanship can act as a deterrent from encouraging home owners to invest in further repairs and maintenance.

¹ Phillip Leather - "Crumbling Castles" (2000).

- 2.4 Neglect of routine building maintenance results in the need for costly and disruptive remedial work. For example, failure to clear a gutter can cause a blockage, which may lead to damp and damage in a building potentially placing the owner at risk of injury and/or ill health.
- 2.5 It is estimated that 78% of those aged 70 plus in Wales are owner occupiers who are disproportionately on low income. Wales also has some of the highest rates of disrepair and unfitness levels.



'Fuel Poor'

- 2.6 Older people are also more likely to be fuel poor with one in five households having someone aged 60 or over experiencing fuel poverty. Increasing the energy efficiency of a person's property by maintaining its key component parts and services are important factors in reducing ill health.

Ill Health & Poor Housing Quality

- 2.7 The link between ill health and poor quality housing is well established particularly among older people. Over 39% of people over the age of 65 are estimated to have a long term illness.

The increased incidence of ill health associated with poor living conditions is likely to add millions of pounds of additional costs, not only to health and social care services but also to a wide range of other key service providers such as the emergency services etc.

Declining Capital Funding

- 2.8 With declining capital grant expenditure for home renovation and repairs the significant rise in low-income home ownership, the overall ageing of the homeownership population and concerns relating to the future condition of the housing stock has intensified the need to find new ways of enabling and encouraging home owners to sustainably invest in maintaining their homes before they fall into disrepair.

B. OUTLINING THE HOME MAINTENANCE SERVICE RESPONSE

- 2.9 The service aims to provide in-house and complimentary partnership solutions that will provide a client centred, needs-led, service that is tailored to develop a planned programme of repair to a client's property, whilst also reducing environmental risks/ hazards.
- 2.10 In Bridgend the Home Maintenance Officer is appointed to oversee the scheme on behalf of BCC&R. The service provides a free comprehensive diagnostic home maintenance survey that includes a report outlining the condition of the property and examines the short, medium and longer-term repair requirements and cost implications.
- 2.11 An alternative option for the Client would be for the Care & Repair officer to complete a Healthy Homes Check Part 2. This survey report, like the HM survey, includes an emphasis on the health and well being of the homeowner.
- 2.12 The Home Maintenance Survey and Healthy Homes Check examine the condition of the property and highlight any environmental hazards that could pose a potential risk to the older home owner.
- 2.13 The Assessment also acts as a catalyst in brokering in a range of other services, including referring to other organisations, that can offer solutions that enable older people to remain living safely and independently in their homes.

This can often incorporate other Agency services i.e. Handyperson, Casework Service etc., which allows for an integrated approach in attempting to resolve maintenance issues.

The Home Maintenance Officer also provides practical support and advice in relation to drawing up specifications, obtaining estimates from external [approved] contractors, scheduling costs and the supervision of any building work in progress.

- 2.14 Households respond rather than anticipate repair requirements and tend to favour low cost solutions that may fail to tackle underlying problems (Leather and Reid 1989). Indeed Care and Repair Agencies across Wales are acutely aware that for many older people once the immediate housing repair problem has been resolved, underlying repair issues will tend to present themselves, often only when crisis situations occur.

The Scheme is therefore a potential mechanism for encouraging preventative action by providing advice and assistance to enable older people to make informed decisions about maintaining their home, the need for future repairs and any adaptations that may be required.

3. AIMS AND OBJECTIVES OF THE SCHEME

3.1 We know that the majority of older people want to continue living independently in their own homes for as long as possible. It makes sense therefore to ensure that their properties are kept in the best possible condition to try to ensure that:

- Security, comfort, and safety can be achieved
- Damage and expensive repair bills are avoided
- Energy saving measures can reduce fuel costs
- The value of the property is maintained or increased

3.2 The best way to achieve these aims is by carrying out **preventative and planned home maintenance**.

Home repair and maintenance initiatives can represent a significant change for most local authorities from the way they have operated in the past. Instead of waiting for housing problems to develop that require increasingly expensive solutions, maintenance schemes are an effective way of actively working to prevent decline.

The Welsh Government through its report *'Housing for Older People'*, undertaken by the Social Justice and Regeneration Committee, recommended that initiatives should be developed with Care & Repair Agencies to encourage home maintenance in properties occupied by older people.

3.3 The interventions provided by the Home Maintenance Scheme by reducing environmental hazards associated with accidents in the home as a consequence of poor design and inadequate maintenance of the building can therefore result in significant savings for local authorities in relation to primary, social care, hospital admissions, bed days and residential care costs.

Poor unsuitable housing conditions experienced by older people might force some into residential care and prevent them leaving hospital and/or residential care. Thus there are potential cost savings in health and social care spending. Such initiatives can also help to sustain home ownership.

3.4 The scheme actively seeks new ways of promoting early home maintenance enabling owners to routinely invest in their homes before they fall into substantial disrepair.

3.5 To maintain a database of housing conditions over a period of time that can provide important information to aid housing strategies for older people in the community.

3.6 The Planned Maintenance is used to identify defects and incipient problems, and develop a programme of repair and containment that will prevent premature failure of the property's components and deterioration to a point where more substantial works may be required.

4.0 HOW TO SET UP A HOME MAINTENANCE SCHEME

In Partnership with Social Landlords

- 4.1 Care and Repair Cymru recognised that a number of housing repair and safety issues could be resolved if day to day maintenance and repair schemes were available on a similar basis to those provided by **Registered Social Landlords**. This was based on **preventative** rather than **crisis intervention**.

Also, older homeowners were easy prey to rogue traders and did not have the benefits of repair and home maintenance services provided to tenants through Social Landlords and/or Local Authorities.

Research carried out by McLean Associates and PEP Ltd², had shown that in areas where Registered Social Landlords had extended their repair services to homeowners, there were positive outcomes for homeowners and landlords. These included:

- A trustworthy, reliable and competent service with access to a range of different skills/trades
- Excellent value and speed of service.
- A well-monitored and accountable service.
- Advice and assistance with more complex work.

Such developments are proven to have reduced the cost of repair in the private sector and have helped to further regeneration objectives.

- 4.2 In addition, the Joseph Rowntree Foundation's report '*Helping Owners to Repair and Maintain their Homes* (March 2000)' had also promoted the need to extend the roles of home improvement agencies, the private sector and Registered Social Landlords to provide broader services to enable homeowners to invest in repairs and home maintenance.

Partnership with Valleys to Coast Housing Limited

- 4.3 Bridgend County Borough Council was the first Authority in Wales to undergo a stock transfer and in 2003 Valleys to Coast Housing (V2C) Limited was established. In 2005 the Agency received funding to develop its Handyperson Service.
- 4.4 In addition the Agency and Valleys to Coast Housing Limited developed excellent strategic and operational links. In addition to providing financial support to Bridgend County Care and Repair, its Chief Executive also served on the Agency's Board of Management.

The Agency had also accessed technical advice and support through its Housing Repairs Section and V2C's complimentary trading activities that enabled the Agency to purchase additional expertise to develop the Agency's Handyperson Service.

² Repairs for All: How Social Landlords can extend their Repairs Services to Local Homeowners - Sarah McLean 1998.

- 4.5 Following initial discussions with V2C the potential for taking forward a joint Home Maintenance Service was identified.

Valleys to Coast Housing Limited would act as the main contractor to service the Scheme that would include a **Home Insurance Maintenance Package** and 24/7 Emergency Repairs Service. This would be supported by a free annual cyclical home maintenance survey provided by the Agency including a comprehensive report outlining any urgent, medium or long term repairs that were required to the property. This would be integrated as part of the Care and Repair bespoke housing service.

- 4.6 However it was agreed that further evidence was required to support the need to develop the service. **A three-phase development** programme was therefore put in place before Piloting the Scheme and formulating a comprehensive **Partnership and Service Model**.

TWO PHASE DEVELOPMENT PROGRAMME -

Phase 1: Methodology

i. Establishing a Project Board

- 4.7 It is vital that a local strategic partnership is formalised from the early stages of the Scheme's development. It is therefore recommended that a Project Board be established consisting of senior representatives from Housing Renewal, Social Care, Health and also a Registered Social Landlord.

- 4.8 The primary purpose of the Board should be to monitor the progress and assess the future viability of the service.

- 4.9 The Project Board should ideally meet monthly for Phase 1 of the Piloting of the service and an Action Plan drawn up for monitoring purposes. Terms of Reference should also be drawn up and agreed by all partners at the first meeting.

ii. Identifying the Pilot Area

- 4.10 The Joseph Rowntree Foundation Report '*Local Maintenance Initiatives for Home-owners*' noted that the success of new schemes depended on the size of the area and resources available and it was therefore important not to be too ambitious.

- 4.11 The Staying Put Home Maintenance Scheme identified the highly populated coastal town of Porthcawl as its pilot area. This was due to the demographic and socio-economic environment as outlined briefly below:

- Porthcawl has a large number of older people residing in the area, who make up 32% of the population and it has the highest concentration of people residing within the County Borough over the age of 65.
- Furthermore 78.89% of properties in the area are owner-occupied which is higher than the rest of the County Borough as a whole.

- It was also identified that house prices and economic conditions are such that equity release would be a viable option to explore for the future development of the Scheme.

iii. Research

4.12 Whilst the demographic and socio economic profile of an area may be appropriate it was important to examine existing provision for older people as well as identifying any gaps in services. Therefore it was necessary to carry out a **Survey of Unmet Need**. A copy of the Survey Form is attached in **Appendix 1** of this Mini Guide for your information.

4.13 It was recommended that a sample of at least 1,000 forms be obtained from older respondents (i.e. 50 years and over) who were home owners and resided within the target area of operation.

Bridgend County Care and Repair was fortunate to receive 1,350 completed Surveys of Unmet Need and 67% were from older people residing within the Porthcawl and the surrounding southern wards based within the County Borough of Bridgend.

4.14 Feedback from the Survey allowed the Agency to evidence the need for a greater level of home maintenance advice for older people in the area. This was used to inform potential stakeholders and strategic partners of the gap in service provision.

4.15 The Survey Forms were actively distributed over a period of approximately four months by:

- Mail shots to former and existing clients residing within the target area;
- Agency Caseworkers, Handypersons and by Technical Officers during home visits;
- Engaging with the community and older people at local events;
- Giving presentations and talks at Older People's forums.

4.16 Through actively engaging with the community the Agency was able to gauge the general response to the proposed project as well as assess the general gaps in provision. Many forms were actually completed at events and through direct contact with older people. This proved more successful than the mail shots and the postal system.

iv. Information, Publicity and Public Engagement

4.17 Information is a key component of long-term maintenance and can increase the propensity for homeowners to invest in repairs to their properties and also in preventative and cyclical home maintenance³.

4.18 As part of the development of Phase One of the Pilot Scheme it is recommended that a range of information regarding home maintenance be produced and made accessible.

³ The Jigsaw Puzzle of Housing Disrepair in the Private Sector: Searching for the Missing Piece." (Joseph Kangwa & Dr Femi Olubodun).

Bridgend County Care and Repair produced a Home Maintenance Manual and Information Pack that provided considerable impetus to the development of the Scheme. In addition an official launch of the Manual and Information Pack provided the opportunity to raise awareness of the Scheme amongst a range of strategic and operational partners as well as a large number of older people residing within the pilot area.

- 4.19 In addition the Agency also actively distributed the Home Maintenance Manual and Information Pack to a wide range of organisations and community buildings and meeting places where older people would meet collectively. These included for example, Day Centres, Community Centres, Carers Centre, local libraries etc. Information was also disseminated to Social Care and Health professionals as well as to local voluntary organisations.
- 4.20 Financial Support for the development, printing and distribution of Home Maintenance Manual was obtained from the Local Authority through the Strategy for Older People in Wales Grant. There is in fact a range of funding sources that Agencies may be able to access (i.e. National Lottery Small Grant Scheme etc.).
- 4.21 The Agency also held an official launch of the Manual in order to raise awareness of the importance of home maintenance for older people and this was well attended by local councillors, strategic partners and front-line staff from a range of organisations as well as a large number of older people. The event was followed by a press release that generated over 200 referrals from older people and requests for a copy of the manual from the Agency.
- 4.22 Copies of the Manual and Information Pack can be obtained from Care and Repair Cymru's website – www.careandrepair.org.uk

Phase 2 - Developing the Partnership and Service Model

- 4.23 The development of the Partnership and Service Model was the most challenging aspect of the Scheme and proved difficult for both Bridgend County Care and Repair and Valleys to Coast Housing Limited.

This was mainly due to the fact that this was a new area of development for Care and Repair Agencies and no former precedent had been set from existing or previous service models from which both partners could build. Above all both parties were very much aware of the possible risk areas.

In order to mitigate risk and to ensure the potential future opportunities of the Scheme were maximised a joint SWOT analysis was carried out that formed part of a formal presentation to V2C's Board of Management.

V2C's Technical Department also carried out a separate risk assessment and the outcome of this process defined a clear model that would control risk by including conditions and limitations within the pilot scheme.

4.24 The Partnership and Service Model Framework

It was agreed that the initial pilot scheme should include a maximum of 20 properties over a period of two years and would focus on people aged 50 years and over residing within Porthcawl and the Southern Wards of the County Borough.

The Scheme would provide a cyclical home maintenance service that involved an **annual subscription fee** to cover small scale minor property safety repairs and emergency works. This would also include:

- A free initial up-front Cyclical Home Maintenance Survey to each pilot property. This would be undertaken jointly by Bridgend County Care and Repair and V2C's Technical Department.
- A free Home Maintenance Survey/Condition Report prepared and presented to the Client highlighting:
 - Recommended urgent works, identified with repair costs;
 - Medium term works identified with current estimated repair costs (works recommended to be undertaken between 1 and 5 years);

Table 1, below provides a summary of the Partnership and Service Model and scheme operation:

Summary of Service Model

<ul style="list-style-type: none"> • FREE up-front Care and Repair Home Maintenance and Building Condition Survey • FREE Building Condition Report with indicative costs 			
	Cost	Cover Includes	Benefits
GOLD Cover	£348.00 annum	Cover for property safety works (e.g. burst pipes, leaking taps, and electrical failure). Includes a maximum of 4 Calls per annum. Annual Service of gas boiler and minor boiler repairs Access to V2C's 24/7 out of hours emergency call out service (included in the 4 calls per annum above) Access to V2C's Housing Repairs Service to undertake quoted works as required	£50.00 Cash-back if service is used less than twice during year Works undertaken by V2C's Housing Repairs Service: <ul style="list-style-type: none"> • A local in-house contractor • Reliable service with proven track record • Qualified trades • Professional approach • Housing expertise • Utilising approved heating sub-contractor
SILVER Cover	£198.00 annum	Cover for property safety works (4 Calls per annum) Access to V2C's 24/7 out of hours emergency call out service (included in the 4 calls per annum above) Access to V2C's Housing Repairs Service to undertake quoted works as required	£50.00 Cash-back if service is used less than twice during year Works undertaken by V2C's Housing Repairs Service: <ul style="list-style-type: none"> • A local in-house contractor • Reliable service with proven track record • Qualified trades • Professional approach • Housing expertise

The Client would also be offered the option of including the **urgent works** as an added charge within the cost of the subscription fee or indeed picking and choosing what elements of the urgent works the client wishes to include.

V2C and Care & Repair would then arrange for those urgent works to be undertaken within a month of instruction. The medium and longer term works would not be included as part of the subscription fee, but are identified so that the client can plan for future works and expenditure.

The scheme would not cover major repair works and the subscription fee would not include those works e.g. any major works such as re-roofing, new windows and doors, new heating systems, woodworm infestation, wet/dry rot, structural property failure etc.).

It was agreed that the subscription fee for the scheme would include the following services:

- Access to call the Housing Repairs Service out during the course of the year for undertaking gas appliance repair works - dependent upon cover (see below). The scheme does not cover replacement boilers.
- Annual servicing of gas boiler utilising the Housing Repairs Service's Approved Gas Servicing Contractor - dependent upon cover (see below).
- It was agreed that the Client could choose to include gas boiler repair cover as part of the scheme, but this would be dependent upon the age and condition of the gas boiler.

To be able to be included, the boiler would need to be under 15 years old and have a current Annual Gas Safety Certificate which confirms that the boiler has been serviced within the last 12 months. The Scheme does not cover replacement boilers.

The Pilot Scheme would also incorporate an annual review after 12 months with a break clause open to all parties.

The Scheme also includes the option for Clients to seek quotations for the Housing Repairs Service to undertake specific larger scale works or to seek support from Bridgend County Care and Repair's Core Technical and Casework Service.

4.25 Defined Areas of Responsibility

The Partnership Model is also based on mutual responsibilities as outlined below:

Bridgend County Care & Repair

- Promotion, marketing and referral for the service;

- Providing an annual home inspection (using the Care and Repair environmental assessment tools) – the ‘property doctor’ approach;
- Providing the client with an MOT for the home, based on a schedule of short, medium and long term need (including likely costing/impact);
- Providing a comprehensive Casework and Technical/Home Maintenance Service for those clients requiring larger scale work to their properties (including those works outside of V2C’s Insurance Model);
- Developing a home maintenance investment/savings plan, based on a ‘Denta-plan’ approach;
- Providing low level, efficient, good value and trustworthy works through an in-house Handyperson service;
- Co-ordinating works tailored to the older person’s aspiration, and based on a mixed-economy of local service solutions/options;
- Supervision and quality assurance, including customer satisfaction.

Responsibilities of Valleys to Coast Housing Limited are:

- Providing a 24/7 emergency call out service, that provides a safety framework for gas, electrical, water or structural emergency.
- Providing a reactive, efficient, good value and trustworthy repair and maintenance service with ‘badged’ technical operatives.

Responsibilities jointly owned are:

- Joint home assessments;
- Joint technical audits;
- Jointly owned service standards, corporate risk and health and safety procedures;
- Development of non-mainstream maintenance services, e.g. decorating and garden maintenance.

C. BRIDGEND COUNTY CARE & REPAIR’S MULTIFACETED APPROACH TO PLANNED MAINTENANCE, IN PARTNERSHIP OR AS A STAND ALONE SERVICE

4.26 Setting up the role of Home Maintenance Officer (HMO)

The Home Maintenance Officer’s role is pivotal to the success of the Scheme. It is therefore vital that the right person is appointed. It may be that an existing Technical Officer within your Agency, who already has experience of the Care and Repair Service, may be suitable for the role. A sample Job Description and Person Specification is attached in Appendix 3 of this Guide.

Alternatively the role could be absorbed within an existing Technical Officer’s post if the capacity and funding levels allow. It must also be noted that for the pilot period the service would be limited to a relatively small sample of cases and within a designated area of operation. Therefore a part-time post would be sufficient during the initial pilot period depending on local conditions.

Budget costs equate to a Technical Officer's post. Staff and office costs should also be included as appropriate. Funding for the post can be difficult to obtain. Bridgend County Care and Repair has managed to sustain the post through surplus fee income as well as "one off" grants from the Local Authority and Health Board.

4.27 The HMO Assessment Tool

The documentation that makes up the assessment tool is employed when compiling the data required to plan a structured response to maintaining the dwelling and addressing the client's needs.

This entails a detailed condition survey of the property, comprising an assessment of the external fabric and internal and external components, a summary of recommendations and a planned maintenance programme. The survey report in addition to gathering information about the condition of the property includes sections on assistive technology, heating provision, falls prevention, security and an assessment of disabled adaptations required. It incorporates approximate cost implications so the client is aware of future commitments, and is able to make an informed decision whether to proceed.

4.28 Developing an Interdisciplinary Framework to Provide a Structured Response to Maintenance and Associated Issues Implicit to the Well Being of the Client

Subject to the set up of each Care & Repair agency, an integrated response should be implemented to involve where applicable, the Handy Person scheme, Case Workers, Technical Officers, external contractors [from an approved list] and other partners and organisations.

Referrals to the scheme can be from Caseworkers, other Technical Officers, Handy Persons or external organisations who are aware of the project. As discussed above, public engagement will also generate interest in the scheme.

The information collected in the assessment tool identifies the need for and recommends referrals to other agencies e.g. Occupational therapists for disabled adaptations, Government heating & energy efficiency schemes, Police security schemes and Fire Service schemes. This would also dovetail with the workload undertaken by Caseworkers and other Technical Officers.

The HMO, after discussions with the client and case worker regarding budgets, compiles a programme of works, that may involve specifying and seeking tenders from external contractors, or allocating minor works (that are immediately required to be undertaken) to a Cover Plan.

4.29 Link to Core Service

It is important to note that during the progress of developing this service the number of requests for clients seeking help to progress privately funded work increased tenfold.

As this trend has increased, home maintenance has become fully integrated

into the Agency's core service providing specialist support for those clients who wish to undertake medium to major works that are privately funded.

This includes drawing-up scheme plans (as required), compiling specifications, obtaining estimates from contractors, scheduling costs as well as the supervision of any building work in progress.

5. HOW TO RUN A HOME MAINTENANCE SCHEME

A. In Partnership

5.1 At the Strategic level

As discussed in Section 4 the project is piloted in a designated area with a modest number of properties included in the scheme.

The project board should meet every 6 weeks to monitor the progress of the scheme. Matters to monitor and discuss would be:

- Assessment of the call out response required during the trial period
- Monitoring feasibility of charges in relation to scheme overheads.
- Monitoring tendering processes for works in planned maintenance programme agreed with clients.
- Site reports of annual maintenance surveys
- Customer feedback
- Capacity levels and future development
- Auditing of the scheme
- Health & safety assessments

5.2 At the Operational level

- Stage 1: Once the initial condition survey is completed, the Agency & V2C are to agree what urgent works are required; if they can be incorporated in the cover plan and what would be the initial additional charges to the client. These items of work would be minor in nature and could be undertaken by either the Handy Person Service or V2C's direct labour team.
- Works that cannot be included due to cost implications will be discussed between the HMO and the client and an agreed planned maintenance programme put in place.
- The Agency would be responsible for administering the planned maintenance programme after stage 1 is completed [see below]
- V2C would be responsible for administering the cover plan emergency call outs and the annual servicing of the heating boiler.

5.3 Standalone Service by the Agency

The Home Maintenance Officer's role would be as in the partnership link up, but would be involved solely in deciding what immediate works could be undertaken by the Handy Person service, and what works would need to be tendered for, as part of the maintenance programme.

5.4 Utilising the Assessment Tool

Whether in partnership with other agencies, or as a sole C&R enterprise, an annual maintenance check is agreed with the client. This can be part of a full planned maintenance programme or a standalone service. This involves two elements:

- General maintenance tasks to the external fabric and curtilage of the property: cleaning out guttering, gullies, vents, hose through drains, clean down pathways etc.
Note: If a Handy Person Scheme is available it can undertake this work, or as an alternative, enter into a contract agreement with an approved external contractor. The cost is based on an hourly rate for the Handy Person option, and the tasks can be undertaken within one hour. This maintains the charge at a modest level, in order to be attractive to, and within the acceptable budget levels of the client.
- Annual technical survey of the external fabric and a review of the internal components assessed in the initial condition survey of the property. This is undertaken by the HMO and would involve a visual inspection of the main external components of the building that are crucial to the good maintenance of the property, both externally and internally with its potential collateral impact.

5.5 The Planned Maintenance Programme

The data collected in the condition survey that requires action is collated in a summary (refer to Appendix 3) that recommends and grades the priority of the response. The defects identified would be allocated to the following four categories: works requiring an immediate response; works to be undertaken within the first year; in the second & third years; and within five years. The approximate cost implication of each item of work is accordingly listed. The summary allows for commissioning reports from specialist agencies and other professionals to support and aid the assessment.

5.6 The criteria employed when assessing and implementing the maintenance programme is outlined as follows:

1. Defects to the external fabric of the property should be addressed as a key priority to prevent further deterioration and compound damage to other components.
2. Structural defects to the dwelling and factors undermining the stability of the property, i.e. collapsed drains, unstable retaining walls, close proximity of tree roots etc.
3. Economic judgement to decide between sustainable short to medium term repair against immediate replacement of components, which would provide immediate and long term benefits.
4. The client's wellbeing & health & welfare would be key factors. This would include checking the safety of their environment and assessment of disabled adaptation requirements
5. Extent of repair to suit client's budget: minor repair versus replacement/substantial repair - assessing whether minor repairs would **suffice** in the short term to contain a defect and defer replacement, or comprehensive repair is required. It is thus important to be sensitive to the client's financial circumstances and balance against essential repairs.
6. Likelihood and timing of funding availability - grants & charitable, and 'trimming the cloth' accordingly.
7. Economic factors around energy efficiency: current outlay against savings made by, for example, upgrading the heating boiler or improving the insulation values of the property. Carefully considered advice to client would be required.
8. After the recommendations are discussed with the client (and in conjunction with the Caseworker), a course of action is agreed and a planned programme of repair is compiled (see Appendix 4).
9. As discussed above, an annual maintenance update survey would be undertaken by the HMO and run concurrently or be a standalone service for a 5 year cycle period.
10. In association with the annual maintenance work undertaken by the Handy Person, this annual inspection would be undertaken as a follow up to the initial survey, in order to monitor potential changes especially in the condition of the external fabric. Incipient problems would be identified and tracked annually and may be added to the maintenance programme if advised by the Officer.
11. The immediate repairs identified and agreed with the client, could, if they are of a minor nature and cost, be incorporated into cover plan charges — outlined in **Section 4** of the Guide. This information is

recorded in that section of the programme documentation and distinguishes it from potentially more complex and costly works agreed to be privately funded by the client, which would fall outside the remit of a Cover Plan.

12. The remaining sections of the planned programme incorporates agreed works to be undertaken in the first year; second and third year; and to be completed within 5 years.
13. Each section records, where applicable, the dates of technical inspections, maintenance tasks undertaken and works completed, in order to provide an audit for the maintenance of the property.
14. At the end of the 5 year cycle, the client would be able to sign up to further 5 year cycles. A revision of the previous audits at the end of each cycle would be discussed with the client and a future programme put in place.

6. KEY BENEFITS OF THE SCHEME

6.1 Key benefits of the scheme are:

- In-house complimentary partnership solutions that will deliver a client centred, needs led housing service tailored to support the independence and wellbeing of older people in their own homes.
- The ability to enable a client to make informed choices at the earliest opportunity and plan for the future.
- A good quality, cost effective service, that combines a social care expertise of working with older people with reliable trustworthy and qualified, 'badged' operatives.
- A timely service that is responsive to client aspirations.
- Regular scheduled contact with the older person, sensitive to changing *personal* and *environmental* circumstances and providing a 'denta-plan' approach to home maintenance.
- The potential to address non-mainstream maintenance services that impact on health and wellbeing, e.g. garden maintenance and decorating.
- A gateway to wider repair, care, advice and health-related services part.
- Good, high quality and effective advice and intensive support.
- A framework for emergency cover.

6.2 Strategic Benefits of the Scheme

The National Policy Context requires joint working and innovative partnerships that develop new service delivery models. The requirements of a radically altered demographic and the challenges for housing in an ageing society are profound:

- By 2030 25% of the UK population will be over 60 years of age (the ageing profile in Wales will be greater);
- For every 4 babies born today, 1 will live until they are 100.

The ability of this proposed model to address key strategic policies of the Welsh Government is significant:

WAG Policy	Policy Objective
Improving Lives and Communities	People's needs change throughout their lives. One thing is constant; the need for a safe and secure home. Some people need support. In later life, many people need help to live independently for as long as possible.
The Older Persons' Strategy	'A strategy to develop more effective prevention and rehabilitation services should be developed by the Welsh Assembly Government with all of its care partners that ensures the maximum possible degree of independence is restored and maintained, and that inappropriate hospital stays are avoided'
Fulfilled Lives, Supportive Communities	Services should put the citizen at the centre of what they do and focus on earlier prevention rather than concentrating on those with the most intense needs.
Living well – Living Independent Lives	We will develop partnerships that can mobilise and deliver the widest range of positive outcomes to meet the housing solutions required for an ageing society.
National Service Framework for Older People	A range of enabling, community based services are available to intervene promptly and effectively when older people's independence is threatened by health or social care needs, with the aim of challenging dependency and maximising well-being and autonomy.

- 6.3 The over-arching thrust within this policy environment, and a context of immense public finance deficit, is *spend to save* and the development of effective preventative services.
- 6.4 Poor unsuitable housing conditions experienced by older people might force some into residential care and prevent them leaving hospital and/or residential care. Thus there are potential cost savings in health and social care spending. Such initiatives can also help to sustain home ownership.

The social responsibility for paying for care, which is one symptom of the opportunity for positive ageing, is predicated by the need to support older people to live in their own homes for as long as they chose.

- 6.5 The Home Maintenance 50+ Scheme aims to encourage and enable older people to take responsibility for their homes. This in turn can help to alleviate the cycle of dependency on council intervention through grant-aid and other initiatives.

Preventative home maintenance actively seeks new ways of promoting early home maintenance enabling older home owners to routinely invest in their homes before they fall into substantial disrepair.

- 6.6 With this in mind and to ensure older people are not discriminated against and treated as a problem or burden, but given every opportunity to age positively, the Welsh Government has sought to address inequality and fair access to services. The Equality of Opportunity Committee has produced its report, '**Still Waiting: Home Maintenance and Adaptations Services for Older People in Wales**', which addresses some of the specific housing needs of older people. One of its recommendations is:

'The Welsh Assembly Government, in consultation with older people, develops guidance on how information in relation to home maintenance and adaptation services is provided for older people.'

The pilot being developed through Bridgend Care & Repair is the designated good practice model and is being monitored by WAG.

Cyclical Maintenance Survey

Personal Details		Type of Accommodation		Benefits	
Client Name: Mrs A Jones		Owner/occupier		Y	Income Support
Partners Name: N/A		Private tenant			Housing Benefit
Address: 1 High St		LA tenant			Council Benefit
Anytown		RSL tenant			Ind. Injuries/Disablement Benefit
Bridgend		Other			Pension Credit Guarantee
Post Code: CF.....	Ethnic Origin:				Child Tax Credit
Tel. No:	Gender: Female	Number of Adults in the Household	1		Working Tax Credit
					Attendance Allowance
Property type: Mid terrace	Construction type: Solid stone; cavity wall				Disability Living Allowance
Date of Survey: April 4 2012					War Disablement Allowance
Technical Officer: D. Griffiths					

Questions to Client

Do you feel you can access your property inside/outside without the need for small/big adaptations? Yes / **No**

Is the house warm enough with all rooms heated? Yes / **No**

Has the gas/ solid fuel boiler been serviced in the last year? Yes / **No**

Is 10% or more of your income being spent on fuel? **Yes** / No

Are there any other issues which concern you with regards to your property?

Damp smells in kitchen & bathroom

Draughts to windows & doors

Access to bath

General Section

Electrical <i>[See also comments of individual room components]</i>	Yes/No/N/A	Code No.	Condition	Life Span	Comments	Action/ Recommendation
Is repair/ re wire required?	Yes	E1	No obvious signs of deterioration	Limited	Approx age 20+ years	
Does the consumer unit require upgrading?	Yes	E2				
Is an electrical report required?	Yes	E3				
Heating						
Is there an adequate heating system? Specify current system	Yes	H1	Fair for age	5 + Years	Current System: Gas Baxi back boiler. Approx 20 years old Not regularly serviced	Commission report
If gas heating, is an inspection required by a Gas Safe Engineer?	Yes	H2				
If solid fuel, has the chimney been swept? If so approximately when?	N/A	H3				
Is there adequate ventilation	Yes	H4	OK	15 years +		
Is a central heating programmer provided?	No	H5			System workable for client	
Asbestos						
Is there evidence of asbestos?	No	A1				
If so what action is required? Immediate—protect area/ non urgent—report required/ long term removal	N/A	A1				

Disabled adaptations/ Access	Yes/No/N/A	Code No.	Condition	Life Span	Comments	Action/ Recommendation
Have adaptations been fitted? If Yes specify/ do they require upgrading?	Yes	DA1	Fair	5 years +	Grab rail adjacent to wc	
Are additional fittings adaptations recommended? If yes, specify	Yes	DA2			Client struggles to get into bath. Would benefit from a level access shower	OT referral
Is an Occupational Therapist's assessment required?	Yes	DA3				
Insulation						
Is there adequate insulation provided to hot water cylinder?	No	I1	N/A	N/A	No jacket provided	Provision for required
Is there the correct level of loft insulation?	No	I2	None	N/A	Required to main roof. Flat roof to extension, so cannot be determined	Provision for required
Do the walls have sufficient insulation incorporated?		I3			Terraced solid stone walls to main house—therefore N/A Cavity wall ground floor extension to rear kitchen/ bathroom—approx 20 years old, probably does not comply with current regs. Cavity fill an option	Cavity fill option if required by client
Is the pipework suitably lagged?	No	I4	Poor	2-3 years		Upgrade
Is boarding provided to support cold water storage tanks?	Yes	I5	Ok	15 years +		
Structural						
Roof structurally sound?	Yes	S1				
Floors structurally sound?	Yes	S2				
Walls structurally sound?	Yes	S3				
Other: structurally sound?	Yes	S4				

Assistive Technology	Yes/No/N/A	Code No.	Condition	Life Span	Comments	Action/ Recommendation
Are smoke alarms fitted? If yes, state hard wired or battery operated & numbers & positions	Yes	AS1	Sound		Battery operated	
Are there CO2 detectors fitted? If yes, state numbers & positions	No	AS2				Refer to small projects
Are there temperature cold detectors? If yes, state numbers & positions	No	AS3				Refer to small projects
Are there lighting/movement sensors fitted? If yes, state numbers & positions	No	AS4			Not required	

Internal Condition: Hall and Staircase

Component	Code No.	Material / Type	Condition	Life Span	Comments	Action/ Recommendation
Front door	F1	Hardwood/ single glazed	Fair	5year+		
Internal door	D1	Soft wood Georgian style glazing	Sound	10 years+	No safety glass to door	
Window	W1	N/A				
Staircase	St1	Softwood	Fair	15 years +	3 to 4 treads to be secured	Repair in in cover plan possibly
Balustrade	B1	Softwood, ornate spindles	Fair	15 years +		
Handrail	H1	Softwood, mopstick	Good	15 years +		
Radiator	R1	Stelrad single 1500L	Fair	10 years +		
Wall structure	Ws1	Solid stone	Sound	30 years +		
Wall finishes	Wf1	Original mortar	Fair	10 years	Covered by wall paper. Solid, no signs of hollowness	
Floor structure	Fs1	Concrete	Sound	30 years +		
Ceiling	C1	Lath & plaster	Fair	10 years	Covered by wall paper. Solid, no signs of hollowness	

Falls prevention:	Yes/ No N/A	Code No.	Condition	Life Span	Comments	Action/ Recommendation
Adequate Lighting?	Yes	FP1				
Is there a light switch at the top and bottom of the stairs?	Yes	FP2				
Are the stairs clear of clutter including no article of furniture at top and bottom?	Yes	FP3				
Is there a window at the bottom of the stairs? If yes what guarding provided?	No	FP4			Standard for this property type	
Are there any trailing wires?	No	FP5				
Energy Efficiency						
Has the radiator been fitted with a TRV?	No	EE1				Recommend to be fitted
Is a room stat fitted?	No	EE2				Recommend to be fitted
Dampness						
Is there evidence of damp? If Yes specify	No	DN1				
Security						
Has the front door been fitted with security measures ?	Yes	SE1			Chain	Fit deadlocks
Has the window been fitted with security measures?	No	SE2				Fit locks

Internal Condition: Lounge

Component	Code No.	Material / Type	Condition	Life Span	Comments	Action/ Recommendation
Patio / french door	F2	N/A				
Internal door	D2	Solid SW	Fair	5year+		
Window	W2	Softwood	poor	2-3 years	Frames & top opening light beginning to rot	Replace in 2-3 years
Radiator	R2	Stelrad single 1500L	Fair	10 years +		
External vent	V1	Plastic	good		See heating H4	
Wall structure	Ws2	Solid stone	Sound	30 years +		
Wall finishes	Wf2	Original mortar	Fair	10 years	Covered by wall paper. Solid, no signs of hollowness	
Floor structure	Fs2	Concrete	Sound	30 years +		
Ceiling	C2	Lath & plaster	Fair	10 years	Covered by wall paper. Solid, no signs of hollowness	

Falls prevention:	Yes/ No N/A	Code No.	Condition	Life Span	Comments	Action/ Recommendation
Adequate Lighting?	Yes	FP6				
Are carpets/rugs loose/worn?	No	FP7				
Are there any trailing wires?	No	FP8				
Electrical						
Is the electric socket provision adequate?	No	E4			Client is content with current provision	
Energy Efficiency						
Has the radiator been fitted with a TRV?	No	EE3				Recommend to be fitted
Is a room stat fitted?	No	EE4			See Hall, Staircase	
Dampness						
Is there evidence of damp? If Yes specify	Yes	DN2			Evidence of rising damp to	
Security						
Has the external door been fitted with security measures ?	N/A	SE3				
Has the window been fitted with security measures?	No	SE4				Fit locks

A full copy of this sample survey can be found on the website. Go to:

www.careandrepair.org.uk - good practice guides

Job Description

Title: Agency Home Maintenance Officer

Responsible to: ()

Grade:

Overall Purpose

To provide home maintenance advice and technical services to enable older homeowners (50+) to choose appropriate solutions to maintain, repair and adapt their homes both in the immediate, medium and longer term.

Specific Duties

Strategic Responsibilities

To provide progress reports on the development of the Home Maintenance Cyclical Service to the Project Group and Board of Management as required.

To promote the Home Maintenance Advice/ Cyclical Maintenance Service within the County Borough by attending local forums and publicity events.

To work effectively with local partner organisations on a local level and develop a comprehensive range of information relating to home maintenance.

To explore the feasibility of providing a Home Maintenance Cyclical Service with the provision of a twenty-four hour emergency repair service being made available to older people within the County Borough.

Specific Duties

To provide technical advice and assistance to enable older people to live in their homes as independently as possible.

To carry out Healthy Homes Checks to identify repair and safety issues and environmental risk factors within clients homes and within cartilage of their property

To arrange urgent intervention and/or preventative measures where potential risk is identified that will involve accessing a range of other services through the Agency, local authority, voluntary and or private sector services.

To provide technical advice and cyclical home maintenance reports to enable older people to choose solutions that allow them to effectively plan their home maintenance and any future repairs required to their home in the immediate, medium and on a longer-term basis.

To prepare drawings, specifications and obtain estimates and quotations from contractors as necessary to progress individual cases.

To obtain and collate information in relation to local tradesmen in order to develop and manage the Agency's list of Approved Contractors.

To develop a range of information leaflets linked to Home Maintenance that can be distributed to older people.

To work closely with the Agency's Handyperson Service and to hold regular case reviews with the team in order to monitor the progress of individual cases.

To monitor building work in line with agreed practice and policy of the Care and Repair Schemes.

DEVELOPMENT

To keep up to date with developments in the technical field and to inform other members of staff and attend training courses as appropriate.

GENERAL

To contribute to the achievement of the Agency's objectives in improving the overall service to customers by participating in working groups and project teams.

To assist in the production of reports for meetings inside and outside the department.

To adhere to the Agency's Equal Opportunities policy and procedures within own work and to generally support and promote the Equal Opportunities Policy.

To adhere to health and safety legislation and the Agency's policies & procedures.

To liaise effectively with people at all levels both internally and externally.

To undertake any other duties requested by the Line Manager, which are consistent with the overall purpose of the post.

Note: No job description can cover every issue which may arise within the post at various times and the post holder is expected to carry out other duties from time to time which are broadly consistent with those of this document.

Component / Services	Location	Code No. 's from survey	Recommendations	Approx cost implication at time of report [£]	Response			
					Immediate Repair/ Action	Part of Planned Maintenance Programme		
						Repair in 1st year	Repair in 2 to 3 years	Repair in 5 years
Electrical								
Repair/ rewire								
Other works: specify	Hall	E2	Check consumer unit / general upgrade	150.0—350.0	Yes			
Electrical report required	General	E3		75.0	Yes			
Heating								
Upgrade current system								
Install new system								
Inspection/report required by qualified heating engineer	Back boiler-Lounge	H2	Service recommended	150.0	Yes [under cover plan]			
Asbestos								
Protect area/ report required/ longer term removal			None—N/A					
Disabled Adaptations								
Fittings requiring upgrade/ replacement			None—N/A					
Occupational Therapist report required	General access/ bathroom	DA3		None				
Fittings/ adaptations recommended [subject to OT approval]			Minimum: wet room installation via grant aid. Possible ramp access	None		Yes [subject to LA grant timetable]		
Insulation/ Energy efficiency								
Upgrade/renew to walls/roof/floor voids	Extension	I3	**Cavity fill option if required by client	** 500.0			Yes	
Upgrade/renew lagging	Landing cupboard	I1						
Fit TRV's to radiators	General	EE1/3/4/7 10/12/14/1 6/18/20/24						

Fit new insulation: specify							
Other: specify	Hall	EE2	Room Stat	150.0			
Structural							
Outline repairs required			None				
Structural report required			None				
Assistive Technology							
Fit/upgrade smoke alarms							
Fit/upgrade co2 detectors			Refer to small projects				
Fit/upgrade temperature cold detectors			Refer to small projects				
Fit/upgrade lighting/movement detectors							
Internal General repair: state components							
Windows	General	W2/3/4/6/7 /8/9/11				Yes	
Floor structure	Bed 1	Fs7			Yes [under cover plan]		
Plastering	Bed 1	Wf7	In conjunction with external pointing below		Yes		
Amenities/ Plumbing							
kitchen	None						
Bathroom	None						
Check over flows, waste pipes	External general				Yes[under cover plan]		
Falls prevention/safety measures							
Upgrade artificial lighting							
Repair floor finishes	1 st floor		Secure floorboards		Yes[under cover plan]		
Alleviate trailing wires							

