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<b>Policy Name</b>	<b>Stage 3 Adaptations</b>
<b>Policy Author</b>	<b>Property Manager</b>
<b>Approved by Sub Committee</b>	<b>May 2024</b>
<b>Approved by Management Committee</b>	<b>May 2024</b>
<b>Latest date of Next Review</b>	<b>May 2029</b>

West Whitlawburn Housing Co-operative will provide this policy on request at no cost, in larger print, in Braille, in audio or other non-written format, and in a variety of languages. Please contact the office.

**Registered with the Scottish Housing Regulator No. 203**  
**Registered Charity No. SCO38737, VAT Registration No. 180223636**  
**Registered society under the Co-operative and Community Benefit Societies Act 2014**



## **1. Introduction**

- 1.1 West Whitlawburn Housing Co-operative (WWHC) recognises that a number of its tenants will require adaptations to their homes in order to provide an enhanced quality of life and allow them to continue to live more comfortably in their homes for as long as possible.
- 1.2 Adapted properties help the Co-operative maintain a stable, sustainable and inclusive community. Adaptations make properties more accessible and usable for people to allow them to cope with advancing age, disability or caring responsibilities and thereby enable them to maximise their independence in their own home.
- 1.3 The Co-operative is committed to carrying out adaptations to properties which comply with the criteria set out in this policy and with those included in the Co-operative's other relevant policies and procedures, and guidance from the Scottish Government. WWHC will comply with all legislation relevant to this Policy.

### 1.4 The Scottish Social Housing Charter

WWHC aims to meet its legal obligations and The Scottish Housing Charter Outcomes.

#### Outcome 1: Equalities

Every tenant and other customer has their individual needs recognised, is treated fairly and with respect and receives fair access to housing and housing services.

#### Outcome 11. Tenancy Sustainment

Social landlords ensure that:

Tenants get the information they need on how to obtain support to remain in their home; and ensure suitable support is available, including services provided directly by the landlord and by other organisations.

### 1.5 Regulatory Standards

Standard 2 The RSL is open and accountable for what it does. It understands and takes account of the needs and priorities of its tenants, service users and stakeholders and its primary focus is the sustainable achievement of these priorities.

## **2. Policy Aims**

WWHC aims to be responsive to the particular needs of applicants and the changing needs of existing tenants. We will adapt our properties appropriately to meet those needs and maintain comprehensive information about the adapted properties that we own.

When undertaking adaptations, WWHC aims to:

- provide a prompt, efficient and cost-effective adaptation service
- support the independence and dignity of tenants by undertaking adaptations to their existing properties so that they can sustain their tenancies
- ensure that WWHC carries out adaptations that are appropriate to the tenant's needs
- acknowledging that in some instances construction type and financial constraints may prohibit the successful adaptation of a property and in such circumstances refer the tenants to our Housing Management Team to provide appropriate housing options advice
- ensure that WWHC makes best use of its housing stock and resources available by allocating vacant adapted houses to tenants with similar medical needs where possible
- operate an effective monitoring system, including audit trails and reporting systems

The Property Manager has responsibility for overseeing the implementation of the Stage 3 Adaptations. The PA&R Sub Committee will receive regular updates on the implementation of the Stage 3 Adaptations Policy so that they can have assurance that it is operating effectively in practice.

## **3. Funding**

- 3.1 WWHC receives Stage 3 grant funding from the Scottish Government, to assist with the provision of aids and adaptations to tenants who have been identified as requiring assistance, in the form of permanent medical adaptations, to allow them to remain in their home. Expenditure on medical aids and adaptations varies from year to year, based upon the needs of individual tenants and the availability of grant funding.
- 3.2 A bid for funding for Stage 3 adaptations will be made to the Scottish Government on an annual basis in line with the guidance current at the time.
- 3.3 It will be the joint responsibility of the Property Manager and Head of Housing Services to assess the likely future need / demand for

adaptations based upon current requirements and historic expenditure levels.

- 3.4 The Property Manager will be responsible for drawing down grant funding in line with guidance and will regularly monitor the demand and expenditure on adaptations throughout the year.
- 3.5 Where it is likely that additional grant may be needed an application should be made as soon as possible.
- 3.6 When the Adaptation grant has been exhausted and additional grant is unavailable, we may create a waiting list of approved adaptations to take priority the following financial year. The waiting list will use the priority criteria provided on the referral and completed when additional funding becomes available.
- 3.7 Where there is no funding available, the Co-operative may choose to allocate resources for medical adaptations from its own resources where there is sufficient budget provision and a clear case for such expenditure. Any such expenditure would require Management Committee approval.

#### **4. Referrals**

- 4.1 WWHC will assist tenants with completion of an Occupational Therapy Referral Form within 7 working days
- 4.2 Alternatively, the tenant may contact the Occupational Therapy Department at South Lanarkshire Council to arrange for an assessment to be carried out.
- 4.3 Joint visits will be held with the Occupational Therapist where this is considered appropriate in terms of complexity.

#### **5. Assessment and Prioritisation**

- 5.1 The Occupational Therapist will complete a CL1 Referral Form, which will clearly recommend the type of work required to meet the tenant's needs.
- 5.2 The Co-operative recognises the expertise of the Occupational Therapists and will prioritise cases based on the information provided in their referrals. Applications are assessed and points/categories awarded on factors such as social, medical, independence and risk.

The Priority is determined by the total amount of points awarded (score) and category as follows:

<b>Priority Statement</b>	<b>Priorities Score Range</b>
• Critical	12 + points (36 max points)
• Substantial	7-11 points
• Moderate	3-6 points
• Low -	1-2 points
• N/A	0 points

Referrals received from an appropriate Health Professional which are not measured in level or risk, score or priority and therefore will immediately fall to the bottom of our waiting list. In such cases, tenants should be encouraged to refer for an occupational therapy assessment.

- 5.3 The Property Manager will maintain a list of required adaptations held in priority order.
- 5.4 Tenants can appeal against their position on the list by contacting the Occupational Therapist involved. The Co-operative will update tenant's positions on the list subject to updated information from the Occupational Therapist.
- 5.5 Should a tenant's condition change while on the waiting list, or they transfer to another property, which has not been suitably adapted, their waiting list position will be reviewed following an updated referral submitted by the Occupational Therapist.
- 5.6 In circumstances where a tenancy is ended, the Housing Officer will advise the Property Manager and the case will be removed from the list.

## **6. Adaptation work**

- 6.1 WWHC will endeavour to carry out adaptation work requested by the Occupational Therapist that meets the long-term needs of its tenants.
- 6.2 WWHC recognises that there may be situations where it is not considered appropriate to carry out some forms of adaptation work due to location of the property, building type or where the tenant is likely to be offered a transfer.
- 6.3 When such cases arise the Property Manager will advise the Occupational Therapist concerned and arrange a meeting with all parties to discuss options, which could include a transfer or

reassessment by the Occupational Therapist. Each set of circumstances will be considered on its own merits.

## **7. Procurement**

- 7.1 The Property Manager will be responsible for appropriate submissions to the Scottish Government and ensure that all work is carried out from the prioritised list where funds are available
- 7.2 Adaptations will be classified as either minor or major works and will be undertaken by the Co-operative's current contractors and/or specialist contractors when necessary.
- 7.3 Consultants will be appointed as required in line with WWHC's Procurement Policy.
- 7.4 Tenders for Stage 3 works will be issued in line with WWHC's Procurement Policy as required.
- 7.5 The Property Manager will have discretion to progress works where a specialist contractor is required or where the ongoing responsibility will fall into any maintenance agreements in place.
- 7.6 The Property Manager will be responsible for ensuring the supervision and monitoring the performance of the contractor during work. WWHC will carry out a post-completion inspection of all major adaptations to ensure that they have been carried out to the satisfaction of the Co-operative. Post inspections of minor adaptations may also be undertaken.
- 7.7 H.M Customs & Excise have confirmed that VAT is not applicable to these adaptations and Property staff will ensure that the appropriate paperwork is completed and passed onto Contractors to reflect this.
- 7.8 Details of completed work will be logged on the Co-operative's Asset Management systems by Property staff.
- 7.9 Details of completed work will be provided to the Occupational Therapist.

## **8. Tenant Consultation & Satisfaction**

- 8.1 Property staff will be responsible for tenant liaison throughout the contract and arranging visits as required. On completion of works, a Tenant Satisfaction survey will be sent to the tenant to seek their views on the overall adaptation process and finished works.

## **9. Allocation of Adapted Properties**

- 9.1 RSL's must demonstrate value for money in the delivery of housing adaptations
- 9.2 When an adapted property becomes available for let, this will be allocated in line with current allocation policy and will be the responsibility of the Head of Housing Services.

## **10. Monitoring and Reporting**

- 10.1 The PA&R Sub Committee will be updated on progress with cases on a quarterly basis.

The report will update on:

- number and type of adaptations requested and approved
- completions in the year
- number of households currently waiting for adaptations to their home (ARC indicator)
- total cost of adaptations completed in the year by source of funding
- average time to complete adaptations

The Co-operative will also monitor tenant's satisfaction and whether the adaptation has met their requirements.

## **11. Equalities**

- 11.1 We are committed to ensuring equal opportunities and fair treatment for all people in our work. In implementing this Policy, we will provide a fair and equal service to all people, irrespective of factors such as gender, race, disability, age, sexual orientation, language or social origin, or other personal attributes.
- 11.2 An equality impact assessment has been carried out and is appended to this policy.

## **12 Policy Review**

- 12.1 The Management Committee will review the Policy after five years or sooner if there are changes relating to guidance from the Scottish Government and/or good practice.