

# Housing Learning & Improvement Network

The Health and Social Care Change Agent Team (CAT) was created by the DoH to improve discharge from hospital and associated arrangements. The Housing LIN, a section of the CAT, is devoted to housing-based models of care.



## Charging for Extra Care Sheltered Housing Services in Salford

An example of how Extra Care tenants in Salford City Council benefit from joint working, information sharing and use of technology, as Supporting People subsidy and Fairer Charging assessments are put into practice.

**Local Authority:** Salford City Council

**Key partners:**

Social Services contracts team  
New Prospect Housing Ltd.  
St Vincent's Housing Association  
Housing 21  
Supporting People  
Housing Benefits  
Welfare Rights service

**Lead contact:**

Julie Dodd, Supporting People, Salford City Council, Crompton House, 100 Chorley Road, Swinton, Manchester M27 6ES  
Tel. 0161 922 8766  
E-mail: [Julie.Dodd@Salford.gov.uk](mailto:Julie.Dodd@Salford.gov.uk)

**Aim**

To implement the council's charging policy in a fair and consistent way for Extra Care tenants and to establish an effective process for passporting tenants with Housing Benefit onto free support services and for assessing charges for care and support services in Extra Care Sheltered Housing Schemes.

## Background

Salford has four Extra Care sheltered Housing schemes, where tenants receive a combination of care and support services. This document is about charging for care and support services in those schemes.

- Charging for Care - Salford commenced a programme to implement Fairer Charging for non-residential community and social services in 2002. Salford's charging policy is based on national Fairer Charging principles and guidance and has been developed through consultation with Social Services, Welfare Rights, Supporting People and service users.
- Paying for Support - Supporting People was implemented in 2003; in accordance with national guidance, service users on Housing Benefit receive free housing-related support services; other service users may request a charging assessment of what they should pay for their support. Service users who receive both care and support should have just one assessment to produce one charge for both services.

## Extra Care Review Group

Salford planned to complete Fairer Charging assessments for Extra Care Sheltered Housing tenants by 2004. However, as charging assessors visited tenants, several charging policy anomalies began to emerge. Eventually the issues became of such concern that a review group (a sub group of Salford's Charging Policy group) was set up to look at the following:

- What is eligible to be funded by Supporting People and what falls under Community Care?
- How is the care/support split reflected in dependency bands?
- The application of charging policy to Extra Care schemes
- How to move to the desired position.

## Issues and Challenges

The charging assessors identified from their initial visits the following issues:

- How much of the total charge is support and how much is care?
- Every tenant's service is different, even within the same dependency level
- Tenants can tap in and out of services – how do we fund or charge for this?
- Can tenants opt out of services (and therefore charges?)
- Do we charge when a third party provides care and support?
- Do we charge during temporary absences?
- Were existing tenants transitionally protected when sheltered schemes were converted to Extra Care schemes?

- Do support charges apply per tenancy or per individual? (Original resident warden charges were per tenancy)

### **Care/Support Split**

Fairer Charging guidance says that no service user must be charged more than the cost of their service. Extra Care services are a mixture of housing-related support (eligible for funding by Supporting People) and care services (funded by Social Services). To assess a person's charge for a service, we need to know what that service costs and of this, what is the split between support and care. If a service user is receiving Housing Benefit, Supporting People will pay for their support, but their charge for care services still needs to be assessed.

### **Supporting People Eligibility Criteria**

The group began by considering what activities are eligible for Supporting People grant. Grant Conditions allow Supporting People grant to pay for "housing-related support" but do not define what this is. It is up to each local authority to set its own eligibility criteria and decide what services the grant will be spent on. Salford has resisted drawing up a rigid list of eligible activities, but takes a holistic view of the services provided and the overall aims and intentions of schemes. Within that approach, it is possible to look at the range of tasks and activities in Extra Care schemes and identify things that definitely are and are not housing related support. The group found that one obstacle to doing this was the inconsistent terminology used by different staff when completing support and care plans and daily logs.

### **List of Support Activities**

To try to generate consistent use of terminology, the group produced a list of tasks that are classed as support rather than care (see Appendix 1), on which the link Social Worker bases each tenant's support plan. This makes it easier to assess the balance of care and support and provides a structure for measuring how staff time is split between care and support.

### **How much is Support, How Much is Care?**

Having identified a broad range of tasks and decided what constitutes support and what is care, the group turned its attention to how the cost of Extra Care services should be split between support and care. The group looked at individual care and support plans and at daily logs. The difficulty with this is that every tenant's services are different as they are tailored to their needs. Therefore some sort of model was needed to assess charges.

### **Dependency Bands**

Every Extra Care tenant is assessed by the link Social Worker as low, medium or high dependency. The group devised a charging model based on dependency levels.

Because every person's service is different, the group moved away from looking at individual care and support plans to look at the criteria for each dependency level (see Appendix 2).

The group agreed that people assessed as low dependency generally receive no care services within the Extra Care scheme, therefore whatever charge is calculated for this level, it is 100% support.

The group then considered the differences between medium and high level and concluded that there is a shift in the balance from support to care as a person moves from medium to high dependency. The group agreed that at the medium level, support is greater than care, but at the high level care is greater than support.

The group agreed that the amount of time spent on support increases with each dependency level, because of the additional prompting, enabling and monitoring required. It was noted that encouraging and supervising tenants to do tasks (support) often takes longer than actually doing tasks for tenants (care).

### **24-hour Cover – is it Care or Support?**

Although it is possible to classify most tasks and activities as either care or support, staff are on site 24 hours a day and a decision needs to be made about time not spent providing direct services and whether this should be allocated to care or support. Salford decided that it was reasonable to split all staff time, including sleep-ins and waking nights between care and support, in whatever proportion was calculated for each dependency level.

### **Salford's Care/Support split**

After considering individual care & support plans, daily activity logs, and the changing nature of services as a person moves through the dependency levels, the following was agreed:

<b>Level</b>	<b>Support</b>	<b>Care</b>
Low	100%	0%
Medium	60%	40%
High	40%	60%

### **Calculating Charges**

Having agreed the percentage split between care and support, the group needed to identify what the overall charge was for each dependency band, so it could be apportioned between care and support. It was agreed that the charge would be based on the rolled up cost of the service, taking into account the following:

- Contract value with care/support provider
- Link Social Worker post
- Link Housing Worker post

- Permanent waking nights (as opposed to sleep-ins plus spot purchases)
- On-costs (Social Services administration and overheads)
- Annual Inflationary increase
- Maximum occupancy at desired dependency profiles.

When the percentage splits shown in the table above were applied to the service cost, this produced a matrix of unit costs for each dependency level. A reality check shows that the calculated amount for low dependency is comparable to the average unit cost for sheltered housing in Salford, and the amount for high dependency is half that of the lower rate of residential care for the elderly in Salford.

### Putting the Model into Practice

Having agreed a charging model, the group then considered how to move towards the desired position and what was required to make passporting and assessment processes simple and easy for tenants. The group defined a process that relies on:

- A Care & Support agreement for Extra Care tenants
- Shared database of Extra Care tenants
- Regular exchange of information
- Shared access to Housing Benefit and Social Services computer systems
- Salford's Fairer Charging calculator

### Care & Support Agreement

The group drafted and consulted on an agreement for tenants to sign when they move into Extra Care Sheltered Housing. The agreement clarifies Salford's charging policy and issues such as:

- **Tenants can tap in and out of services** – the link workers meet the scheme managers every week. If a tenant has been accessing additional services for several weeks, the link Social Worker will reassess them to see if their dependency level has changed. Tenants who access additional services on a temporary basis are not charged for extra services.
- **Can tenants opt out of services?** People are offered Extra Care accommodation on the basis that they have been assessed as needing the services it provides. If tenants choose not to receive services or choose a third party to provide them, they must still pay the assessed charge for their dependency level.
- **Do we charge when a third party provides care and support?** The support agreement means that new tenants would pay the charge for the dependency level they were assessed at, but existing tenants who already have third party care in place pay only the charge for low level dependency.
- **Do we charge during temporary absences?** Salford's charging policy does not charge people for services if they are temporarily absent for a whole week or

more. For example, if a person goes into hospital for a week or more, Supporting People subsidy would continue to pay for their support, but any assessed charges for Extra Care would not be collected.

- **How were existing tenants transitionally protected?** Salford remodeled existing sheltered accommodation into Extra Care schemes. Existing tenants will never have to pay more for their support than the charge they were paying at the time for their resident warden.
- **Is the charge per unit or per person?** Although the old resident warden charge was per unit, care and support charges are per person because each member of a couple has their own services relating to their own dependency level.

## **Shared Database**

One of the obstacles to implementing charging for Extra Care was the lack of a single database holding the details required by all the partners. The group created a spreadsheet, which holds details of clients' names, addresses, date of tenancy, dependency level, Housing Benefit status, Supporting People subsidy, transitional protection and charging assessment. The spreadsheet is updated every month by Supporting People and sent to charging assessors with changes highlighted and notes of assessments required.

## **Information Exchange**

The passporting and charging process relies heavily on the regular exchange of information between the partners. The link Housing worker notifies the Supporting People team and the Charging Assessment team of tenants joining and leaving the schemes and of people who have changed dependency level. This information is essential to keep the database accurate and up to date and to ensure that assessed charges reflect people's current dependency level.

## **Shared Access to Systems**

Supporting People and charging assessors need quick and accurate information in order to passport tenants to free support services and to assess charges correctly. This is achieved in Salford by having access to the following systems:

- Housing Benefit - avoids tenants having to provide evidence of Housing Benefit and allows Supporting People to monitor progress of a claim without having to send reminders to tenants. Automated reports notify Supporting People when HB starts or ends for supported tenants. Consent is sought from every tenant to exchange information with Housing Benefit for the purposes of paying subsidy.
- Social Services – information on care/support package, costs and address and personal details.
- New Prospect (landlord) rents system – information about tenancies starting and ending and housing costs.

## **Fairer Charging Calculator**

Salford has devised a tool which contributes to the successful implementation of Fairer Charging in Salford. The tool is based in Excel and is used to:

- refer clients for a charging assessment
- assess housing costs and disability related expenditure
- calculate what a client should pay for care and support
- notify the client of their charge
- collect information for benefit checks
- assess Housing Benefit entitlement
- record the details of every assessment

The tool reduces the need for paper records and speeds up the assessment by collecting all the information required in one place, avoiding duplication, allowing information to be exchanged electronically. The calculator performs all the calculations required to assess a person's charge. The calculator was cited as good practice by the Beacon Panel and Salford are willing to share it with other authorities under the Beacon Councils scheme. For more information please see Appendix 3.

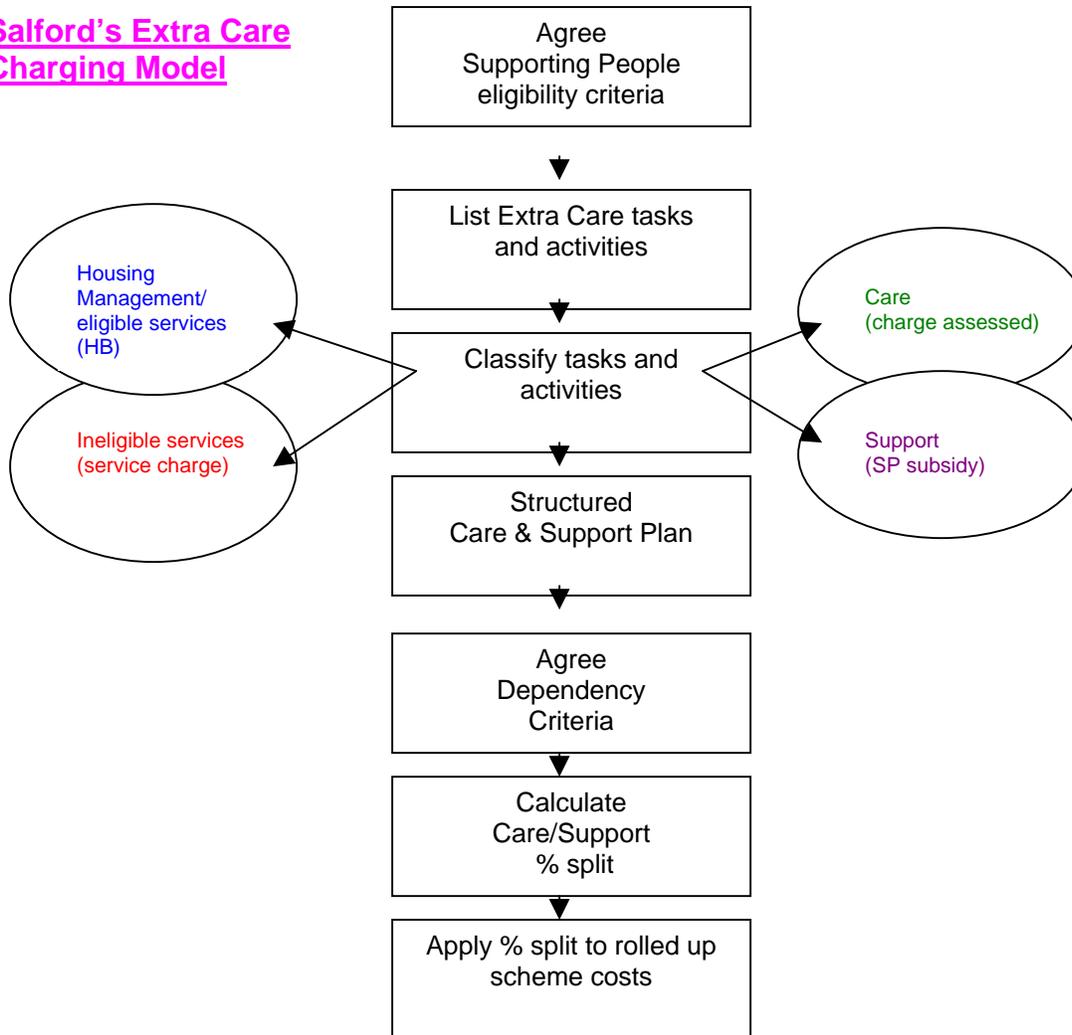
## **The Charge Assessment**

Charge assessments are conducted face to face in client's homes and in 95% of cases the client is informed of their charge at the conclusion of the interview. A transparent and robust appeals system is in operation for those who disagree with their charge.

The electronic transfer of information speeds up the assessment process and the Fairer Charging calculator ensures that all relevant parties are provided with the same information in an easy to read format.

A benefit check is an integral part of the assessment and all charging assessors are, CLS quality mark, approved welfare benefit advisers. Missing benefit entitlement has been identified for more than half the clients assessed; in 2003/2004, £385,000 of missing benefit was claimed for service users by charging assessors. This approach has led to a high level of satisfaction amongst service users, with 88% of those who responded to customer questionnaires saying they understood how their charge was calculated (the remaining 12% felt that it was too complicated) and 100% saying they felt all their needs had been taken into account.

## Salford's Extra Care Charging Model



## Learning Points

- Joint working is essential to agree and successfully implement a model for paying for and charging for Extra Care services.
- Drawing up a list of Extra Care tasks and activities promotes common terminology and provides a structure for separating care from support and for measuring the split.
- Having a care & support agreement helps the tenant understand what services they are paying for and clarifies when charges will and won't apply.
- Councils can help tenants access Supporting People subsidy by sharing information about Housing Benefit (with clients' consent)
- Councils can use simple technology to make Fairer Charging more than an assessment of what a person should pay. Salford's Fairer Charging calculator ensures that charges are assessed quickly, fairly and consistently, but this is just part of a wider service aimed at income maximisation.

Appendix 1

SUPPORTING PEOPLE SERVICES

# Salford City Council

<i>General Counselling and Support activities</i>	Hours	% of time	£
Assistance with the security of the dwelling required due to the nature of the tenant group, e.g. reminders to close and lock doors and windows			
Helping the user to maintain the safety of the dwelling, e.g. supervision and advice on using gas and electrical appliances, e.g. fires and cookers			
Controlling access to individual tenants' room/s			
Minor repairs to equipment such as changing fuses, tightening screws			
Arranging servicing to individual tenants' appliances			
Assisting with liaison with other agencies and arranging for professionals to call			
Teaching life skills such as cooking and supervising meal preparation			
Training in maintaining the interior of the dwelling in an appropriate condition			
Arranging adaptations to cope with disability			
Advice on use of equipment provided for tenants' own use such as washing machines, TV, video			
Assistance/advice with personal budgeting & debt counseling			
Dealing with neighbour disputes and behaviour management			
Completing benefit forms and assisting in dealing with benefit claims			
Move on advice and resettlement activities necessary to enable the service user to move to accommodation where less support is required			
Assistance with planning shopping and running errands etc.			
Chatting, social intercourse, arranging social events			
Good neighbour tasks			
Other please specify:			

	Hours	%	£
General Counselling and Support Charges			
Total weekly			
Less other funding (see note 8)			
Charge to the tenant per week			

APPENDIX 2  
DEPENDENCY CRITERIA

EXTRA CARE SHELTERED HOUSING

Activity	Low	Medium	High
Bathing	<p>People who do not have any significant health or social care needs, but who are vulnerable to social isolation or have experienced emotional and psychological distress. They benefit from the availability of regular meals, monitoring and social contact, which provides security and reassurance. They may need or request some assistance or supervision of specific practical or domestic tasks such as shopping, collecting pension, cleaning and laundry. They may need some minimal supervision of their personal care, such as supervised bathing or attending day care once or twice a week. Shared housing alleviates the risk of deteriorating health and social welfare.</p>	May require supervision, monitoring and/or prompting	May need minimal assistance to get in and out of the bath and some help with hair care. Does not need constant assistance of one person but may need frequent supervision during the process
Washing and Dressing		Independent, but may require occasional prompting and supervision to dress correctly	Can wash hands and face but may require minimal assistance with other areas of body. Will require minimal assistance or frequent prompts to dress correctly
Mobility		May use equipment to be mobile and require some monitoring of safety	May need reminding to use appropriate equipment and encouragement to mobilise. May need assistance with manoeuvring
Toileting		May need encouragement/prompting to establish a routine	May need prompting to go to the toilet and minimal assistance
Continence		May have issues but should be able to manage with minimal assistance	
Night time attention		May need out of hours response during periods of illness or an emergency	May require occasional assistance
Eating and drinking		Independent, but may need some supervision and encouragement at mealtimes	Essentially independent but may require assistance in cutting up food
Communication		Able to communicate needs	No real problem, able to communicate needs
Cooking		May need some supervision of cooking and using appliances	May need assistance to plan, prepare and cook a main meal
Memory and orientation		Occasionally forgetful; may require prompting	May have mild to moderate cognitive impairment. May lose people, places, times and require prompting
Mood and agitation		No concerns	Relatively stable
Maintaining safe environment		Able to understand risk and own limitations	May have difficulties understanding risks but willing to comply with instructions to minimise risk
Nursing input		May need occasional visits from district nurses to assess, monitor and treat on a short or long-term basis	
Practical/ domestic tasks		May need regular assistance or supervision of shopping, cleaning, pension collection and laundry	Needs assistance or supervision with shopping, cleaning, pension collection and laundry

Other Housing LIN publications available in this format:

Case Study no.1: Extra Care Strategic Developments in North Yorkshire (01.09.03)

Case Study no.2: Extra Care Strategic Developments in East Sussex (01.09.03)

Case Study no.3: 'Least-use' Assistive Technology in Dementia Extra Care (02.02.04)

Case Study no.4: Tenancy Issues - Surviving Partners in Extra Care Housing (01.06.04)

Case Study no.5: Village People: A Mixed Tenure Retirement Community (15.10.04)

Case Study no.6: How to get an Extra Care Programme in Practice (15.10.04)

Case Study no.7: Sonali Gardens - An Extra Care Scheme for Bangladeshi and Asian Elders  
(11.01.05)

Case Study no.8: The Kent Health & Affordable Warmth Strategy (26.04.05)

Case Study no.9: Supporting People with Dementia in Sheltered Housing (26.04.05)

Case Study no.10: Direct Payments for Personal Assistance in Hampshire (26.04.05)

Case Study no.11: Housing for Older People from the Chinese Community in Middlesbrough  
(26.04.05)

Case Study no.12: Shared ownership for People with Disabilities (26.04.05)

Case Study no.13: Home Care Service for People with Dementia in Poole (26.04.05)

Case Study no.14: Intermediate Care Services within Extra Care Sheltered Housing in Maidenhead (26.04.05)

Case Study no.15: Sheltered Housing Contributes to Regeneration in Gainsborough (03.05.05)

The Housing LIN welcomes contributions on a range of issues pertinent to Extra Care housing. If there is a subject that you feel should be addressed, please contact us.

Published by:  
Housing Learning & Improvement Network  
Health and Social Care Change Agent Team  
Department of Health, Room LG33  
Wellington House  
135-155 Waterloo Road  
London SE1 8UG

[www.changeagentteam.org.uk/housing](http://www.changeagentteam.org.uk/housing)

Administration:  
Housing LIN, c/o EAC  
3rd Floor  
London SE1 7TP  
020 7820 1682  
[housinglin@eac.org.uk](mailto:housinglin@eac.org.uk)