

Good Practice Guide

March 2018



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1 Introduction

Care and Repair makes a substantial contribution to enabling older and disabled people in Scotland to live independently and well in their own homes for as long as is possible. In achieving this, Care and Repair makes a substantial contribution to the Scottish Government's National Health & Wellbeing Outcomes and is an important delivery partner of the Strategic Commissioning Plans (of Health & Social Care Partnerships) and the Housing Contribution Statements (of local authorities).

The Scottish Government has a longstanding policy of 'shifting the balance of care', that is supporting people to remain at home independently for as long as possible, rather than in care homes or hospitals. Emergency admissions to hospital by older people cost £1.4 billion in Scotland each year. The benefits of providing the right housing and support at the right time will be considerable, reducing both the costs and trauma of unplanned hospital admissions. In the context of a growing population of older people in Scotland, Care and Repair offers a cost-effective solution to the rising costs of care and support. As the population grows older, with more people requiring property adaptations and improvements to help them retain their independence at home; people need the help of Care and Repair in Scotland more than ever before.

This Good Practice Guide was produced by Care and Repair Scotland, the national coordinating body for Care and Repair services. It focuses on the role of Care and Repair in providing personal, financial and technical support to older and disabled people facing the difficult task of repairing, improving or adapting a home which is no longer suitable for their needs. The aim of this Good Practice Guide is to assemble and present the best policy, planning and practice material available, so that Care and Repair services in Scotland continuously improve and build capacity to achieve the vision of Care and Repair, which is...

...of a Scotland where all older and disabled people can access Care and Repair services to enable them to continue living in their own home for as long as it is safe and practical for them to do so.

This Good Practice Guide updates previous guidance published in 2011. It describes the strategic and operational context of Care and Repair services in Scotland in 2017, considers contemporary issues facing the Care and Repair sector, and promotes best practice in respect to the activities of Care and Repair services across the country.

The Guide has been developed in collaboration with the 33 Care and Repair services operating across Scotland and builds on recently developed research and Guidance from both Care and Repair Scotland and Care and Repair England.

1.1 How to use this Guide

The Guide builds on existing good practice material and is not intended to be prescriptive or to have a regulatory context. Care and Repair services should take from it what they need to maximise impact, efficiency and capacity and are encouraged to use the reference and best practice material to review, improve or further develop service delivery and business models. Not all sections of this guide will be fully relevant to every Care and Repair services in Scotland - the advice and good practice examples should be set in the context of local and operational circumstances.

The good practice guide is available to view on the website of Care and Repair Scotland <http://www.careandrepairsotland.co.uk/>.

It will be updated regularly to reflect changes in policy and in response to developments within the Care and Repair movement.

1.2 Content and format of this Good Practice Guide

The Care and Repair Good Practice Guide comprises ten chapters, each addressing a specific area of Care and Repair policy and practice as follows:

1. Introduction
2. Public Policy Agenda for Older People
3. The Care and Repair Sector in Scotland
4. 'How Scotland Works' in relation to Care and Repair Services
5. The Governance and Management of Care and Repair services
6. Care and Repair Services
7. Information and Advice
8. Performance & Quality Assurance: Why it's More Important than Ever Before
9. Adaptations and Occupational Services
10. Care and Repair: The Future
11. Equality and Diversity Issues

2 Public Policy Agenda for Older People

Care and Repair services play an important role in supporting older and disabled people to live independently in their own homes and communities. In order to understand the role that Care and Repair plays and to consider how the role might develop as Scotland manages the needs of an increasing population of older people, it is important to have a clear understanding of the Scottish policy agenda for older people.

Chapter 2 considers the evolving public policy agenda for older people in Scotland, exploring where Care and Repair can and should make a contribution to improving the health and housing outcomes of older people.

It explores the independence at home agenda, how key aspects of this agenda fit with Care and Repair's purpose and skillset, and considers how the integration of health and social care in Scotland creates a changing landscape for the planning, funding and commissioning of services like Care and Repair.

2.1 Scotland's demographics: why Care and Repair is more important than ever?

The Care and Repair Scotland Policy Statement (2017) recognises that whilst Care and Repair services make a significant contribution to improving the health and housing outcomes of older people at a national, local and personal level; many more households could benefit from Care and Repair.

*"We know that our services are highly valued but we also know that there are many more people that could be helped. The population is growing older, with more people requiring adaptations to their homes to help them retain their independence. There is also an indication that levels of disrepair can increase as people's income reduces in later years. In short, we believe that more people need Care and Repair than ever before"*¹

There is widespread agreement among policy makers, advisors and providers that Scotland's population is ageing and that there will be substantial and increasing challenges in meeting the housing, health and care needs of older people. By 2050,² it is projected that the proportion of Scotland's population over age 75 will rise to 16%, with 913,000 people in this age group. Equally, the 60-74 age group will peak in 2030 at 19% of the population (1,065,000 people). Conversely, following a decline, the population of 60-74s is projected to marginally increase between 2045 and 2050, but not returning to 2030 levels.

In 2020 there will be an additional 124,000 people over the age 60 in Scotland than there was in 2015. Essentially the future demographic environment is one where more than 1 in 3 of Scotland's population will be age 60 or over.

This represents a substantial ageing of the overall Scottish population. It can be expected that many of these older people will be able to live healthy, fulfilled and independent lives. However, it can also be expected that the numbers of older people dealing with long term ill health, disability and age related conditions will also increase substantially. Care and Repair services aimed at supporting independence are likely to become an increasingly important aspect of the public policy response to an ageing population. The challenge for Care and Repair is to influence policy makers to recognise

¹ Care and Repair Scotland National Policy Statement 2017, Pg 1

² Age, Home and Community – 5 Year Review 22/02/17 Pg14

that Care and Repair services are a cost effective solution where the potential for added value through the skills, delivery mechanisms and ethos of sector is substantial.

Policy responses to meeting the needs of Scotland’s older people are outlined below, with key areas where Care and Repair services provide a recognised or natural solution highlighted for consideration.

2.2 Reshaping Care for Older People: programme for change

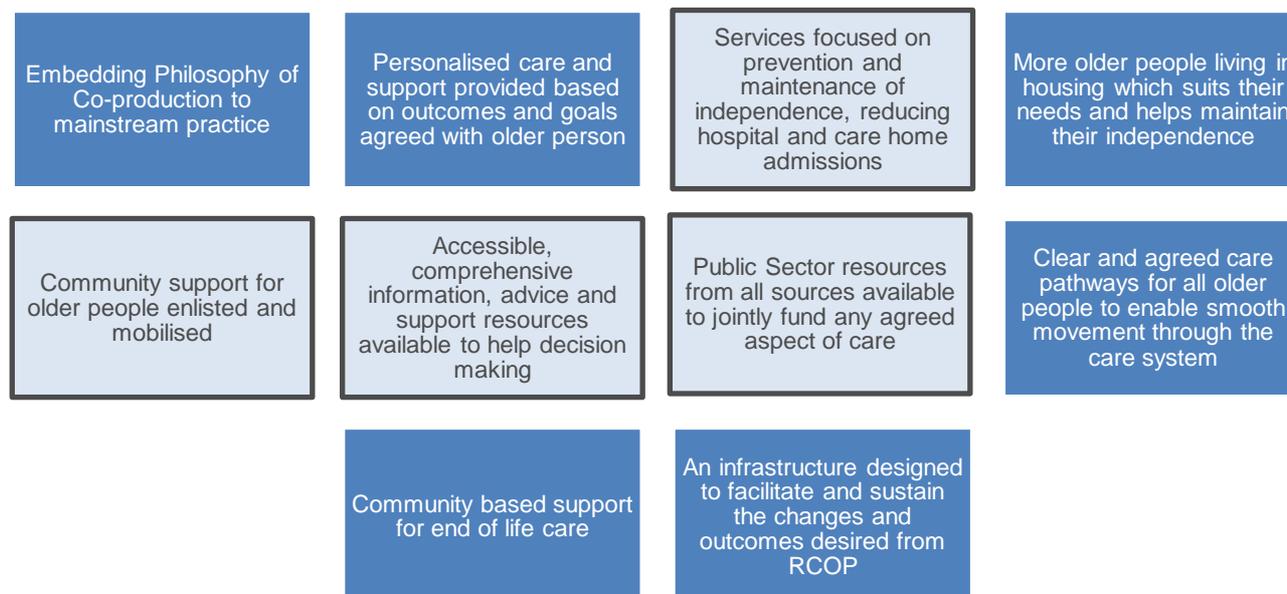
In March 2009, the Scottish Government agreed to develop a strategy for reshaping the care for older people in the light of:

- a shared aspiration to improve the quality and outcomes of current models of care;
- the implications of the projected demographic change which will increase service requirements; and
- financial pressures, which will reduce available resources.

The Reshaping Care for Older People (RCOP) programme was intended to provide a long term and strategic approach to delivering change in the future care of older people in Scotland. The RCOP programme set a clear vision as follows:

“Older people in Scotland are valued as an asset, their voices are heard and older people are supported to enjoy full and positive lives in their own home or in a homely setting.”³

The specific outcomes the Scottish Government want to achieve by 2021 are set out in the diagram below. Care and Repair services make a contribution to many of these intended outcomes, particularly those highlighted in light blue.



³ Reshaping Care for Older People: A Programme for Change 2011-2021 Pg 5

Care and Repair service clearly have the potential to make a significant contribution to the aims of Reshaping Care for Older People given that they are community based, focus on prevention, offer person-centred housing information and advice options and maximise resources through partner collaboration. This is an important narrative that Care and Repair services should carefully promote in order to influence service planners, funders and commissioners of services to older people.

<p>RCOP agenda sets a range of strategic outcomes that are a natural fit to Care and Repair</p>		<p>Community based services Focus on prevention Person-centred housing information & advice options Maximise resources through partner collaboration...</p>
<p>This is an important narrative that Care and Repair services should carefully promote in order to influence the service planners, funders and commissioners of services to older people.</p>		

2.3 Age, Home & Community: a framework for Care and Repair’s contribution

In 2011, the Scottish Government published the strategy report, “Age, Home and Community: A Strategy for Housing Scotland’s Older People: 2012-2021”. Whilst the bulk of RCOP focuses on the health and social care agendas, it is recognised that housing is a critical dimension to getting it right. As a result, the development of a housing strategy for older people was a main early action of the Wider Planning for an Ageing Population Working Group. The strategy identified five clear outcomes, one of which specifically recognises the role of Care and Repair in meeting the housing and support needs of older people and suggests that services are extended:

<p>Clear strategic leadership</p> <p>To consult, drive innovation & alignment across housing, health & social care; and to show how housing investment shifts the balance of care</p>	<p>Information & advice</p> <p>To review & publicise existing services, drive towards a housing options approach for older people & secure information accreditation</p>	<p>Better use of existing housing</p> <p>To deliver & fund adaptations; help owners maintain homes; encourage downsizing; prepare a practical guide to redevelop sheltered housing & make it easier for older people to access equity in their homes</p>	<p>Preventative support</p> <p>To explore extending care and repair & developing social enterprise models; showcase housing ability to build community capacity; continue to develop and mainstream use of telecare</p>	<p>New housing provision</p> <p>To review whether current building & design standards meet the needs of older people; and encourage development of new models of housing with care and support in all tenures</p>
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Underlying these outcomes are four important principles, which echo not only the ethos of Reshaping Care for Older People but the values of Care and Repair in Scotland:

- **Older People are an Asset:** Older people’s experiences are vital to ensuring that the services they use are fit for purpose. They are also big providers of care;
- **Choice:** There is no single model of housing and support services that meet the needs of all. There is a need for a range of different types of services that are flexible and enable older people to choose;
- **Planning Ahead:** Planning for older age should be seen as a positive part of life, enabling people to prepare at an early stage for their future needs; and
- **Preventative Support:** Housing and housing-related services provide a relatively inexpensive and cost effective way of enabling older people to live independently at home when compared with care homes and hospital admissions.

The strategy is underpinned by a total of 34 commitments. At least eight of these key commitments have a direct impact on Care and Repair as outlined below:

<p>7. Examine services providing information & advice on housing & support for older people, to ensure the best use is made of information about the opportunities available to older people</p>	<p>11. Encourage organisations providing information & advice to older people to gain accreditation under the Scottish National Standards for Information and Advice Providers</p>	<p>12. Through the Adaptations Working Group, consider if there is a need for fundamental change to the funding & delivery of housing adaptations, so that they provide optimum outcomes</p>	<p>16. Support the extension of information and advice to help home owners find reliable tradespeople to undertake repairs and maintenance</p>
<p>19. Re-shape & extend, existing services, so that older people, have the opportunity to access information and advice about their housing, support and care options</p>	<p>25. Publicise and extend understanding of the role, contribution and benefits of housing support services, particularly in relation to their value for money</p>	<p>28. Look at options for extending the role of Care and Repair and businesses operating as social enterprises, to include handyperson type services</p>	<p>30. Continue to develop telecare and tele-healthcare through the Change Fund for Older People's Services and local partnerships</p>

Age, Home and Community is a strategy for housing for Scotland’s older people implemented across the period 2012-2021. As suggested, the role for Care and Repair in delivering several key aspects of this strategy is obvious.

Clear opportunities therefore arise from the natural fit between strategic commitments in the national housing strategy for older people and the role and delivery model of Care and Repair in Scotland including:

- Accredited housing information and advice provision;
- Effective and efficient mechanisms to deliver property adaptations;
- Supporting older homeowners to access reputable tradesmen;
- The impact of preventative support services such as handyperson services; and
- The continued role for telecare in creating a suitable home environment.

The Strategy is monitored by the 'Older People's Housing Strategy Monitoring and Advisory Group'. When the Strategy was published, the Scottish Government committed to a mid-point review to assess progress and address changes that have occurred since the strategy was produced in 2011. The 5 Year Review of 'Age, Home and Community' was produced in 2017. It outlines many of the successes of the strategy and concludes by noting many of the public policy changes since 2011. These include:

- The introduction of health and social care integration which has resulted in the creation of 31 new Health and Social Care Partnerships;
- The Scotland Act 2016 which devolved a range of social security powers to the Scottish Parliament;
- The Joint Housing Delivery Plan for Scotland;
- Self-Directed Support (SDS) which enables people to have more choice and control over how their care and support is delivered; and
- Welfare reform measures including changes to local housing allowance which impact on people living in supported accommodation.

With these changes in mind the 5 Year review indicates that a "refreshed strategy" will be published which takes account of this change to the public policy architecture. Care and Repair organisations will wish to give detailed attention to the outcomes of that refreshed strategy.

2.4 Health & Social Care integration

A major development since the 2011 Care and Repair Good Practice Guide, has been the introduction of health and social care integration. The Christie Commission which reported in 2011 heralded a reform and 'renewal' of public services in Scotland with an emphasis on partnership, integration, investment and improvement. This laid the ground work for 'The Public Bodies (Joint Working) (Scotland) Act 2014' which established the legal framework for integration and was implemented in April 2016. This legislation brings together NHS and local council care services in partnership with the housing sector and has resulted in Health and Social Care Partnerships being established across the country.

Just over one year on from establishment 'integration' is still at an early stage with Integrated Joint Boards (IJBs) focusing on organisational set up and change management rather than transformational change. As part of their strategic planning, across 2016/17 the Health and Social Care Partnerships (HSCPs) have been preparing Strategic Commissioning Plans.

The purpose of Strategic Commissioning Plans is to assess and forecast needs, to link investment to agreed desired outcomes, to consider options, to plan the nature, range and quality of future services and to working in partnership to put these in place.

Given the strategic significance of Integrated Joint Boards and their commissioning power, it is very important that Care and Repair ensure the service provided and the major contribution and value this offers in enabling independence at home is well understood by strategic planners and commissioners.

2.5 National Health & Wellbeing framework

The ⁴National Health & Wellbeing Framework (2015) has the following overarching statement:

Health and social care services should focus on the needs of the individual to promote their health and wellbeing, and in particular, to enable people to live healthier lives in their community. Key to this is that people's experience of health and social care services and their impact is positive; that they are able to shape the care and support that they receive; and that people using services, whether health or social care, can expect a quality service regardless of where they live.

The National Health & Wellbeing Framework (2015) sets out a range of outcomes which apply across all Integrated Joint Boards (IJBs) to ensure that all Health Boards, Local Authorities and IJBs are clear about their shared priorities. These outcomes will also form the basis for ministerial performance management of health and social care and provide a strategic framework for the planning and delivery of health and social care services. There are nine health and wellbeing outcomes which apply to integrated health and social care services as follows:

1. People are able to look after and improve their own health and wellbeing and live in good health for longer;
2. People, including those with disabilities or long term conditions, or who are frail, are able to live, as far as reasonably practicable, independently and at home or in a homely setting in their community;
3. People who use health and social care services have positive experiences of those services, and have their dignity respected;
4. Health and social care services are centred on helping to maintain or improve the quality of life of people who use those services;
5. Health and social care services contribute to reducing health inequalities;
6. People who provide unpaid care are supported to look after their own health and wellbeing, including to reduce any negative impact of their caring role on their own health and well-being;
7. People who use health and social care services are safe from harm;
8. People who work in health and social care services feel engaged with the work they do and are supported to continuously improve the information, support, care and treatment they provide;
9. Resources are used effectively and efficiently in the provision of health and social care services.

It is important that Care and Repair Services are developed in a way that positively engages with these National Health and Wellbeing outcomes, particularly since such a significant part of the service offer make a direct and significant contribution to the achievement of these outcomes. In particular, Care and Repair should seek recognition within Strategic Commissioning Plans of the role and contribution Care and Repair services offer in relation the second National Health & Wellbeing outcome: "*people, including those with disabilities or long term conditions, or who are frail, are able to live, as far as reasonably practicable, independently and at home or in a homely setting in their community*".

⁴ National Health and Wellbeing Outcomes (2015)

The Care and Repair Policy Statement published in 2017 echoes this view, suggesting that “*health and social care integration provides Care and Repair with many exciting opportunities for joint working.... There are significant opportunities for Care and Repair services to demonstrate how they can take pressure off other services by facilitating, for example, hospital discharge, maintaining technology and enabled care equipment, managing equipment stores and delivering dementia friendly solutions in the home.*”

We are absolutely clear that every local Care and Repair services in Scotland is in an ideal position to deliver on the first four National Health and Wellbeing Outcomes and particularly on Outcome 2. We believe that Care and Repair is equal to the task of delivering high quality, jointly commissioned services, that place the customer first and continue our long standing and successful ethos of home based and personalised solutions”. (Care and Repair Scotland Policy Statement, 2017).

2.6 Dementia strategy 2017-2020

The Scottish Government has now published three National Dementia Strategies from 2010-2013; 2013-2016 and 2017-2020 which have been met positively across housing, health and social care sectors.

The third Dementia Strategy for 2017-2020⁵ has only recently been published and Care and Repair services should think carefully and creatively about how the services they offer can make an important contribution to meeting the housing needs of people with dementia. The new Dementia Strategy outlines 21 strategic commitments and those outlined below should have particular resonance with Care and Repair services seeking to develop an offer which involves adapting the home environment of a person with dementia to remain at home or to return home quickly following hospital admission:

Commitment 3: We will support Integration Authorities to improve services and support for people with dementia by implementing key actions on delayed discharge, reducing unscheduled bed days, improving palliative and end of life care and strengthening community care.

Commitment 7: We will continue to implement national action plans to improve services for people with dementia in acute and specialist NHS care, strengthening links with activity on delayed discharge, avoidable admissions and inappropriately long stays in hospital.

Commitment 11: We will implement the Technical Charter for People in Scotland with Dementia, ensuring that everyone with a diagnosis of dementia and those who care for them are aware of, and have access to, a range of proven technologies to enable people living with dementia to live safely and independently. We will continue to explore innovative ways in which technology can be used and adapted for people living with dementia.

Commitment 12: We will work with national and local stakeholders to implement actions in the refreshed Age, Home and Community: A Strategy for Housing Scotland’s Older People: 2012 – 21 to support people to live safely and independently at home for as long as possible.

Commitment 14: As part of supporting local activity on dementia-friendly communities, we will work with partners to explore the potential to promote and support increased participation in dementia befriending.

The role of Care and Repair in reducing delayed discharge, promoting independence at home and offering preventative support services which enable people with dementia to avoid social isolation is therefore potentially very strong. On this basis, Care and Repair services should give specific consideration to this strategy to determine how Care and Repair services might be shaped to proactively address the needs of people with dementia.

⁵ Scotland’s National Dementia Strategy 2017-2020

2.7 Key Messages: public policy agenda for older people

Care and Repair sector awareness of the wider public policy agenda for older people in Scotland is crucial, firstly because the agenda has moved on considerably since the 2011 Good Practice Guide and secondly because there are real opportunities for Care and Repair services that are prepared to engage with the evolving agenda and shape their service offerings toward the emerging priorities.

The key messages of this chapter are as follows:

1. **Demographic awareness:** Within the next 20 years, the demographic environment will be one where more than 1 in 3 of Scotland's population will be aged 60 or over. As the public policy agenda develops in Scotland to meet the needs of this population, Care and Repair services must proactively ensure that the contribution they make in enabling older people to live independently and well in their own homes for as long as possible, is promoted and recognised by strategic planners, funders and commissioners;
2. **Reshaping Care:** Care and Repair services can make a meaningful contribution to the delivery of the 'Reshaping Care for Older People' agenda. Specifically Care and Repair is/could be instrumental in meeting a number of Scottish Government outcome measures which relate to the delivery of services to older people that are: community based, focused on prevention, offer person-centred housing information and advice; and maximise resources through partner collaboration;
3. **Age, Home and Community:** Care and Repair has a clear role to play in delivering at least 8 of the 34 commitments made in this strategy given the natural fit between these commitments and the Care and Repair delivery model including:
 - Accredited housing information and advice provision;
 - Effective and efficient mechanisms to deliver property adaptations;
 - Supporting older homeowners to access reputable tradesmen;
 - The impact of preventative support services such as handyperson services; and
 - The continued role for telecare in creating a suitable home environment.
4. **Health & Social Care Integration:** This is a major structural change in the planning and delivery of housing, support and care services since the 2011 Guide. Care and Repair services will need to establish how to influence this new commissioning framework and in particular, how to achieve recognition within Strategic Commissioning Plans of the role and contribution services offer in relation the second National Health & Wellbeing outcome: "people, including those with disabilities or long term conditions, or who are frail, are able to live, as far as reasonably practicable, independently and at home or in a homely setting in their community".
5. **Dementia:** The third dementia strategy has been published and 5 of the 21 commitments might provide fertile ground for Care and Repair services who wish to develop their service offering to meet the needs of people with dementia.

3 The Care and Repair Sector in Scotland

Care and Repair services in Scotland have evolved significantly since their origin over 30 years ago, responding to both major changes in Scottish public policy and to the needs of a growing population of older people.

Chapter 3 provides an overview of Care and Repair in Scotland outlining the size and shape of the sector in 2017 including:

- **funding and resource commitments;**
- **the number of customer interactions and scale interventions;**
- **the extent and nature of Care and Repair services; and**
- **the emerging policy and practice which may influence the delivery of Care and Repair services in the future.**

3.1 Background to Care and Repair services in Scotland

Despite major changes to the strategic and operational context for Care and Repair services, the strategic aims of Care and Repair have remained largely the same since the 1980’s: *“to enable older and disabled people to remain in their own homes for as long as it is practical and safe to do so, rather than going into care homes or hospital, and to enjoy the benefits of good quality housing in the community”* (Care and Repair Scotland, Policy Statement, 2017).

In 2017, 33 Care and Repair services across Scotland worked to deliver these aims by providing advice and assistance with building works in the home, ranging from simple maintenance tasks to complex major repairs, improvements and property adaptations. Whilst the central purpose of Care and Repair is to offer property based services to older and disabled home owners; the range of services provided, and in some cases the client groups served, have evolved in response to local circumstances and local authority funding arrangements.

Given this responsiveness to the local delivery context, Care and Repair is a very diverse sector in terms of its delivery model, customer profile and service offer. Despite this, the Care and Repair Scotland National Policy Statement (2017) recognises an important ethos and set of values that are shared and upheld across the sector. To this end, the National Policy Statement recognises the defining characteristics of the Care and Repair delivery model as a *“home based and personalised service which assists customers to make informed decisions”*. Underpinning this core service offer are six ‘guiding principles’ that set out how Care and Repair services across the sector work:

<p>Customer empowerment</p> <p>All decisions will be taken by the customer, including the choice of contractors and the final specification of works</p>	<p>Not for profit</p> <p>Objective, professional advice is provided, uninfluenced by any commercial considerations</p>	<p>Flexibility & choice</p> <p>Tailoring the services to meet the specific needs of each customer while providing an impartial and independent overview of the casework</p>	<p>Privacy & trust</p> <p>Building trust by respecting the privacy of customers and ensuring that personal information is treated in confidence and by treating customers with respect</p>	<p>Advocacy</p> <p>Acting for the best interests of the customer when liaising with individuals and organisations that can assist in moving the casework forward</p>	<p>Equality & diversity</p> <p>Seeking to ensure that information on services available to older and disabled persons and access to them is available regardless of gender, ethnicity</p>
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Undeniably, Care and Repair services in Scotland are bound by a common purpose (mission), shared strategic aims and a set of values that define the nature of what is delivered and how it's delivered. Whilst the sector shares a common mission and a culture which protects key principles like 'not for profit', 'customer empowerment', 'personalisation' and 'choice'; Care and Repair services have developed with flexibility to meet local needs and in response to funding opportunities. On this basis, the sector has huge potential to offer policy and practice ideas which could enable innovation, growth or service improvement.

3.2 The extent and nature of Care and Repair activity in Scotland

It is clear that given the strategic fit between the Care and Repair delivery model and the public policy agenda for older people that Care and Repair in Scotland has strong potential to make a substantial impact on improving the health and housing outcomes of older people in Scotland. Whilst the Care and Repair Scotland National Policy Statement 2017 suggests that "*there are many more people who could be helped*", current evidence suggests that Care and Repair activity is already extensive in its scope to enable older and disabled people to continue living in their own homes.

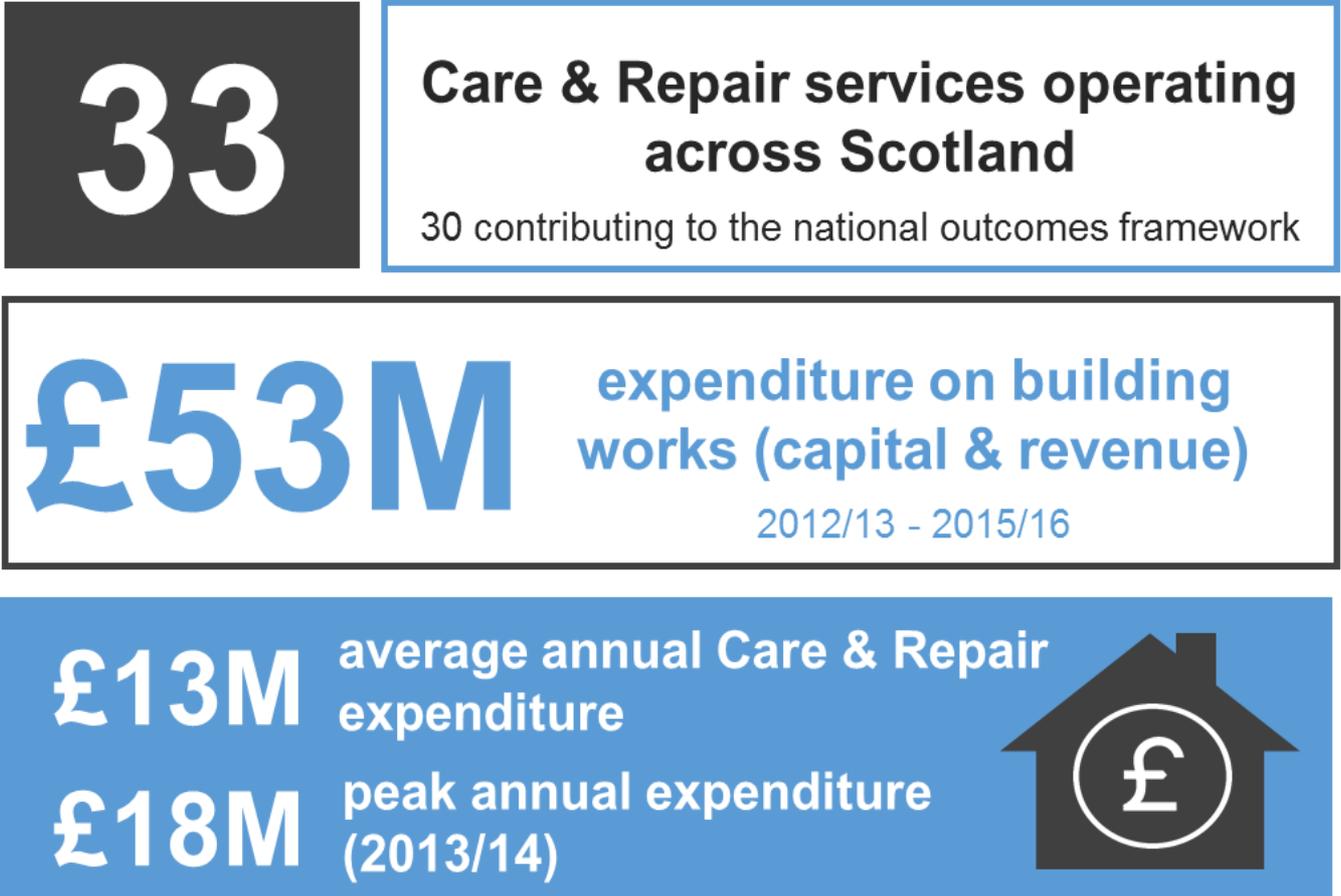
In 2017 there are 33 Care and Repair services providing Care and Repair services across 30 local authority areas in Scotland. Whilst there are gaps in geographical coverage (there is currently no Care and Repair service in Midlothian or Clackmannanshire) service provision can be considered to be national. Nonetheless it remains a challenge to ensure that there is a consistency of service provision across the country.

An important achievement in recent years is the development of an 'Outcomes Framework' for Care and Repair in Scotland, which supports data capture on the scale and impact of the sector. The framework has assembled evidence on Care and Repair activity across a suite of outcome measures over the period from 2012/13 to 2015/2016; gathering information from 30 Care and Repair service across Scotland.

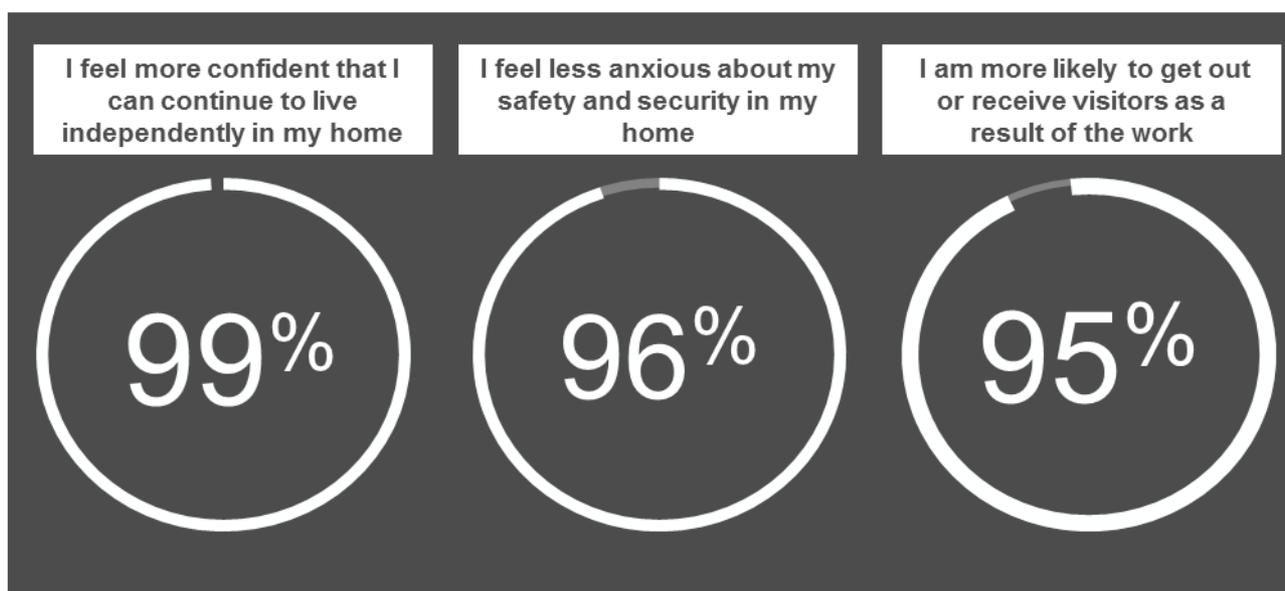
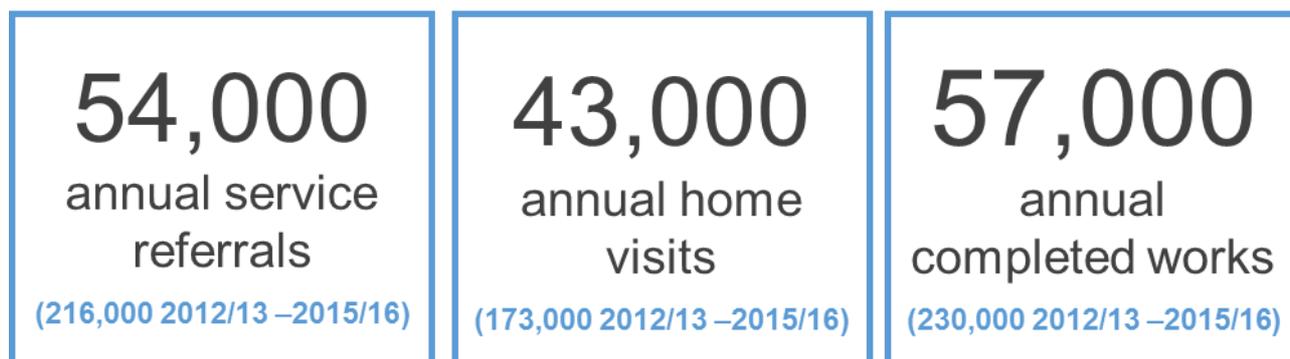
Across this four year period, Care and Repair services completed building works to the value of £53M. This figure is the total public and private expenditure for completed projects. The value of completed work peaked in 2013/14 at £18M.

Apportioned costs of £13.8M represent the revenue expenditure associated with this programme (over the same period from 2012/13 – 2015/16), including all costs associated with delivering the service including staff and overheads.

Headlines on the extent and nature of Care and Repair activity in Scotland include:



As well as a significant value of repair works, the outcomes framework reveals that Care and Repair services assist over 50,000 older and disabled clients every year, delivering a wide range of property repair, adaptations and improvement works. The following infographic illustrates the numbers of referrals, home visits and completed jobs spanning the four year period from 2012/13 – 2015/16. Over this period, the Care and Repair sector received over 200,000 referrals, made 173,000 home visits and completed over 230,000 jobs.



As well as evidencing the scale of interventions delivered to support older and disabled people to remain at home, the outcomes framework also highlights the contribution of Care and Repair to the independence at home agenda. Well over 90% of clients express positive outcomes across a range of indicators following interaction with Care and Repair services. There is positive evidence that access to Care and Repair services that focus on prevention, enable older and disabled people to maintain independence and feel more confident and secure about living in their own home.

The outcomes framework demonstrates the substantial impact that Care and Repair makes to improving the housing and health outcomes of older and disabled people in Scotland. It also highlights the importance of all Care and Repair services committing to an outcome reporting framework as powerful evidence in articulating the value of the sector to commissioners.

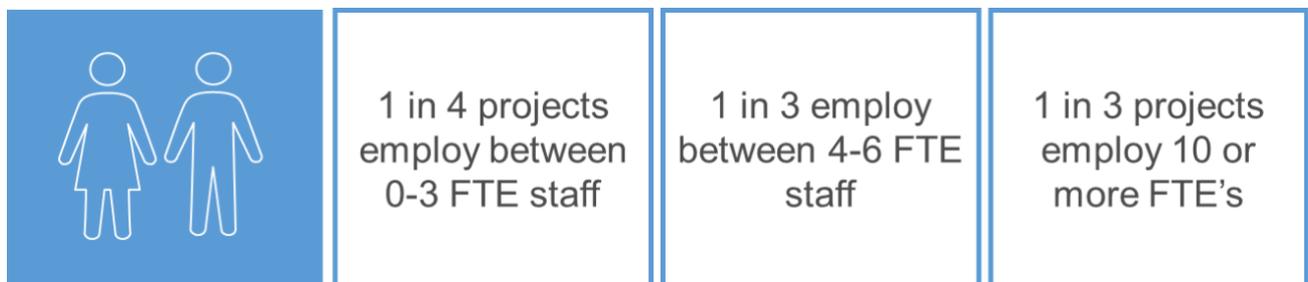
3.3 Care and Repair sector snapshot 2017

In order to provide accurate intelligence on the size and shape of the Care and Repair sector in Scotland, a survey of all 33 Care and Repair services was carried out in July and August 2017. In total, 27 Care and Repair services completed the survey (an 82% response rate) providing a credible snapshot of the sector in terms of governance arrangements, organisational size and scale, and activity profile.

Survey outcomes suggest that in terms of governance, the vast majority (70%) of Care and Repair services continue to be managed and delivered by Registered Social Landlords (59%) or local authorities (11%).

Despite the advice in the 2011 Care and Repair Good Practice Guide, there are still only a minority of Care and Repair services which are independently managed. The significant majority of projects are managed and delivered with by local authorities or Registered Social landlord. Whilst roughly a quarter (26%) are Companies Limited by Guarantee, there has been very limited take up of social enterprise vehicles. Only 2 services indicated that they are “Scottish Charitable Incorporated Organisations” (SCIOs), with 1 service a Registered Society under the Cooperative and Community Benefit Society Act 2014. Despite an agenda which has encouraged services to consider whether governance arrangements provide sufficient organisational independence to enable growth and development, Care and Repair services remain largely integrated into the wider organisation of social landlords in Scotland.

Despite relative consistency in the governance model of the sector, survey outcomes reveal a huge diversity in Care and Repair services in terms of organisational scale and scope of activity. The majority of Care and Repair services are small employers, employing on average 5.5 FTE staff per project.



By volume, survey respondents managed over 68,000 referrals across the last year, which is an increase in the scale of referral activity captured by the outcomes framework. The greatest volume of activity relates to small repairs services which received 23,140 annual, although 60% of these were received by just 4 Care and Repair Services. Equally, when completions are examined 20,098, 56% were achieved by just 4 projects. The Handy person service was the next most numerous at 9,705 referrals and 8,931 completions, 76% of the completions were achieved by four projects.

There is significant diversity of size and scale among the Care and Repair services in Scotland



In terms of the volume of work and the number of customers served, survey outcomes suggest that 41% of Care and Repair services in Scotland assist less than 100 customers per month with 23% assisting between 400 and 650 per month.

When asked to describe the capacity of their service, 59% of projects took the view that they were about right and were able to meet the demands being placed upon the service or were under capacity. It tends to be the larger organisations with larger staff teams that had a sense of being over capacity.

The Care and Repair sector in Scotland provides a very diverse range of services including:

Type 1, 2, 3 Information and Advice	Handyperson services	Garden Maintenance
Hospital Discharge services	Telecare	Welfare Benefits
Major adaptations	Trades Referral - Trusted trader	OT Services
Minor Adaptations	Affordable warmth, energy efficiency	Digital Inclusion
Major Repairs	Home Safety	Equity Release
Small Repairs	Home Security	Dementia Services

Survey outcomes indicate that there is no single service offer that is provided by every Care and Repair service. This shows the rich diversity and variety of services that are delivered under the banner of “Care and Repair”.

The most predominant services delivered by 70% or more of Care and Repair services are:

- Type 1 information & Advice (89%);
- Major adaptations (85%);
- Small repairs (81%); and
- Minor Adaptations (70%).

It is fair to say that these four services constitute the current core of ‘Care and Repair’ services. Having said this, a potential growth area for ‘Care and Repair’ services relate to activities that promote and underpin the health and social care agenda. These are beginning to feature on the landscape at the present time but clearly present a range of future opportunities, and include:

- Hospital Discharge services (41%);
- Telecare (26%);
- Dedicated OT (11%); and
- Dementia Services (11%).

The Care and Repair service offer (both current and future) will be discussed in greater detail in Chapter 6 of this Guide: Care and Repair services.

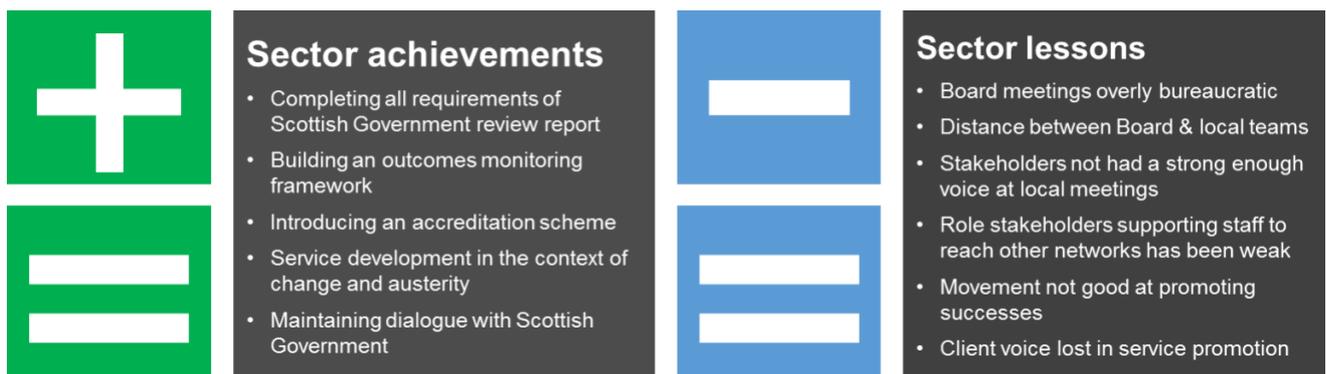
3.4 Care and Repair Scotland

Care and Repair Scotland is the national coordinating body for Care and Repair services in Scotland. It is an independent charitable company which is grant funded from the Scottish Government. The Board includes representatives of SFHA, ALACHO, the NHS, voluntary sector bodies and Care and Repair local agencies.

The role of Care and Repair Scotland to provide a national platform to lead, promote and support local Care and Repair services to work collaboratively to achieve the strategic aim of helping older and disabled people to live independently in their own homes. The priorities for Care and Repair Scotland in carrying out that role include:



The Care and Repair Scotland Business Plan (2016-19) recognises a number of sector achievements and lessons to be learned, which inform the Care and Repair business development agenda including:



With these achievements and lessons in mind the business plan for 2016-2019 has identified four objectives for the next three years:

Effective engagement

Engaging directly with decision makers in the Scottish Government & Parliament, local authorities, the NHS & other bodies, service users, their families & carers to promote the importance & potential of Care and Repair

Local delivery

To support local delivery of Care and Repair across the whole of Scotland so that all eligible persons can access a service

Innovation & improvement

To promote innovation in practice at the local level

Governance

To maintain Care and Repair Scotland as a fit for purpose organisation, delivering good governance, meeting its legal and financial responsibilities and providing effective leadership

The Business Plan outlines an action plan for each of these objectives and measures the Care and Repair Contribution to the National Health & Wellbeing Outcomes. It will be important for Care and Repair Scotland to make solid progress with business plan implementation to create the operating environment which support services to might flourish.

3.5 Key Messages: the Care and Repair sector in Scotland

Understanding the extent and nature of the Care and Repair sector in Scotland is important to developing a good practice and development agenda which is flexible enough to cope with the huge diversity the sector offers. The key messages on the Care and Repair Sector in Scotland are as follows:

1. **Core values and purpose:** despite an important localism agenda that enables services to meet local needs and opportunities, the Care and Repair sector in Scotland is bound together by a clear common purpose, strategic aims and core values;
2. **Scale:** Over a four year period, Care and Repair Services completed over £53M of improvement works and completed almost a quarter of a million projects which enabled older and disabled people to remain independent at home. This activity makes a substantial contribution to the 'Age, Home & Community' agenda which aims to shift the balance of care;
3. **Satisfaction:** Over 90% of service users access positive outcomes as a result of their engagement with Care and Repair services on a range of indicators which measure independence and quality of life;
4. **Diversity:** Care and Repair services across Scotland differ substantially in terms of size and scale both in terms of organisational structure and the volume of customer interactions managed. The extent to which this guidance will be used and applied will vary significantly depending on that size and scale;
5. **Services:** There is an increasing diversity of services offered across Care and Repair sector in Scotland; in fact, no two Care and Repair services are the same. Current 'core' services are Type 1 information and advice, major adaptations, minor adaptations and small repairs. A number of projects are developing services which make a direct contribution to the health and social care agenda such as hospital discharge services, telecare, OT services and dementia services; and
6. **Care and Repair Scotland:** Have a key role to play in ensuring effective partner engagement; local delivery; and sector innovation and improvement.

4 'How Scotland Works' in relation to Care and Repair Services

Chapters 2 and 3 of this Guide acknowledge a clear shift in the operating environment of Care and Repair services since the origin of the sector, in terms of:

- demographic change and a broadening customer need profile;
- the public policy agenda on independence at home; and
- planning, commissioning and funding structures.

Undoubtedly whilst the sector currently makes a substantial contribution to enabling older and disabled people to live independently and well at home; it is acknowledged that Care and Repair has the potential to make a greater contribution in the future. It's been suggested that to achieve this, services should:

- accept that collaboration and partnership is an essential component of enabling independence at home and the range of partners that services engage with is broadening and evolving;
- be ready to meet a changing need profile at a customer and community level; and
- engage more with strategic commissioners in health and social care partnerships, promoting the potential contribution that Care and Repair can make to shifting the balance of care.

To achieve this, services may need to look beyond the existing funding mechanisms, partnerships and service models that have been the bedrock of the sectors development and growth.

Chapter 4 provides an overview of how of Scotland works in relation to Care and Repair services, in terms of:

- **the sector's history and core purpose;**
- **contribution to the private sector housing improvement agenda;**
- **contribution to the health and wellbeing agenda;**
- **funding challenges and opportunities.**

4.1 Historically, how were Care and Repair services planned and funded?

Care and Repair Services originated in the early 1980's, firstly as a pilot in two areas of Scotland before being established in eight local authority areas in 1987. These services evolved in response to concerns that there were a significant number of older owner occupiers living in poor housing conditions who did not have the financial resources or technical expertise required to deal with problems of housing disrepair. The first Care and Repair services were established by Age Concern Scotland and Shelter (Scotland), with further services subsequently set up and funded by Scottish Homes and local authorities.

From 1993 onwards, Scottish Homes provided a central support function to Care and Repair organisations, including the establishment of Care and Repair Forum Scotland. Following a reorganisation of Care and Repair services in 1995, Care and Repair organisations were then coordinated by Scottish Homes' regional offices, a function that then passed to Communities Scotland on its establishment in 2001.

From its inception therefore, Care and Repair focused on addressing issues of property disrepair and enjoyed the protection of being centrally coordinated by the Scottish Executive and then Government. However, a shift in the funding and strategic planning of Care and Repair services was initiated for two reasons: firstly, by the disbanding of Communities Scotland in 2008 and secondly as a result of the private sector housing agenda stimulated by the Housing (Scotland) Act 2006.

When Communities Scotland was disbanded in 2008, most of its responsibilities transferred to the Housing and Regeneration directorate of the Scottish Government, with the Scottish Housing Regulator was formed to take over the work of its Regulation and Inspection division.

Whilst the Scottish Government retains a strategic interest in Care and Repair, the planning and funding of services is now generally the remit of local authorities through the development and delivery of local housing strategies. Initially, as part of the LHS framework, the requirements of the Housing (Scotland) Act 2006, and the Scheme of Assistance Regulations 2008 had a major influence on the funding and service delivery context of Care and Repair in Scotland. The main purpose of the Housing (Scotland) Act 2006 is to address poor property condition issues in the private housing sector (both owner occupied and the private rented sector homes). Under part 2 of the 2006 Act, local authorities must make a 'Section 72' statement which sets out the local authority's strategy for providing support to owner occupiers and private tenants through the delivery of a 'Scheme of Assistance' to owners.

The Scheme of Assistance framework reflects the view that although owners are responsible for maintaining their home, help from a local authority may be available. This means that whilst local authorities place emphasis on encouraging owner responsibility, public funding to assist those who are unable to instruct repairs to their homes through their own financial arrangements can be considered. Care and Repair services are therefore well placed to make a significant contribution to the delivery of a Scheme of Assistance in the local authority area in which they operate.

The person centered ethos of Care and Repair services, is consistent with the duty held by local authorities to assist older owners and disabled persons while ensuring that clients themselves take responsibility for the maintenance of their properties. Part 2 of the Housing (Scotland) Act 2006 Act ends the previous arrangements for improvement and repair grants that were set out in the Housing (Scotland) Act 1987 and the Housing (Scotland) Act 2001. The 2006 Act places an emphasis on the provision of advice and information. To support local authorities to discharge their duties in respect of the Scheme of Assistance, the Scottish Government funding mechanism Private Sector Housing Grant was set up.

As a result, Care and Repair core funding has in recent years been allocated indirectly from the Scottish Government through Private Sector Housing Grant, allocated by local authorities to Care and Repair services to support delivery of the Scheme of Assistance. From 2007- 2010, Private Sector Housing Grant was ring fenced by local authorities and could be allocated to support housing improvement works (often administered by Care and Repair services) including major repairs, improvements, adaptations, and other preventative services such as small repairs.

Since 1st April 2010, local authorities no longer provide grants for repairs and improvements, instead moving to the provision of assistance to owner occupiers in the form of information, advice, guidance and practical assistance. This has had a major impact on the activity and service offer of Care and Repair in Scotland, with a movement away from the delivery of major repair projects towards property adaptations and small repairs.

The catalyst for this shift is the removal of the ring fence on Private Sector Housing Grant, which effectively ends the ability of local authorities to set aside a specific budget for private sector improvement work. Practical help through mandatory grant assistance is now only available in respect to alterations to meet the needs of disabled persons or the provision of standard amenities.

This shift in funding arrangements has had a significant impact on Care and Repair, not just in terms of a shift in the core remit of the sector from major repairs to property adaptations; but more crucially on the protection of revenue funding for Care and Repair in the context of local authority financial pressures.

These developments have fundamentally changed both the focus of Care and Repair services, the funding mechanism for the sector and the protection offered by central government coordination and support.

Whilst Care and Repair services continue to be almost entirely dependent on funding from local authorities, long term certainty over the allocation of resources is increasingly limited as the financial pressure associated with delivering public services continues to be felt. The Care and Repair Scotland National Policy Statement 2017, addresses this issue, encouraging action not only by the Scottish Government but by individual Care and Repair services:

“We need more commitment by Government at all levels to the delivery of the preventative agenda that will enable people to live healthier lives in their own community. Teams need longer term funding arrangements to allow them to extend the scope of their work and develop new services in line with the health and wellbeing agenda. Care and Repair Scotland will work to establish and demonstrate the benefits both to the individual and to the public purse which flow from the delivery of Care and Repair services.

However, recognising the pressures on council budgets, Care and Repair local teams should consider the scope for developing other sources of income. Care and Repair Scotland will work to support local Care and Repair agencies in the development of income generation strategies”.



Sourcing income from a broader range of funders and considering options to develop income generating services is likely to be an essential aspect of the future agenda for Care and Repair services if the sector is to grow, develop and fulfil its potential in shifting the balance of care for older and disabled people

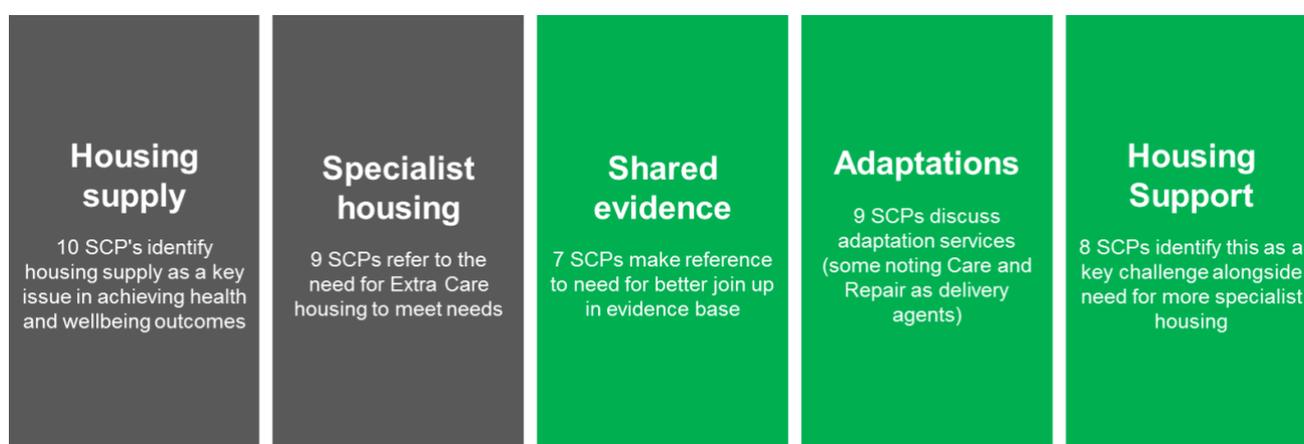
4.2 How will Care and Repair services be planned and funded in the future?

As outlined in Chapter 2, the Care and Repair sector continues to work within the broad policy framework of “Age, Home and Community: A Strategy for Scotland’s Older People: 2012 - 2021” which outlines a long-term policy of shifting the balance of care by supporting people to live independently in their own homes for as long as possible, rather than in care homes or hospitals. Undoubtedly, Care and Repair has an important role to play in shifting the balance of care from acute services to prevention. On this basis, it could be assumed that the role and viability of the sector has huge potential to be secured long-term.

It is important that Care and Repair Services are developed in a way that positively engages with National Health and Wellbeing outcomes, particularly since the core Care and Repair service offer can make a direct and significant contribution to their achievement. However, the extent to which Care and Repair features as strategic priority for Integrated Joint Boards (IJB) in Scotland remains unclear at this stage.

Each Integration Authority is required to prepare and produce a “Strategic Commissioning Plan” (SCP). This plan has a three year life cycle and provides the context for the commissioning of services as directed by the IJB. It is also consistent with other planning frameworks such as Single Outcome Agreements, Local Housing Strategies and other corporate plans. SCPs take an outcomes approach, based on a Joint Strategic Needs Analysis and include a Housing Contribution Statement. Housing has a key role to play in this agenda and it is essential that Care and Repair services have a role in local discussions and in identifying solutions. Undoubtedly, if Care and Repair services are to reach their full potential it will be important for Care and Repair to feature on the Integration Authority agenda.

Recent research by the Improvement Hub (ihub) (who provide support to health and social care organisation to redesign and continuously improve services) delivered a detailed examination of all Strategic Commissioning Plans in Scotland to assess the extent and nature of housing content (including whether Care and Repair features as a partner) as part of its ‘Place, Home & Housing’ agenda. The research identified consistent housing themes which consistently emerged within Strategic Commissioning Plans, three of which have particular resonance for Care and Repair services:



Clearly a number of these strategic themes will be of interest to Care and Repair Services and it is encouraging to see them articulated in Strategic Commissioning Plans in the first round of planning activity. The ihub review found that a minority of Strategic Commissioning Plans addressed Care and Repair issues directly, with a least a third placing focus on property adaptations. Some Strategic Commissioning Plans addressed Care and Repair in the content of the Housing Contribution Statements (HCS). In a smaller number of cases Care and Repair features at the heart of a Strategic Commissioning Plan. Good examples include:

<p>Perth & Kinross HSCP Strategic Commissioning Plan (2016-19) places a clear priority on the work of Care and Repair:</p> <p>“We will continue to work with housing partners to ensure that people are supported to live as independently as possible in housing that is suitable for their needs:</p> <ul style="list-style-type: none"> • Develop Care and Repair services to ensure access to adaptations for people in private sector accommodation • Review the use of aids and adaptations in social housing 	<p>Scottish Borders HSCP include a clear reference to Care and Repair within its Key Objective:</p> <p>“We will seek to enable people to have more choice and control”</p> <p>“Borders Care and Repair services help disabled homeowners or private sector tenants with adaptations that will enable them to stay in their own home.</p> <p>Borders Care and Repair offer help and assistance and can project manage the entire adaptation process.”</p>	<p>Western Isles have a Care and Repair representative on their integrated joint board overseeing the partnership</p>
		<p>North Lanarkshire discusses the need to review Care and Repair services as part of their action plan</p>
		<p>Glasgow, Inverclyde, East Renfrewshire, East Dunbartonshire & Dundee mention Care and Repair within the context of their HCS</p>

Given the immense strategic importance of these plans it will be important to improve the understanding of Care and Repair services among strategic commissioners across the country. If this is not achieved, the sector runs the risk of being well understood at Housing Contribution Statement (HCS) level and seeking funding in a Local Housing Strategy context, which will always be difficult given the pressures placed on Council budgets. The sector faces the risk of being less understood at Strategic Commissioning Plan level where there is perhaps greater potential for access to funding.

Whilst the i-hub review identifies some recognition of the contribution of Care and Repair services in shifting the balance of care in their local area, the analysis suggests that the sector has not yet been successful in influencing strategic commissioners of this potential. In future, it is acknowledged that Care and Repair services must seek to be recognised as a key delivery partner in Strategic Commissioning Plans.

On this basis, Care and Repair Scotland outline a number of specific activities to deliver Business Plan objectives including:

- Improving understanding of the role Care and Repair plays in delivering the National Health & Wellbeing Outcomes;
- Evidencing the benefits of Care and Repair to service commissioners;
- Strengthening the understanding of the benefits of Care and Repair services for NHS and Councils by encouraging collaborative working;
- Supporting local teams to engage effectively with health and social care agencies, and other stakeholders, in the co-production of local service frameworks;
- Advising and assisting Care and Repair services to understand the shift towards health and social care integration, exploring scope for involvement in joint commissioning; and
- Encouraging working with local NHS colleagues, social work staff and third sector bodies to identify where more cost effective forms of delivery are required.

4.3 Funding Care and Repair: challenges and opportunities

Whilst it is clear that the policy and funding environment for Care and Repair in Scotland has changed dramatically over the last decade, it is recognised that services should seek funding opportunities from a broader range of partners and seek opportunities to deliver income generating activities.

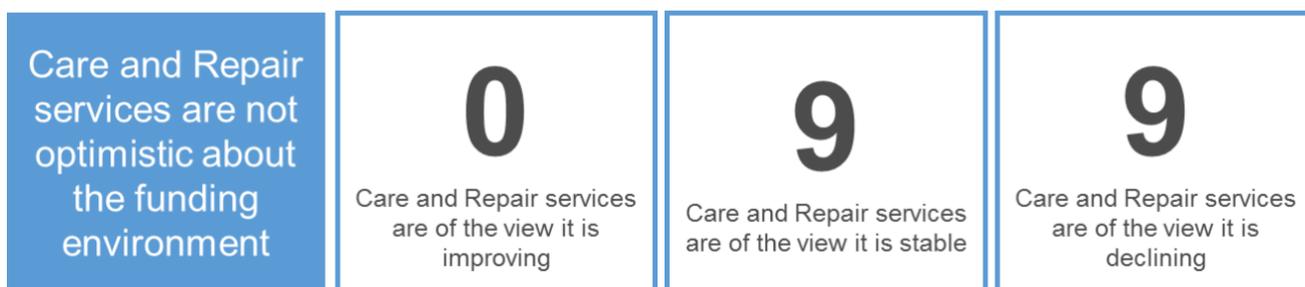
To explore the extent to which Care and Repair services have grasped this agenda, the 2017 Care and Repair survey attempted to build some intelligence on the funding routes and charging mechanisms adopted by across the sector. Care and Repair Services were asked to describe where their funding comes from, with responses as follows:

How would you describe where your funding comes from?	
Funded by Local Government	67%
Funded by Health & Social Care Partnership	33%
Other (please specify)	33%
Charitable donations	26%
Income from Chargeable Activity	26%
Funded by Scottish Government	19%
Funded through SLA with partners	15%
Funded by RSL	7%

Table 4.1: Sources of Funding

Respondents were able to tick as many funding sources as applied to them. Two thirds of services selected local government as the key source of funding, with a third (9 teams) indicating that they receive funding from the Health and Social Care Partnership. Interestingly, 26% (7 teams) indicate that they generate income both from charitable donations and chargeable activity.

A third of services specified the ‘other’ category, with detailed responses revealing funding from organisations such as the Life Changes Trust. Survey outcomes confirm that local government is still a major funder of Care and Repair activity, although there is evidence that services are accessing funding from a wider range of sources than may historically have been the case. Over and above this, the extent to which income is derived from chargeable activity is of interest, with at least 7 projects identified this as a source of income. The survey explored what percentage of income was generated from chargeable activity. It is perhaps not surprising that the majority of projects derive very little income from chargeable activity (74% less than 10% of their income). However, of great interest are two organisations that current derive between 26% and 50% of their income from charging. The role of charging as a means of growing the accessibility and availability of services might usefully be explored by the sector as a more diverse strategy for funding Care and Repair is developed.



Given this outlook, it will be important for Care and Repair services to develop innovative funding strategies to secure new and longer term resources. On this basis, the survey asked whether Care and Repair services had attempted to access any new funding streams in the past 2 years.

11 projects, 40% of services have made attempts to access new funding streams since 2015, including funding from:

- Integrated Care Fund
- Life Changes Trust
- Scottish Power Foundation
- LEADER
- Equity Release Pilot
- Chargeable Income
- Additional LA funding
- Scottish Government TEC fund
- Life Changes Trust Dementia Funding
- Trusts
- Utilities companies
- Fire Service
- Climate Change Fund

Clearly there has been substantial attention directed to identifying new funding streams by up to 40% of the sector. Whilst this evidence is very encouraging and indicates a creativity within the sector towards funding their activities, undoubtedly Care and Repair services need longer term funding arrangements to allow them to extend the scope of their work and develop new services in line with the health and wellbeing agenda.

4.4 Key Messages: how Scotland works in relation to Care and Repair

Whilst the sector makes a substantial contribution to enabling older and disabled people to live independently and well at home; it is acknowledged that Care and Repair has the potential to make a greater contribution in the future. To achieve this, services may need to look beyond the existing funding mechanisms, partnerships and service models that have been the bedrock of the sectors development and growth. Key messages include:

1. **Reliance on local authority funding will create risk:** The removal of grant funding for housing improvement work and the removal of ring fence to Private Sector Housing Grant has had a substantial impact on Care and Repair not just in terms of shifting the core activity profile of the sector towards property adaptations; but more crucially on the long term security of revenue funding from local government.
2. **Movement to health agenda:** It is important that Care and Repair Services are developed in a way that positively engages with National Health and Wellbeing outcomes, and convinces IJBs of their contribution to shifting the balance of care for older and disabled people. On this basis, it could be assumed that the role and viability of the sector has huge potential to be secured long-term.
3. **Engaging with strategic commissioners:** The extent to which Care and Repair features as strategic priority for Integrated Joint Boards (IJB) in Scotland remains unclear. In future, it is acknowledged that Care and Repair services must seek to be acknowledged as a key delivery partner in Strategic Commissioning Plans.
4. **Innovation:** Sourcing income from a broader range of funders and considering options to develop income generating services is likely to be an essential part of the future agenda for Care and Repair services. It is essential if the sector is to grow, develop and fulfil its potential in shifting the balance of care for older and disabled people. There is positive evidence that some parts of the sector are responding proactively to this agenda.

5 The Governance and Management of Care and Repair services

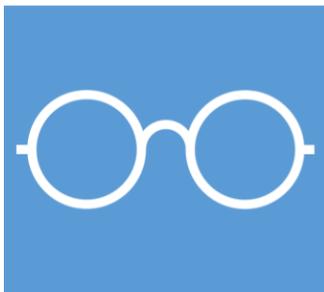
The importance of good governance and business management in ensuring the effective delivery of high quality Care and Repair services that meet identified need and deliver value for money, cannot be underestimated. The role of governance in offering robust scrutiny, encouraging accountability and supporting decision making on business management and organisational development; is key to ensuring that Care and Repair services innovate, grow and develop. Good governance underpins good business management. Having a sound approach to business planning and risk management is an essential component to good decision making at an operational and strategic level.

Chapter 5 outlines the most common governance arrangements in place across the Care and Repair sector in Scotland and highlights the limited progress in innovating and reviewing governance structures since the previous Good Practice Guide was published in 2011. Chapter 5 also provides good practice advice in terms of:

- **business planning;**
- **the role of the Care and Repair manager; and**
- **the employment, management and development of Care and Repair staff.**

5.1 Choosing an effective governance structure

Governance refers to the way in which a Care and Repair service is led, directed and controlled. Care and Repair Scotland's position on governance is aligned to the outcomes of the 2009 review of Care and Repair by the Scottish Government that concluded:



“...where practicable, all Care and Repair services (should) become self-governing operating either as a standalone project or as a subsidiary of a Registered Social Landlord”

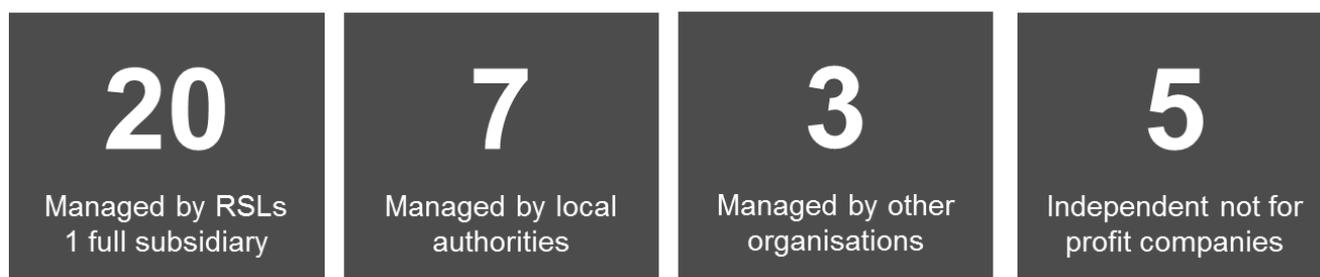
**Review of Care and Repair in Scotland, 2009
Scottish Government**

The governance arrangements of local Care and Repair services in Scotland vary greatly. 19 are managed by housing associations, 3 are managed by other organisations, 7 are part of the local authority, 1 is a subsidiary company of a housing association and 5 are independent not-for-profit companies. In line with Scottish Government recommendations, Care and Repair Scotland encourage managing organisations and funders to objectively review constitutional models and governance arrangements, and assess their relevance to the current environment. Support and assistance is available to local teams to move to a more self-governing status as the basis for growth and innovation.

The key advantage of self-governance is recognised as providing a separate governing board comprising of independent board members who can focus on the best interests of the Care and Repair service. Despite this, there has been no real progress towards this goal since the publication of the previous Good Practice Guide in 2011. Whilst there are practice barriers to independence governance for in terms in debt and pension liability, it seems there has been little actual energy devoted to progressing governance issues.

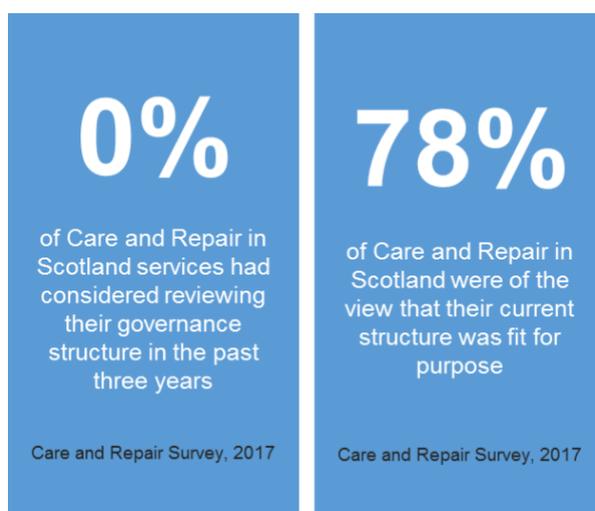


The governance arrangements of local Care and Repair services in Scotland vary greatly



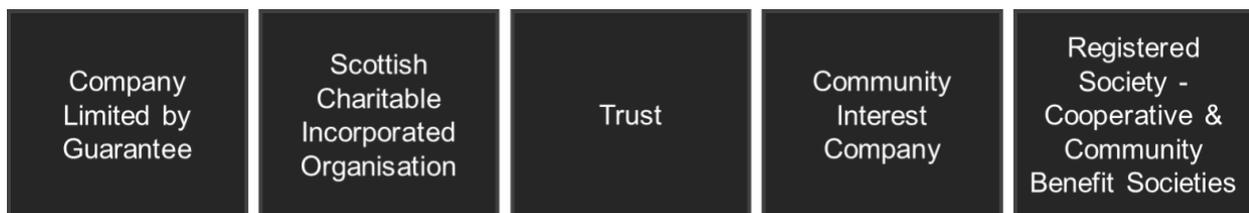
The 2011 guidance had envisaged projects reviewing their governance model periodically, perhaps exploring new vehicles like Social Enterprises or Community Interest Companies, however there has been virtually no activity of this kind. The vast majority of Care and Repair services remain fully managed by either a local authority or a Registered Social Landlord. This will provide an appropriate level of governance, management and accountability, however the remit of the governing board will be much broader than Care and Repair and there are significant questions about how much governing body time is devoted specifically to Care and Repair.

Decisions regarding the advantages of self-governance should be set against the benefits of delivering Care and Repair services within a larger organisation and should be made within the context of local circumstances and the best interests of the service. There is little evidence to suggest that projects have been posing these questions, indeed none of the participants in the 2017 survey had considered reviewing their governance structure in the past three years. Most, 78% were of the view that their current structure was fit for purpose.



There are significant changes taking place in the public policy architecture of Scotland which create new opportunities for Care and Repair services; including the potential for new relationships with Health and Social Care Partnerships. It is important that Care and Repair services regularly review their governance structures and choose the structure that can most effectively deliver their project aims. Local authorities and RSLs who fully manage Care and Repair services need to support this process of governance review and act in ways that best promote the purpose and aims of the Care and Repair sector.

Should projects wish to establish independent governance there are a range of models available to support this, including:



The governance model proposed by a Care and Repair service or any change to the model of governance currently followed, should form part of the business planning process carried out by the organisation.

Care and Repair committee member responsibilities are defined by the type of managing organisation that has responsibility for the Care and Repair service. If the Care and Repair service is managed by a Housing Association then the management committee of the Housing Association will have responsibility for strategy, policy, financial control and monitoring. Care and Repair services that are run in house as part of a local authority will be subject to the management structure of the local authority. Care and Repair services that have an independent governance structure will have their own independent management committee or board of trustees.

The provision of additional support and advice by a local advisory group can ensure that local priorities are met, although the function of such an advisory group should be clear. In circumstances where the chosen governance structure is management as part of a local authority or RSL, then serious consideration should be given to establishing a ‘local advisory board’. This will have the effect of overcoming some of the shortcomings of being managed from within a larger organisation and enable a sharp focus on Care and Repair to be maintained despite the competing priorities of the parent organisation.

This approach allows the service to be supported and developed by independent members of the community who offer advice on the day to day running of the service and provide a link between the managing organisation, Care and Repair staff, and the needs of the local community. An advisory group acts exclusively in the interests of the Care and Repair service and might consist of representatives from organisations working in partnership with the service. It is important that advisory boards have members with the correct mix of skills and that they are able to constructively contribute to the development of the Care and Repair service. It is important that Care and Repair service leaders embrace and value such external input and scrutiny.

5.2 Reviewing governance

It is best practice for committees or advisory boards to periodically review their governance arrangements and to compare their systems against existing Codes of Governance such as the “Charity Governance Code” published by the National Council for Voluntary Organisations. The code provides advice on issues such as: organisational purpose; leadership; integrity; decision making, risk and control; board effectiveness; diversity; and openness and accountability.

The National Council for Voluntary Organisations provide a Charity Governance Code which can be found at the following link :

<https://www.charitygovernancecode.org/en/>

The Scottish Council for Voluntary Organisations also provides guidance on good governance which can be found at the following link:

<http://www.scvo.org.uk/running-your-organisation/good-governance/>

Codes of governance such as the one published by the National Council for Voluntary Organisations are intended to be a resource that can be used by organisations to improve their governance structures by offering examples of efficient governance and guidance on how committees and advisory boards can govern successfully.

Periodic governance reviews are necessary in order to refocus the priorities of the Care and Repair service, to reframe the vision that the committee or advisory board has for the service, and to demonstrate to funders and other stakeholders that the service is well governed and efficient. Ultimately, good governance is critical to how Care and Repair organisations operate and are held accountable. It is therefore suggested that a governance review should take place approximately every three years. The following guidance sets out some issues a Care and Repair service should consider prior to and during a governance review:

- The purpose of the review should be clarified by the Care and Repair service;
- A timescale for the review should be determined by those involved;
- A consultation process should be undertaken with other stakeholders;
- A governance review sub group comprising board members and some individuals independent of the board should be set up if comprehensive review of the service is taking place;
- The issues that emerge during the review should form part of an action plan which should in turn set out short and long term actions in response to the review findings; and
- The action plan should comprise recommendations for change.

The end outcome of a governance review should be a clearer role for the management committee/advisory board and more empowerment to the staff team.

After the governance review the following principles should be adopted:

- The role and remit of the service should be established and documented;
- The services offered should be publicised and applied; and
- Governance arrangements should be reviewed regularly and in accordance with the needs of the organisation.

<p>Best practice in governance reviews</p>		<p>Care and Repair organisations should be self-governing if this is practical</p>
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All Care and Repair services should undertake a governance review every 3 years

If a governance review concludes that self-governance is not the way forward then it will be beneficial for the service to clearly document why this review outcome emerged

In circumstances where the chosen governance structure is management as part of a local authority or RSL, then serious consideration should be given to establishing a 'local advisory board'

This will have the effect of overcoming some of the shortcomings of being managed from within a larger organisation and enable a sharp focus on Care and Repair to be maintained despite the competing priorities of the parent organisation

The following key principles should be followed by management committees or advisory boards in the pursuit of good governance:

- The committee/advisory board should ensure activities are directed towards achieving the strategic objectives of the organisation;
- The committee/advisory board should ensure that the organisation's assets are used effectively;
- Financial accountability should be demonstrated through annual accounts prepared by an independent auditor;
- The best interests of stakeholders should be represented by the committee/advisory board;
- A committee/advisory board should be able to demonstrate to stakeholders that it works effectively;
- The Committee/Board requires to have a set of responsibilities that are distinctive from those held by the organisation's management team;
- The Committee/Board should be able to oversee the organisations activities in an effective manner;
- Committee/Board members should be elected on the basis of their skills and experience; and
- Committee/Board members should have access to ongoing training.

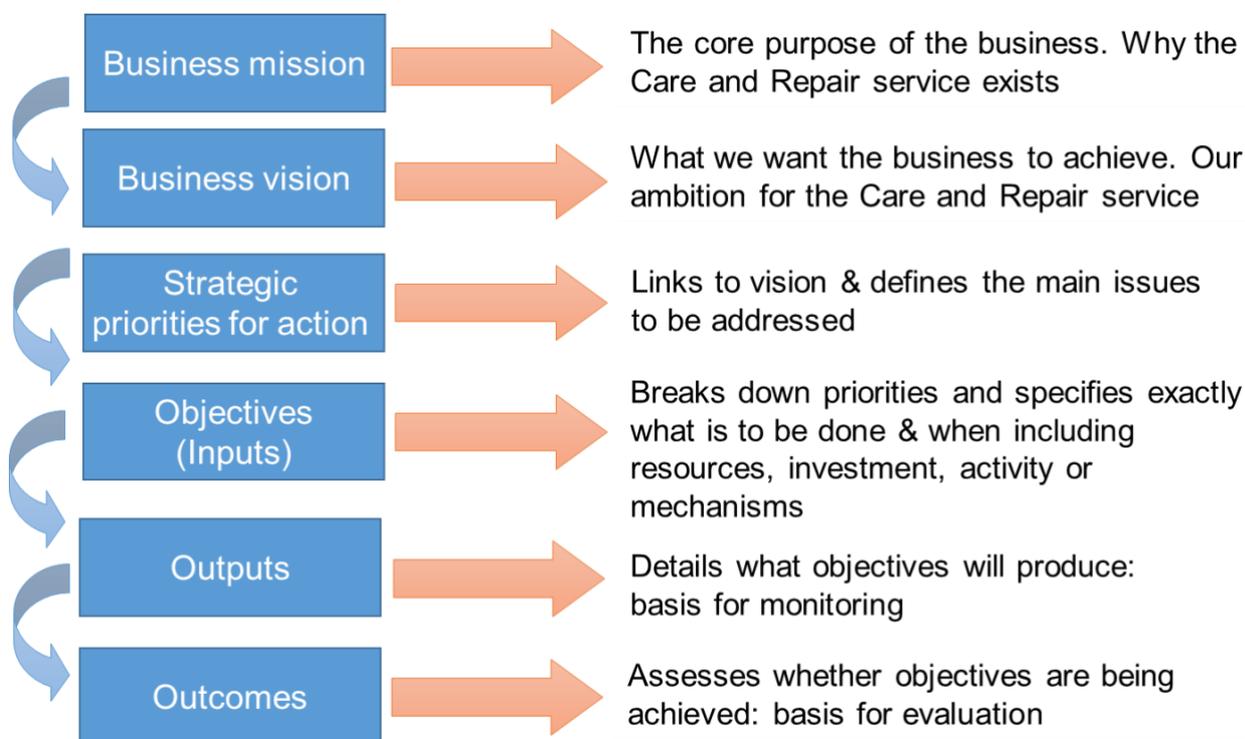
Where a Care and Repair organisation is managed as part of a local authority or RSL, the managing organisation should actively seek ways to pursue these good practice principles in the governance of Care and Repair services.

5.3 Building a business plan

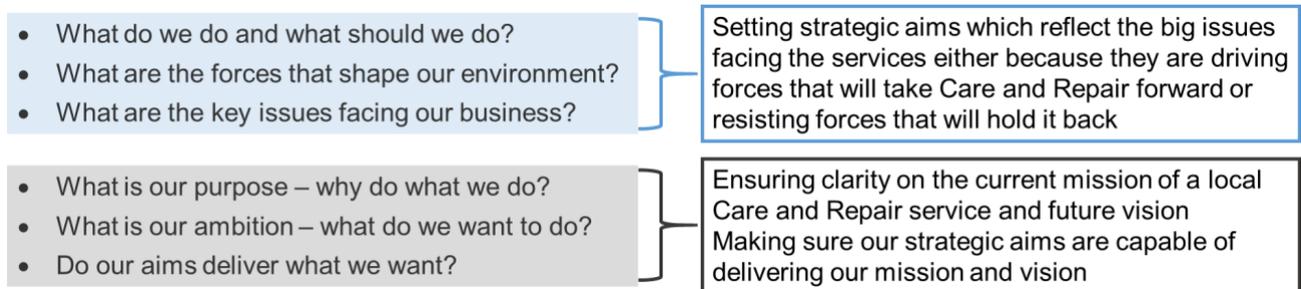
Care and Repair services are operating in an increasingly complex environment, both in terms of operational diversity and in terms of available funding. Care and Repair organisations will increasingly be required to be more innovative in developing funding solutions from a much wider range of partners and sources. There is great potential for expansion into new services and sectors which resonate with health and social care partnership commissioning, but this will only be achieved through vision, collaboration and detailed business planning.

In response to these changing circumstances, Care and Repair services require to set out their strategic aims and objectives in a business plan. The business plan is an important planning tool for Care and Repair services, both in running the business and in achieving organisational objectives.

The following strategy framework provides a good business planning structure enabling clarity on common purpose and ambition and ensuring that all strategic and operational activity is propelled towards meeting this purpose and ambition.



The key questions that committee members and staff need to be asking to inform the development of this strategy framework:



In order to be able to determine a clear and informed business strategy for a Care and Repair service, consideration will require to be given to:

- **The range of services it provides or would like to provide:** what core and ancillary services will be delivered to the community;
- **Analysis of local markets:** what services are currently being provided or require to be developed in the local authority area. What is the level of demand among older or disabled people for these services?
- **Identification of target markets:** clarification of the client groups that services are to be directed towards;
- **Identification and assessment of key partnerships;**
- **Identify the resource requirement and build financial projections:** what are the costs of running the service and what is the viability of the organisation?
- **Risk assessment:** what are the factors that could endanger service delivery or the viability of the organisation? How do we manage and mitigate these risks?

The business plan describes the route that the Care and Repair service intends to take now and in the future. It is a mechanism for senior staff and the management committee/advisory board to agree on strategic goals and objectives and to measure whether these have been met. It also provides stakeholders such as local authorities and the Scottish Government with reassurance that the service is meeting its objectives and is financially viable. A good business plan will also present evidence on the outcomes and cost effectiveness of funding Care and Repair services to local authority and Integration funding partners.

A key part of the process is working out if/how the strategy can be delivered financially. This will involve developing a clear understanding of the range of funding sources available, having realistic plans to successfully access that funding and ensuring the long term viability of the project. In the current environment that is likely to mean identifying new sources of funding, and taking innovative approaches to the creation of income generating activities.

The business plan should be translated into an operational plan for the organisation and in turn into individual performance targets for staff members to work towards. This way, ownership of the business plan occurs at every level of the organisation's staffing structure.

Business plans should be subject to regular review and testing. Scenario planning (exploring what may happen to affect the Care and Repair service and working out the likely responses), and stress testing (the impact on the organisation's business plan should there be major changes to assumptions) should take place on a regular basis and new opportunities and risks emerge. An annual performance review will compare organisational performance against the existing plan and will provide an opportunity to revisit the organisation's vision and objectives in the context of the coming year's plan. Approval of the annual business plan should coincide with budget approval for the coming year.

Ultimately, a business plan acts as a tool by which Care and Repair organisations can monitor their performance. Targets for organisational objectives set out in the business plan, along with the individual staff member objectives aligned to these objectives, can be measured on an annual basis during the business plan review.

Another useful resource for Business Planning is "Home Improvement Agency - Business Analysis Toolkit⁶" in 2015. The publication helps Care and Repair organisations to think through key elements of business strategy in order to help achieve their goals. The toolkit supports the development of business strategy focused on answering questions such as:



The report can be accessed by following the link: <http://foundations.uk.com/media/4427/business-toolkit.pdf>

⁶ Home Improvement Agency – Business Analysis Toolkit, Foundations 2015

5.4 The Care and Repair managers role

Care and Repair managers are passionate about the work that they do and the clients they serve. The role of Care and Repair managers may vary in accordance with the local context, scale of the team and governance arrangements. The extent to which Care and Repair managers are involved in day to day casework may also vary from organisation to organisation, with services that have a smaller staff complement often requiring the manager to be involved in day to day operations in addition to their wider duties. Having said this, there is a common purpose shared by all Care and Repair managers in that their principal objective is to deliver an efficient and responsive service to their clients.

Generally, the Care and Repair Managers role is structure around the following duties and responsibilities:

- To deliver the goals, visions and objectives of the organisation;
- To supervise and manage Care and Repair officers and other staff involved in delivering the service;
- To ensure the organisation's growth; and
- To deliver alternative courses of action in response to problems that may occur.

In delivering these duties effectively, good managerial practice is underpinned by the following skills:

- **Leadership skills:** giving direction so that Care and Repair staff can perform effectively and form a productive, goal oriented team;
- **Communication skills:** facilitating clear channels of communication and ensuring that the vision of the organisation is communicated to staff;
- **Interpersonal skills:** developing the trust and confidence of the Care and Repair staff team through coaching and supervision;
- **Planning skills:** clarifying organisational and team goals and assigning strategies for achieving these goals;
- **Appraisal skills:** evaluation of processes and procedures and deciding on the best course of action to produce the best outcome; and
- **Decision making skills:** Prioritising decisions in accordance with the importance of the issues facing the organisation.

The performance of the Care and Repair service depends upon the Care and Repair manager's ability to support, empower and develop team members. The performance of team members will depend upon their motivation, and it is the manager's responsibility to ensure that staff members are coached in a positive and supportive manner to achieve continuous improvement in the work they carry out for the organisation.

5.5 Employment and management of staff

The 2017 Care and Repair survey confirmed that the vast majority of services are small scale businesses with 1 in 4 having three or less Full Time Equivalent (FTE) staff. Over 50% of projects have 6 or less FTE staff and only 3 projects had 10 or more staff members. Undeniably, the approach to staff management and team development will vary depending on the scale of the business.

The business performance of Care and Repair services and good people management practices are closely linked. If best practice in employment is followed, then the abilities of employees are maximised to ensure that Care and Repair is a successful service. The basic principles of good practice in relation to Human Resources are as follows:

- Employees should be recruited fairly, equally, and in accordance with the law;
- Every staff member will have a contract of employment and a staff handbook summarising employment policies affecting the employee;
- Job descriptions and person specifications will be in place for all posts;
- Job descriptions and person specifications will form the basis of recruitment of new staff;
- New staff will be given a comprehensive induction at the beginning of their employment with the organisation;
- All staff will be subject to disclosure checks; and
- Staff will be provided with ongoing training and support including regular appraisals.

Staff development, through a supervision and appraisal process, ensures that staff performance is effective, organisational targets are met, and staff are developed and supported in their roles.

To ensure that Care and Repair services are delivered effectively and efficiently, employees require to have clearly set out work programmes, attend regular training sessions on topics that are relevant to their role, and receive regular feedback and support from their manager in relation to their performance.

Ideally, Care and Repair staff should work in an environment where they can continually develop their skills and receive support when work difficulties arise. Supervision sessions between staff members and their line manager held every 6 to 8 weeks can contribute to achieving this. Supervision sessions allow the staff member and their manager to:

- review current work programme issues;
- plan and prioritise future programme activities;
- deliver feedback and support to continuously improve performance; and
- ensure that the training and development needs of the employee are identified and met.

Issues that are discussed during supervision sessions can be linked back to the objectives set at the employee's appraisal.

A skills and training framework is essential to ensure that Care and Repair staff are equipped to carry out their responsibilities. Staff members are the most valuable asset of Care and Repair services, and as such, staff development and training is an important area of activity. The training needs of staff can be identified through a training needs analysis or through the appraisals process. Training courses can be either in house or external, and training outcomes should be monitored to establish whether the training needs of employees are being met.

The 2017 survey indicated that training needs analysis was well embedded in most projects. 97% of survey respondents confirmed that they had a training needs analysis for all staff, with only 2 projects did not have a training needs analysis for all staff.

The 2017 Care and Repair survey offered interesting insight into the extent and nature of training being delivered across the sector. In some ways, the results could suggest that training is not currently focused on the core Care and Repair delivery model but on emerging areas of service development.



More Care and Repair staff received training on dementia awareness in 2017 than on repairs and maintenance. This may of course be an indication that training needs analysis is targeting training towards areas for development rather than core Care and Repair skills which are well embedded in the sector. Graph 5.1 outlines the fill spectrum of training delivered to the sector in 2017.



Graph 5.1: Priority areas for staff training in the last 2 years

The most frequent area of training in 2017 has been in Dementia Awareness (70%). This illustrates the fact that the profile of dementia in the public policy agenda has increased and although there are few projects currently offering dementia services at the present time, this may well increase in the near future as the Care and Repair contribution to meet the needs of people with dementia is more widely understood by commissioners.

Whilst it is hugely important for training to focus on areas of emerging service provision where skills development may be required (e.g. dementia awareness, housing options, digital inclusion, hospital discharge and equity release); it will also be important to retain and update skill in core Care and Repair functions.

5.6 Key Messages: the governance and management of Care and Repair services

The role of governance in offering robust scrutiny, encouraging accountability and supporting decision making on business management and organisational development; is key to ensuring that Care and Repair services innovate, grow and develop. Key issues on the role of effective governance and business management include:

1. **Benefits of independent governance:** Decisions regarding the advantages of self-governance should be set against the benefits of delivering Care and Repair services within a larger organisation and should be made within the context of local circumstances and the best interests of the service. There are significant changes taking place in the public policy architecture of Scotland which create new opportunities for Care and Repair services; including the potential for new relationships with Health and Social Care Partnerships. It is important that Care and Repair projects regularly review their governance structures and choose the structure that can most effectively deliver their project aims;
2. **Need for regular governance reviews:** best practice advice suggests that all Care and Repair services should undertake a governance review every 3 years;
3. **Value of local advisory boards:** In circumstances where the chosen governance structure is management as part of a local authority or RSL, then serious consideration should be given to establishing a 'local advisory board'. This will have the effect of overcoming some of the shortcomings of being managed from within a larger organisation and enable a sharp focus on Care and Repair to be maintained despite the competing priorities of the parent organisation;
4. **Robust approach to business planning:** In response to these changing circumstances, Care and Repair services should set out their strategic aims and objectives in a business plan. A key part of the process is working out if/how the strategy can be delivered financially. This will involve developing a clear understanding of the range of funding sources available, having realistic plans to successfully access that funding and ensuring the long term viability of the project. In the current environment that is likely to mean identifying new sources of funding, and taking innovative approaches to the creation of income generating activities;
5. **Importance of people strategy delivered by Care and Repair services:** The business performance of Care and Repair services and good people management practices are closely linked. If best practice in employment is followed, then the abilities of employees are maximised to ensure that Care and Repair is a successful service. Staff development, through a supervision and appraisal process, ensures that staff performance is effective, organisational targets are met, and staff are developed and supported in their roles; and
6. **A skills and training framework is essential** to ensure that Care and Repair staff are equipped to carry out their responsibilities.

6 Care and Repair Services

Care and Repair services make a significant contribution to improving the health and housing outcomes of older and disabled people in Scotland. Whilst the service portfolio across the country is very diverse, there is a core service offer that reflects Care and Repair's common purpose. Having said this, the Care and Repair service offer is changing as local services form new partnerships and identify new ways to support the needs of Health & Social Care commissioners.

Chapter 6 outlines the extent, nature and diversity of the Care and Repair service offer across Scotland highlighting emerging service agendas or the delivery of solutions to meet local need or funding opportunities. Enabling access to core client groups and setting eligibility criteria for assistance is also considered.

Chapter 6 also provides good practice advice in terms of:

- **casework management;**
- **management and measurement of outcomes;**
- **customer feedback and satisfaction surveys; and**
- **managing complaints.**

6.1 Core Care and Repair services

Within the 2015 business plan, Care and Repair Scotland defines the core service offer delivered by the sector as follows:

***“Care and Repair services offer personal, financial and technical support to people facing the difficult task of repairing, improving or adapting a home which is no longer suitable to the person's needs. The provision of advice and information is a central part of Care and Repair's role, as well as providing practical assistance with grant applications and co-ordinating repairs. Care and Repair is a home-based and personalised service, which puts the client in control of decisions. Staff visit people at home and assist them through the entire process of deciding what work is to be done, arranging finance and organising the building works.*”**

Each case involves a different approach and often staff must cross disciplinary and departmental boundaries, working closely with health, housing and social work staff to achieve the overall aim of improving the quality of older and disabled people's lives through improving their housing conditions.”

Care and Repair services are locally based nonprofit making organisations that are managed either by a registered social landlord, are operated in house by a local authority, or are independently governed. The three principal client services that Care and Repair services deliver to their client group are as follows:

1. Advice and information

Care and Repair services will normally visit a client at home in order to assess their needs, and offer advice and information regarding repairs, maintenance, improvements and adaptations. The client will be assisted with the completion of relevant application forms, and further advice will be offered regarding the client's housing options and benefit entitlements.

2. Help with funding options

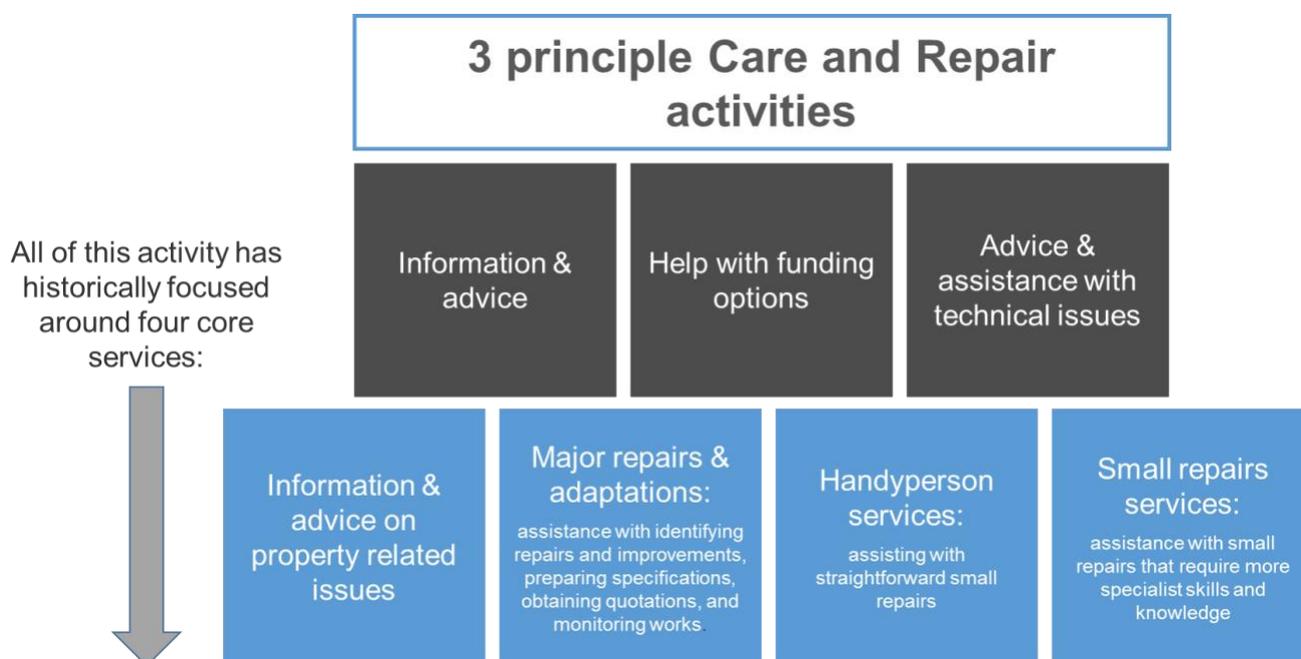
Clients will be given information by Care and Repair services about the financial options open to them including grants from local authorities and from other organisations (including charitable trusts). Advice will also be offered in respect to accessing loans and pursuing other means of raising funds for carrying out repair works such as accessing savings and participating in equity release schemes.

3. Advice and assistance with technical issues

Technical advice will be offered to the client by the Care and Repair service. Guidance on the likely work costs and practical assistance with project management tendering, appointing a reputable contractor, and entering into a contract will be given by Care and Repair staff. In summary, clients are generally offered:

- Professional information and advice relating to repairs, improvements and adaptations;
- Practical assistance in respect to pre tender specifications;
- Help with identifying funding options and determining the availability of grant funding;
- Advice and practical assistance with associated application forms;
- Assistance with income maximisation through benefit claims; and
- Practical assistance focused on co-ordinating the building contract and the provision of follow up services.

These three principle service activities are focused on 4 core service areas as follows:



In recent years there has been a downturn in the volume of major repairs work being carried out as a result of the removal of Private Sector Housing Grant funding for housing improvement work. The 2017 Survey now shows that the “core” of Care and Repair services in Scotland, that is, those services most commonly carried out by Care and Repair services are:

- Type 1 information & Advice – provided by 89% of respondent projects;
- Major adaptation – provided by 85% of respondent projects;
- Minor Adaptations – provided by 70% of respondent projects; and
- Small repairs – provided by 81% of respondent projects.

Advice and assistance with managing major repair is now only offered by 52% of Care and Repair services in Scotland (Care and Repair Survey 2017).

6.2 Wider Care and Repair service offer

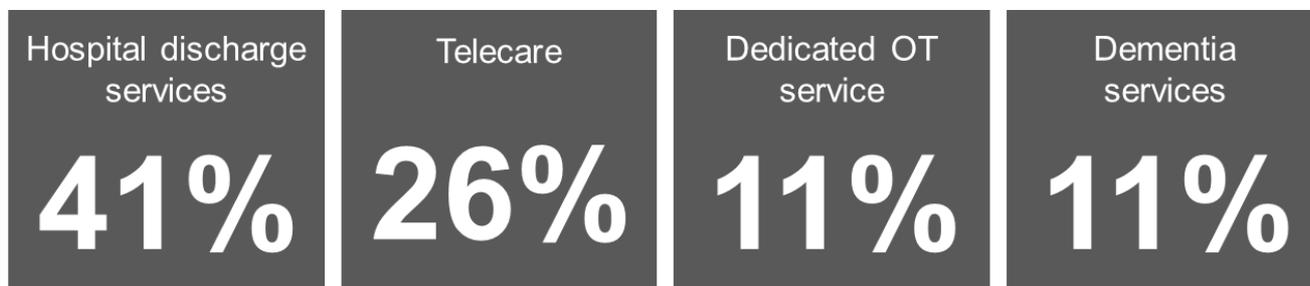
In addition to this ‘core’ Care and Repair services offer a broad range of services that assist home owners, private landlords, and tenants residing in the private rented sector. In addition to these services, Care and Repair services can and do provide a wide range of services such as:

- | | |
|--|----------------------|
| • Type 2 & 3 Information and Advice | • Home Security |
| • Hospital Discharge services | • Garden Maintenance |
| • Major Repairs | • Welfare Benefits |
| • Handyperson services | • OT Services |
| • Telecare | • Digital Inclusion |
| • Trades Referral: Trusted trader | • Equity Release |
| • Affordable warmth, energy efficiency | • Dementia Service |
| • Home Safety | |

These services are described in more detail below, however, it is important to note that all Care and Repair services will NOT provide all of these services. There is great diversity in the portfolio of services that each project will deliver.

However, over recent years the emergence of a range of services which are more clearly focused on the health & social care integration agenda has been notable. This is a welcome development since it enables Care and Repair services to enhance the sector’s contribution to enabling older and disabled people to continue living in their own homes for as long as it is safe and practical to do so. Crucially, this expansion of the core service offer could open up new funding streams, which support the achievement of national Health & Wellbeing outcomes.

These newer, integration focused services (and the proportion of Care and Repair services delivering them) include:



Care and Repair survey outcomes 2017

Although a minority of projects currently deliver these services, it is likely that an increasing number of Care and Repair services in Scotland could become successfully involved in this area of work while contributing to the delivery of core Care and Repair aims.

Beyond the core service offer outlined above, the Care and Repair sector in Scotland offers a diversity of services, with the most common outlined below. This diversity results from the operational independence that Care and Repair services enjoy to flexibly develop services that meet local need and maximise partnership and funding opportunities. Care and Repair services should regularly review emerging service developments and innovation across the sector; taking informed, strategic decisions about the optimum service offer to meet local need.

Adaptations

Housing adaptations delivered by Care and Repair services make an important contribution to supporting older people and disabled people to live safely, comfortably and independently at home. Examples of housing adaptations include:

- replacing a bath with a level access shower;
- improving access to the home by widening doors or constructing a ramp; and
- fitting lower work surfaces to make the kitchen easier to use.

These alterations are preventative measures. They help to reduce the number of emergency hospital admissions through falls and other accidents, and also reduce the need for home care or long-term admission to a care home.

Hospital Discharge Services

Care and Repair services are increasingly involved in services that enable clients who are currently in hospital awaiting discharge to return home quickly. This includes changes to the home environment including aids, adaptations and/or the installation of telecare devices, as well as improvement or repair work. It may also include advice and information on the range of housing options that may benefit the customer.

For example, the provision of a key safe allows health professionals to access a client's home and provide support following the individual's discharge from hospital. Other services such as the installation of adaptations such as grab rails provide further assistance to clients recently discharged from hospital.



Practice example

Hospital Discharge: Glasgow Care and Repair

Glasgow Care and Repair offer a Handyman, Home and Hospital Service to carry out small repairs and practical tasks to prepare the housing environment of customers being discharged from hospital. The aim of the service is to avoid a return to hospital and avoid delays in hospital discharge.

The handyman service is also offered to assist clients at home to carry out small repairs and practical tasks, which may prevent hospital admissions. The service is available to those who aged over 65 or those who have a disability. The concept behind the service is to enable people to live independently in their own home for as long as possible. All clients receive a 6 week follow up service to offer further assistance if this is required. The types of tasks that Handyman, Home and Hospital Service provides includes:

- Installation of a key safe to allow easier access for family and carers;
- Moving furniture to make space for equipment;
- Fitting banisters to aid movement;
- Secure cables and tack down loose carpets;
- Install a wireless bell; and
- Supply and fit hand/grab rail.

Project tasks are carried out by one employee Handyman and a team of volunteers. Anyone can make a referral into the service including family, carers, Occupational Therapists, Social Work and Health professionals. The service has been funded by Glasgow City Council and the Health and Social Care Partnership through the Housing Support for Older Persons Fund. The success of this service for Glasgow Care and Repair is dependent upon four factors:

- Early referral timescales to enable the property to be prepared prior to discharge;
- Communication with the hospital staff to give a regular updates on discharge planning;
- Robust information on the needs of the client, special instructions, contact details and emergency contact details; and
- Service capacity to respond to emergency requests.

This service provides a smoother transition back home following admission to hospital; as well as preventative solutions to avoid older and disabled people experiencing admission through unnecessary accidents that could have been avoided.

Home safety/security initiatives

A number of Care and Repair services have become involved in home safety initiatives, delivering home safety checks and the provision of advice to clients on home security, fire safety, and other health and safety matters. Some services also offer advice and assistance on managing uninvited callers and provide advice and practical help to ensure that clients feel safer at home. These initiatives are often operated in partnership with the police and fire brigade.

Trusted trader/trade referral schemes

Trusted trader/trade referral schemes are operated by a number of Care and Repair services who assemble and hold a database of reputable traders, used and approved by the service. Traders are then recommended or referred to clients who wish to carry out improvement work not covered by the core Care and Repair service offer.

Affordable Warmth Projects

Affordable warmth projects assist clients with the installation of efficient and economic heating systems and with property insulation measures. Clients receive home visits to establish the energy rating of their home and to assess what work is required to bring their accommodation up to an improved energy standard. Clients are assisted with applications for central heating installation work and for the installation of insulation. Should grant assistance be unavailable to the client, other funding options are investigated in order to facilitate the required work.

In house occupational therapy services

A number of Care and Repair services offer Occupational Therapy services on a 'one stop shop basis', often by directly employing an occupational therapist. This allows Care and Repair services to deliver the installation of adaptations in shorter timescales thereby, contributing towards reducing waiting list times. Some Care and Repair services are able to offer an adaptations service where all stages of the process can be carried out 'in house' including the assessment of client needs, assistance with applications for grant funding, coordinating the design and installation of the adaptation, and fitting additional minor adaptations and equipment through the handyperson service.

Small repairs and handyperson services

Small repairs services address repair work that clients cannot carry out for themselves or cannot afford to instruct, and support clients that have had difficulty arranging a suitable contractor. Typically, work carried out by small repair teams includes fitting security measures, insulation measures, and minor door and window repairs. Handyperson services are focussed on carrying out simple repairs that do not require specialist knowledge but contribute towards the safety, security and wellbeing of the client. Such repairs would include draught-proofing measures, putting up shelves and changing lightbulbs.

6.3 Care and Repair core client group

The core client group receiving Care and Repair services varies across local authority areas in Scotland. Although the principal client groups served by Care and Repair are older and disabled persons, there is diversity in the client group served by individual services. Some projects provide assistance to specific groups in addition to the traditional core client group.

The National Policy Statement says:

Care and Repair services are directed to older owner occupiers and crofters, aged 60 and over. However, in some areas services are provided to owners of any age with disabilities, and private rented sector tenants who are older or disabled.

Care and Repair Scotland will work to encourage the provision of Care and Repair services throughout Scotland to owners of any age with registered physical or mental disabilities.

So far as older people are concerned, and subject to the continued availability of resources, Care and Repair Scotland believes that it remains appropriate to focus on older owner occupiers, crofters and tenants (where they are responsible for the work in question) aged 60 and over.

This position is consistent with the National Standards for Care and Repair, first published in 2004, which acknowledge that access to Care and Repair services may vary across the country. Although the principle core Care and Repair target group is older and disabled persons over 60; different operational contexts may demand that the client group served is defined by local circumstances and could be influenced by factors such as:

- the conditions attached to Care and Repair funding; and/or
- service capacity issues, where surplus demand cannot otherwise be met by existing resources.

The strong values held by the Care and Repair sector in Scotland (including the strong commitment to service accessibility, personalisation, equality and diversity) make it challenging for the sector to consider limiting or prioritising services to core client groups. Given likely future pressures on demand, it is therefore increasingly important that service carefully consider how to either increase or manage service capacity in the context of a changing operating environment. This will be an essential element of enabling services to maximise their contribution to improving the health and housing outcomes of older and disabled people in the future.

6.4 Casework management

Care and Repair organisations offer a diverse range of services to clients who otherwise may have had to have accessed a number of different service providers if Care and Repair was not available to act as a single point of contact and lead agency.

The ethos of Care and Repair focuses on the delivery of a home based and personalised service than enable customers to make informed decisions. Core values of customer empowerment, choice, privacy and trust underpin a service delivery model focused on personalisation and achieving the best possible outcome for the client given their unique circumstances and needs. Advice and practical assistance offered to clients by Care and Repair staff is characterised by the following service standards:



At all times clients will know what services and support Care and Repair can provide

Clients will be encouraged to articulate what their needs are

Information on likely works costs will be given to the client at the earliest possible opportunity

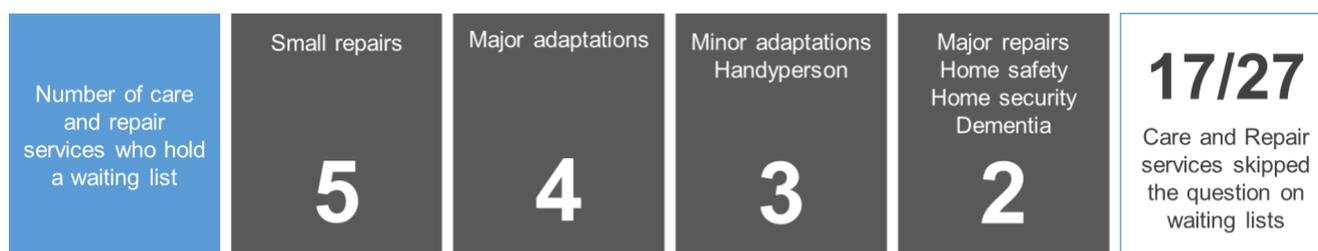
Consultation with clients will take place regularly in order to involve them at all times in the decision making process

Through the above actions, owners are encouraged to take responsibility for their properties

6.5 Access to services

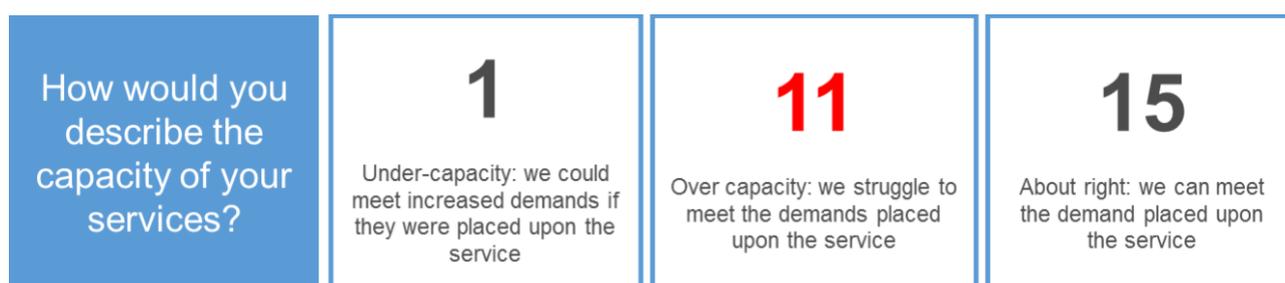
The 2017 Survey indicates that a substantial number of customer interactions and outcomes are managed by the sector, including 68,000 referrals in the year 2016/17. There were 59,000 home visits carried out and 61,000 cases completed across the sector. This indicates substantial demand for the types of services that Care and Repair services are providing. It is clear that demand for Care and Repair services is and will increase in Scotland given a growing population of older people in private housing and the public agenda which is focused on enabling independence at home. This raises important questions for the sector on service capacity and how the challenges of increasing demand will be proactively managed.

To assess the scale of this challenge, the 2017 survey posed questions on the extent to which services are currently using waiting lists to manage demand. Despite, the simple ‘yes/no’ format of this question, the majority of Care and Repair services (17/27) skipped the question. Of the ten projects who answered the question, the following results were obtained:



Of those who responded, just four services hold a waiting list of more than 100 clients, which suggests that the sector is currently very effective in managing the increasing demands placed on Care and Repair services, particularly in the context of a challenging funding environment.

Care and Repair services were also asked to assess the extent to which service capacity was stretched by increasing customer demand.



11 of the 27 projects surveyed indicated that they were ‘over capacity and struggling to meet the demand placed upon the service’. The majority of these services were larger in scale with, in fact, a greater volume of staff resources. It would appear that it is the larger services that are feeling most capacity pressures as a result of demand pressures. It is perhaps reassuring that 16 of 27 Care and Repair services assess themselves as “about right” (or indeed a minority “under capacity”).

Given the potential client base for Care and Repair services and the challenges associated with accessing revenue funding, greater resource pressures within the system may have been expected. It is important that all projects assess how they can have maximum impact on the core client group by ensuring that service capacity is capable of meeting demand.

It is likely that demand will continue to outstrip supply in the future. This is NOT solely a result of government policy or restrictions in funding, but it is also a huge reality given the demographic projections faced by Scotland. The population is aging, over 70% of older people in Scotland live in private housing and that will inevitably mean increases in demand for the services provided by the Care and Repair sector.

Managing service capacity issues and protecting full access to services is likely to be a major and ongoing challenge for Care and Repair services, for the foreseeable future. In a shift from the traditional operating model of the sector, services may require to develop a resource capacity strategy that reflects the challenges, pressures and opportunities in their operating environment. Options such as reviewing eligibility criteria, charging, new funding opportunities, new partnerships and/or developing a volunteering strategy are likely to be key considerations at a local level. Indeed, many Care and Repair services in the sector are proactively pursuing such options to build capacity and to continue to protect the principle of full service access to core client groups.

Given the growing population of customers who have the potential to benefit from the core Care and Repair service offer, it will be crucial that service leaders consider how Care and Repair resources can be (i) enhanced (to meet increasing demand levels); or (ii) managed (to direct resources to those in most need).

It is therefore essential that each Care and Repair service has a full understanding of the demand for each of its services and has a clear strategy in place for building service capacity and managing demand.

Doing more for less is and increasingly will be the day to day reality within the sector and so it is important that projects develop a practical framework for prioritising how (and to whom) interventions are delivered. The National Policy Statement recognises this when it says:

However, in the event that resources are reduced, local teams may need to consider whether to reduce any services they provide to those who are not owner occupiers or crofters, and whether to raise the qualifying age to 65, or even 70.

In situations where demand exceeds resources, and waiting lists build up, customers will need to be prioritised. Decisions in these cases should be based on an assessment of the extent to which there is a threat to independent living.

Ultimately, it is essential that eligibility criteria focuses on those in greatest need within the local community. Decisions about core client groups will be made by Care and Repair services on a local basis in accordance with local priorities and available resources. Clearly, the preferred option for managing demand is for more funding options to be available to increase the resources needed to manage demand. However, if may become a reality this is not the only option considered the sector. Other approaches include client group prioritisation, increasing capacity through volunteering and generating income through charging.

6.6 Prioritisation

There is a requirement for Care and Repair service providers to manage demand where the demand for services offered exceeds supply and available resources are limited. Where demand for the service is high, priority may be given by Care and Repair services to adaptation, repair or improvement work that prevents a threat to independent living or where a health and safety or home security risk is high. The prioritisation of client cases can also lead to a more efficient and effective delivery of Care and Repair services as the assembly of waiting list data may improve or enhance intelligence on the extent and nature of need placed on the service.

Although Care and Repair organisations may be concerned about the implications of excessive demand affecting the capacity of the organisation, it is essential that this does not lead to specific client groups being excluded from service delivery. While the management of demand is a better alternative to service restrictions, prioritisation systems must be transparent, understandable to the client, demonstrably fair, and efficient in their operation. A prioritisation system can also improve access to the service while targeting those most in need, as analysis of a structured waiting list will place a stronger focus on the most vulnerable and socially excluded client groups.

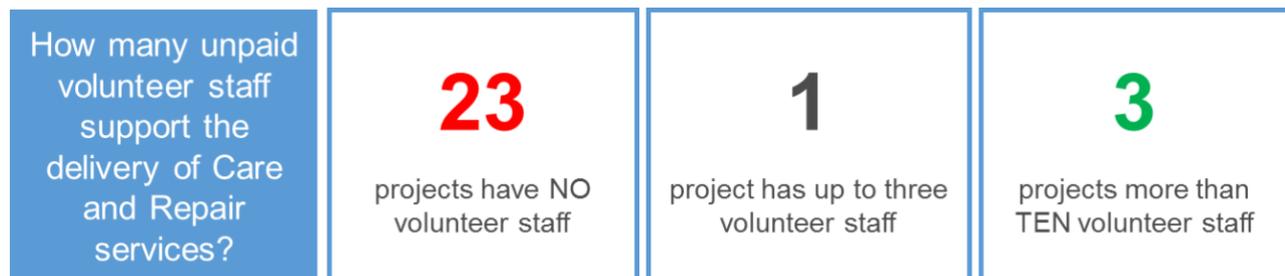
Waiting list systems can fall into the following mechanisms (or a combination of these). Typical mechanisms (and their advantages or disadvantages) can be summarised as follows:

- **Date order waiting lists:** These lists operate on a first come, first served basis and while simple to operate, they do not measure client need and are unable to ensure that those in most need secure services;
- **Points based waiting lists:** Such lists are collated by awarding points in respect to housing and health factors that are weighted according to the importance of the factors. For example, the highest points can be awarded in respect to serious disability and major property disrepair factors. It is important that such a system includes criteria relevant to prioritising need and that the weighting accurately reflects that priority;
- **Waiting lists based on group systems:** Waiting lists based on this system are characterised by clients being placed into group priority where each group represents a differing degree of need. For example, a high priority group may focus on those with severe health problems, a medium priority group may focus on health problems that are debilitating but do not significantly affect independent living, while a low priority group may focus on low level health difficulties. The order of priority within each group is then decided by waiting time. This system has the disadvantage that priority within the group is not determined by housing or health need factors; and
- **Waiting lists based on group plus points systems:** A waiting list based on this system draws on the advantages of the points and group systems described above. Client priority is determined by weighting housing and health criteria. This way, those most at risk of being unable to live independently in their own homes can be prioritised.

It is important that clients are aware of the rules accompanying the prioritisation system used by the Care and Repair service. Similarly, it is crucial that Care and Repair staff are familiar with the prioritisation system and can provide clients with clear information on the likely time it will take for their case to be prioritised and assistance provided. Regular reviews of the waiting list should be undertaken to ensure that the list is as up to date as possible and to advise clients of the estimated time they will have to wait. Clearly prioritisation is a positive way of managing demand where this is required. However other means of managing demand may include strategies such as volunteering.

6.7 Volunteering

Despite the very positive impact that a volunteering strategy may have on the resource capacity of Care and Repair service delivery, currently the sector in Scotland has not embraced a volunteering model to any great extent. The 2017 Care 7 Repair survey reveals that very few Care and Repair services have as yet accessed significant volunteering resources.



Of those responding, only four projects proactively utilising volunteer staff, with three projects using a substantial number of volunteers. The effective recruitment, training and deployment of volunteer staff will have the effect of making existing resources stretch significantly further and deliver greater value.

Care and Repair services should be encouraged to consider how a volunteering strategy could help to enhance service capacity and support managing increasing demand.

The Edinburgh Care and Repair service demonstrates clearly the positive impact that volunteering can offer service capacity.



Practice example

Volunteering network: Edinburgh Care and Repair

Edinburgh Care and Repair have 42 volunteers who carry out tasks that older people or disabled people cannot manage themselves and which enable them to remain independent and well at home. Due to the vulnerability of the client group, volunteers are trained in both dementia awareness and fire safety in order to help them carry out preventative support services in the client's home environment. Examples of the tasks volunteers carry out include:

- changing lightbulbs;
- hanging curtain rails;
- tuning televisions;
- setting up emails; and
- carrying out risk assessments, ensuring properties have smoke alarms & carbon monoxide alarms.

The volunteer service provides is a vital lifeline for older people and disabled people, not just in helping them perform practical tasks but in tackling isolation. Often volunteers sign post clients in need of additional support to other support services, in order to prevent loneliness and isolation.

The volunteer service is essential in improving and extending the service that Edinburgh Care and Repair can provide. The service notes that the more volunteers they engage, the more likely they are to receive donations which enables the project to deliver a wider service throughout the city.

An important factor in the success of the volunteer service is the feedback received from both clients and volunteers. This feedback offers important direction on how to improve and streamline the service.

6.8 Charging

Given the growth in the range and depth of Care and Repair services being delivered and given the increasing demand pressures placed on the sector, Care and Repair services should be encouraged to consider whether to develop a policy on service charges. The diversity of Care and Repair services has increased in recent years, with a greater volume of minor repair and preventative services on offer; it may be the case that an increasing number of clients would be willing to make a contribution to the cost of service delivery.

When charging for services, Care and Repair offices must ensure that they do not exclude any specific client groups from the opportunity to benefit from service delivery. It should of course be recognised that some clients simply do not have the financial capacity to make a contribution to cost. However, services should be encouraged to examine the options for delivering a fair and transparent charging policy, which may include means testing, minimum pricing and contributions based (not mandatory) charging mechanisms.

It is important to recognise that charging for services does NOT mean that Care and Repair services have moved away from providing a ‘not for profit’ public service. The application of an appropriate and measured charging system can in fact help to maximise the capacity of the ‘not for profit’ service to the benefit of a wider client group who do not have financial capacity to pay for assistance.

The Aberdeen Care and Repair service demonstrates clearly the positive impact that charging can make to income generation and service viability.



Practice example

Charging: Aberdeen Care and Repair

Aberdeen Care and Repair secured the contract for delivering the Care and Repair Services in 2012. Currently Aberdeen City Council does not fund all aspects of the service offer, and only partially funds others. A charging system is in place to cover the costs associated with the following services:

- small repairs service;
- gardening service;
- Homesafe (home safety/security); and
- professional fees for PSHG adaptations, which are not grant eligible.

The small repairs service is delivered to around 4000 households a year and is the most requested service. As local authority funding does not cover the cost of staffing to meet this demand, the only viable option is to charge customers for this service. The introduction of charges has allowed Aberdeen Care and Repair to develop services that requested by the client group. It was feared that charging would have a negative impact on the small repairs service but this did not happen. The service provides a safety net for clients that cannot afford essential repairs and can offer financial assistance through our charity.

Charges are calculated by looking at actual costs of employing tradesmen against the number of chargeable hours chargeable per tradesmen, less subsidy received by the local authority. The service only employs fully qualified tradesmen. All services delivered through the small repairs services are charged at the same hourly rate. Charging rates are as follows

- Clients on means tested benefits: £17.00 per hour plus vat;
- all other older and or disabled customers: £27.00 per hour plus vat;
- Housing Associations/local authority work: £32.00 per hour plus vat; and
- Materials are fully recharged with a 20% mark up.

Aberdeen City Council do not fund the service to support clients with grant eligible disabled adaptations on items such as sourcing charitable funding or a low cost loan to cover shortfall in grant funding or decanting clients whilst work is ongoing in their properties. Current charges for this type of service are set at roughly 10% of the works cost.

As a result of this charging policy, Aberdeen Care and Repair recover income in excess of £80,000 per annum, which accounts for almost 20% of the revenue income received by the service. The charging strategy is linked to the service business plan as set levels of income are required to cover forecasted revenue costs. Budgets are set for each main element of the service, using local authority funding as the base that wider services are built around and funded upon.

6.9 Customer Feedback and customer satisfaction surveys

Customer satisfaction levels are a clear measure of the effectiveness of Care and Repair services and provide a strong basis for the continuous improvement of services.

Care and Repair services can have a range of systems for determining client feedback. These can include feedback forms, surveys and customer forums, all of which allow service users to comment on current service standards and contribute towards the future development of service delivery.

Consultation with customers is also important to ensure that service delivery standards are being met and maintained. Satisfaction surveys should measure the gap between a client's expectations and their view on the level of service that they have received and should be carried out on a regular basis.

6.10 Managing complaints

If complaints are handled well, there can be benefits to the Care and Repair service and to the client. Care and Repair services can benefit from the complaints process by learning from the management process and using outcomes to improve processes, systems and staff competency. Complaints can highlight aspects of service delivery that Care and Repair staff may not have otherwise scrutinised, with opportunity arising for weaknesses in service delivery to be identified and addressed.

Customers benefit from a well-managed complaints process by receiving redress on their complaint and will ideally, in common with other clients, benefit from better service delivery in the future.

For the complaints process to work well, an effective complaints procedure should be in place in every Care and Repair service. The Scottish Public Sector Ombudsman (SPSO) has established the Complaints Standards Authority (CSA) to lead the development and implementation of simplified, standardised complaints handling procedures (CHPs) across the Scottish public sector. The CSA Website is called "Valuing Complaints" and can be accessed through the following link: <http://www.valuingcomplaints.org.uk/>

The SPSO 'Statement of Complaints Handling Principles' states that, an effective complaints handling procedure is:

1. **User-focused: it puts the complainant at the heart of the process;**
2. **Accessible: it is appropriately and clearly communicated, easily understood and available to all;**
3. **Simple and timely: it has as few steps as necessary within an agreed and transparent timeframe;**
4. **Thorough, proportionate and consistent: it should provide quality outcomes in all complaints through robust but proportionate investigation and the use of clear quality standards;**
5. **Objective, impartial and fair: it should be objective, evidence-based and driven by the facts and established circumstances, not assumptions, and this should be clearly demonstrated;**
6. **Seek early resolution: it aims to resolve complaints at the earliest opportunity, to the service user's satisfaction wherever possible and appropriate; and**
7. **Deliver improvement: it is driven by the search for improvement, using analysis of outcomes to support service delivery and drive service quality improvements.**

The detail of this statement can be found here:

<http://www.valuingcomplaints.org.uk/sites/valuingcomplaints/files/resources/principles.pdf>

SPSO Model Complaint Handling procedures can be found here:

<http://www.valuingcomplaints.org.uk/sites/valuingcomplaints/files/resources/Guidance-on-a-Model-Complaints-Handling-Procedure.pdf>

Care and Repair services should review their complaints management procedures against the SPSO 'Statement of Complaints Handling Principles' specifically and their Valuing Complaints advice more generally. The following points should be considered by Care and Repair services in developing and reviewing their complaints management procedures:

- **Frontline staff, who are often the first point of contact with a complainant, should be trained and empowered to deal with complaints;**
- **Clear guidance should be given to staff in respect to identifying what constitutes and what does not constitute a complaint;**
- **Staff require to be clear on what category of complaint they can act upon;**
- **High risk or high profile complaints must be managed by senior staff;**
- **Staff involved in the original complaint must not be involved in the investigation;**
- **A minimum acknowledgement timescale of 3 days and formal response timescale of 20 days must be achieved;**
- **Senior staff must take ownership of the complaints handling process and be accountable for the decision that is reached; and**
- **Staff should be able to inform clients of the process associated with an independent review of the complaint**

6.11 Key Messages: Care and Repair Services

Care and Repair services make a significant contribution to enabling older and disabled people to live independently and well in their own homes for as long as possible. Despite a diversity in the core service offer across local services in Scotland, there is a core offer which reflects the central purpose of Care and Repair.

Care and Repair services offer personal, financial and technical support to people facing the difficult task of repairing, improving or adapting a home that is no longer suitable to the person's needs. The core service offer focuses on the delivery of major repair, property adaptations and small repair/handyperson services although changes to the Private Sector Housing Grant regime has created a shift from the delivery of major repair towards property adaptations.

As new challenges are placed on the sector, Care and Repair services have responded proactively to develop new solutions which meet local need or commissioning priorities. Emerging services which resonate well with the health and social care integration agenda such as hospital discharge, dementia and specialist OT services are increasingly featuring as core elements of the Care and Repair service offer. This service development and diversification will be vital to the continued growth and development of the sector.

In terms of managing Care and Repair service, key messages are as follows:

- **Care and Repair is a home-based and personalised service, which puts the client in control of decisions.** Staff visit people at home and assist them through the entire process of deciding what work is to be done, arranging finance and organising the building works. These core principles are a perfect fit to the Scottish Government's housing strategy for older people – Age, Home and Community, which focuses on customer empowerment, personalisation and the delivery of preventive interventions;
- Subject to the continued availability of resources, Care and Repair services in Scotland will focus on **disabled people and older owner occupiers, crofters and tenants** (where they are responsible for the work in question) aged 60 and over;
- Given the growing population of customers who have the potential to benefit from the core Care and Repair service offer, it will be **crucial that service leaders consider how Care and Repair resources can be (i) enhanced (to meet increasing demand levels); or (ii) managed (to direct resources to those in most need);**
- **In situations where demand exceeds resources, and waiting lists build up, customers will need to be prioritised.** Decisions in these cases should be based on an assessment of the extent to which there is a threat to independent living;
- **Repair services should be encouraged to consider how a volunteering strategy could help to enhance service capacity and support managing increasing demand;**
- It is important to recognise that charging for services does NOT mean that Care and Repair services have moved away from providing a 'not for profit' public service. The **application of an appropriate and measured charging system can in fact help to maximise the capacity** of the 'not for profit' service to the benefit of a wider client group who do not have financial capacity to pay for assistance; and
- **Complaints can highlight aspects of service delivery that Care and Repair staff may not have otherwise scrutinised,** with opportunity arises for weaknesses in service delivery to be identified and addressed. Care and Repair services should review their complaints management procedures against the SPSO 'Statement of Complaints Handling Principles' specifically and their Valuing Complaints advice more generally.

7 Information and Advice

At the heart of Care and Repair services in Scotland is the provision of information and advice. Care and Repair services provide a diverse and complex range of information and advice services to customers in parallel with managing adaptations, repairs, property improvements, small repairs, and handy person services.

The Housing (Scotland) Act 2006 (Scheme of Assistance) Regulations 2008 provide local authorities in Scotland with powers to help owners and private tenants through the provision of advice, information and practical help (<http://www.legislation.gov.uk/ssi/2008/406/made>).

Despite the funding challenges associated with delivering the Scheme of Assistance (outlined in Chapter 4 of this Guide), Care and Repair services continue to have a central role in assisting local authorities with delivering Scheme of Assistance functions by providing information, advice and practical support to disabled and older people to enable them to live independently and well in their own homes.

7.1 General guidance on Information and Advice

Care and Repair staff are committed to providing effective and practical advice and information to clients. Depending upon customer circumstances, the general guidance that follows may assist in determining the how this advice and information is provided.

Guidance on Information and Advice

1. Clients should be encouraged to express what their needs are within the context of available resources
2. Clients require to be made aware of what choices they have in relation to the services available to them
3. Should adaptations work be necessary, clients should be briefed on the work process and any disturbance or inconvenience that may cause
4. The most accurate assessment of financial assistance and client contribution to the works cost should be given
5. Clients should be involved at all stages of the process to ensure that significant decisions are made with the clients consent
6. Clients should be updated on progress with the works at all stages and given copy correspondence where appropriate
7. Clients should have staff contact details and be able to contact Care and Repair staff should they have any questions about the ongoing process of arranging and carrying out the works
8. Care and Repair staff should be prepared to signpost a client onto another agency for further information and advice should that be necessary

7.2 Quality Assurance frameworks for Information and Advice providers

Care and Repair staff are not bound by a requirement to follow any particular quality assurance framework in relation to the provision of information and advice. However, given the importance of this function is to Care and Repair services it will be important for each team to have some means of understanding and assuring quality in the information and advice given. The 2017 Care and Repair survey indicates that whilst services utilise a range of quality assurance models, only one Care and Repair service is accredited under the 'Scottish National Standards for Information and Advice Providers'.

Despite this, the Scottish National Standards for Information and Advice Providers are the most common set of standards adopted by housing advice services in Scotland. The Standards allow organisations in the voluntary and public sectors to develop effective information and advice services which deliver value for money and positive customer outcomes.

The Standards provide a quality assurance framework for agencies that are involved in housing advice, money and welfare benefits advice, and debt counselling. Advice and information given by Care and Repair staff is likely to include some or all of the following, which contribute towards ensuring clients can remain safe, secure and independent in their own homes and communities:

- Visiting clients at home and listening to the repair, improvement or adaptation issue they have;
- Investigating and diagnosing the repair, improvement or adaptations issue, and where appropriate, establishing the technical nature of the problem;
- Working jointly with Occupational Therapists in relation to assessment of the client's needs;
- Advising clients and older and disabled persons in the community of projects and initiatives of relevance to them such as home safety, central heating and energy efficiency initiatives;
- Informing and advising clients of the options open to them in respect to grant availability, loans, and other sources of funding;
- Giving information on welfare benefits issues, and where appropriate, signposting clients to other agencies;
- Taking forward on behalf of clients, repair, improvement or adaptation projects from initial enquiry stage to completion of works;
- Advising clients on the small repairs and handyperson services offered by the Care and Repair service;
- Assisting and empowering clients to remain independent through the provision of good quality information and advice;
- Enabling the client to take informed action on their own behalf;
- Engaging with clients who are being discharged from hospital; and
- Discussing options with people with dementia and their carers.

There is therefore a strong fit between the information and advice functions of a Care and Repair service and the scope of the quality assurance framework provided by the Scottish National Standards for Information and Advice Providers.

Care and Repair services in Scotland should consider attaining accreditation under this framework to proactively demonstrate to commissioners, partners and customers the delivery of effective information and advice services which are value for money and outcome focused.

7.3 Types of Information and Advice Services provided by Care and Repair Services

The Scottish National Standards for Information and Advice Providers define three main types of advice and information provision. These are as follows:

- Type I – Active information, signposting and explanation;
- Type II – Case work; and
- Type III - Advocacy, Representation and Mediation.

Care and Repair services typically provide Type 1 or Type 1 and Type 2 advice services, although the 2017 Survey indicated that one service was also providing Type 3 information and advice services. Care and Repair Services that provide advice and information can choose to be included on the Scottish Government database of information and advice providers.

For staff giving advice on matters relevant to Care and Repair services the following housing specific adviser competences are important:

- 2.4: Disrepair in Rented Housing;
- 2.5: Housing Options; and
- 2.15: Repair & Improvement Grants.

Competency is measured in the same way across each functional area, with evidence of knowledge and understanding of each area a minimum requirement. Care and Repair Services should proactively define what role (if any) the National Standards will play in the delivery of their services.

Competency standards for the provision of housing information and advice were first produced in 1995 and have been periodically reissued to reflect legislative changes in the areas of housing, money, and welfare benefits advice. The Scottish National Standards for Information and Advice Providers: A Quality Assurance Framework 2009 is still in force, however Section 2 was reviewed in November 2016 and a new set of competencies identified.

Should Care and Repair services choose to follow the Scottish National Standards for Information and Advice, interpretation and implementation of the standards will depend upon the type of advice and information provided by the service. Care and Repair services can interpret the standards in accordance with the service provided, and this in turn is mirrored by the degree of flexibility within the Standards to allow for the different contextual situations in which advice and information is provided.

The Scottish National Standards can be found at the following link:

<http://www.gov.scot/Topics/Justice/policies/widening-access/standardsforadvisers>

The reworked section 2 can be found at the following link:

<http://www.gov.scot/Resource/0051/00513426.pdf>

Further advice can be found at the Scottish National Standards for Information and Advice Providers website: http://www.slabb.org.uk/providers/advice/Accreditation_Model.html

To attain accreditation of the Scottish National Standards for Information and Advice Providers, an organisation providing housing advice and information must be able to demonstrate that it meets the quality of service defined by the standards. Accreditation can be achieved after successful completion of an audit by an assessor. Type 2 and 3 Information and Advice will include peer review in the assessment process.

Care and Repair services wishing to become accredited require to achieve the following standards:

- General management standards;
- Standards for planning;
- Standards of accessibility and customer care;
- Standards for providing the service;
- Standards around competence; and
- Resourcing standards.

The Scottish Government has funded a new three year cycle (November 2016 – November 2019) in which advice providers can go through the new process for accreditation or re-accreditation for free.

Further details can be obtained at the link <http://www.gov.scot/Publications/2010/10/08154126/0>

7.4 Key Messages: Information and Advice

Information and advice provision on property adaptation, repair and improvement is at the heart of the Care and Repair delivery model. Seeking accreditation under the Scottish National Standards for Information and Advice providers will demonstrate to funders, partners and customers that information and advice services are effective; as well as providing a strong basis for continuous improvement.

The key messages are as follows:

- 1. Quality Assurance:** Given its central importance to the Care and Repair delivery model, services should have some means of ensuring that their information and advice services meet appropriate standards and quality;
- 2. National Standards:** Services should give serious and careful consideration to how it (and if) accreditation in the Scottish National Standards for Information and Advice Providers should be pursued; and
- 3. Standards Assessment:** Services should note that the Scottish Government have provided an opportunity to have free assessment and accreditation against the Scottish National Standards for Information and Advice Providers until 2019.

8 Performance & Quality Assurance: Why it's More Important than Ever Before

One aspect of the Care and Repair Scotland business plan 2016-20 has been the creation of an accreditation and performance framework to support local services to demonstrate value and efficiency to commissioners. A robust quality assurance framework and accreditation against it, will support Care and Repair services to evidence high levels of service and management to funders, partners and customers and is useful tool in building recognition of both skill and credibility.

A robust approach to quality assurance not only underpins good outcomes for customers, offering evidence for future improvement; it provides accountability and assurance to the commissioners who fund Care and Repair services. This chapter will therefore demonstrate the importance of Quality Assurance and Performance Management for Care and Repair services moving forward.

Chapter 8 considers the importance of a comprehensive approach to quality assurance and performance management to Care and Repair services by evidencing the contribution and quality of the sector offers to older and disabled people.

This is crucially important in a changing environment where funding is no longer guaranteed. In order to prove that Care and Repair Services are essential partner in delivering national Health and Wellbeing Outcomes, Care and Repair services should have quality standards and performance indicators in place to demonstrate their knowledge, skills and overall value.

8.1 Why is quality assurance important?

Quality Assurance frameworks are important for three main reasons; firstly, to provide good outcomes to customers; secondly, to provide continuous improvement and finally to provide accountability to commissioners. Quality assurance therefore enhances service development and provides credibility.

A quality assurance framework benefits customers as it:

- Provides consistency
- Assures quality
- Minimises problems
- Creates efficiency

A quality assurance framework supports improvement as it:

- Highlights problems
- Improves productivity
- Enhances viability
- Implements priorities

A quality assurance framework provides accountability as it:

- Proves value
- Proves skills
- Proves knowledge
- Proves development

There is an array of quality assurance frameworks that may be of relevance to the work of Care and Repair services that can be used in conjunction with other quality standards. Having said this, the Quality Mark Accreditation introduced by Care and Repair Scotland offers a tailored accreditation scheme focused specifically on the purpose, structure and values of the Care and Repair sector in Scotland. On this basis, all Care and Repair services in Scotland should aspire to attain accreditation to the Quality Mark standard.

The Quality Mark Accreditation proves that Care and Repair services are providing effective customer outcomes, have relevant information to improve services and are credible organisations.

Quality Mark framework can be used alongside other quality assurance frameworks but is particularly useful because it is designed and tailored for home improvement agencies.

The introduction of the Quality Mark offers the Care and Repair sector in Scotland the first formal quality accreditation system. Previously, the National Standards for Care and Repair services provided an informal quality framework, providing a series of benchmarks that services can use to benchmark service effectiveness and quality.

8.2 Informal quality assurance: the National Standards for Care and Repair Services

Despite its status as an informal quality assurance framework, the vast majority of Care and Repair services in Scotland comply with the 'National Standards for Care and Repair services'.

The 2017 Care and Repair survey evidences that 78% of the sector state that they comply with the National Standards for Care and Repair services.

The Scottish Executive produced the standards and guidance to accompany them in 2004 to ensure that there was a consistent quality of service delivery across the Care and Repair sector and to ensure uniformity of service standards across the country. The standards do not determine the way in which Care and Repair staff perform their duties, in order to allow teams to adapt to local circumstances, develop their own approach, and provide assistance in the way which best meets the needs of their local communities. The 9 standards set out below:

1. All Care and Repair services should clearly identify their target client group, what they can provide to these clients, and how clients can obtain access to these services
2. Any strategy for prioritising service delivery should be clearly set out and available to clients
3. All services should be committed to ensuring equality of access to the service to all those within the target client group
4. Care and Repair services should offer a client centred, individual approach, with clients having choice over the services received and how they are delivered
5. A clear written procedure for the initial assessment of clients' needs for the Care and Repair service should be in place
6. Outcomes of assessments should be clearly explained to clients, and where applicable, clients should be informed in writing of the services which Care and Repair can offer them
7. Where clients within the target group are denied access to Care and Repair services, a written explanation should be provided
8. A formal mechanism for appealing decisions regarding access to Care and Repair services should be in place, and clients should be informed of this
9. All Care and Repair services should have a policy in place for dealing with complaints and should ensure that clients are made aware of the complaints process

Although these standards were introduced by a previous Scottish Government administration and are no longer enforced, they offer a helpful self-assessment mechanism that can be applied by Care & Repair services to ensure that service delivery is effective and efficient.

Having said this, these standards do not offer a compliance or recognition system which tests the service against each standard, thereby enabling Care and Repair services to formally prove their value.

This framework is a good self-assessment for projects however in the operating environment for Care and Repair services today there needs to be a greater focus on proving the contribution, value and worth delivered both locally and nationally.

8.3 Formal quality assurance: Care and Repair Quality Mark Scheme

The Quality Mark Scheme implemented by Care and Repair Scotland is a robust accreditation scheme which provides reliable evidence on the skills, knowledge and effectiveness of Care and Repair services plus measure overall value and worth.

The Quality Mark scheme ensures that projects have an effective strategic governance and operational management system in place.

The accreditation process asks projects to provide evidence that it delivers at least a specific level of service. The evidence provided by the project is assessed by the Foundations Quality Mark team and each project receives a validation visit from Care and Repair Scotland. The following criteria outlines the areas which projects will be asked to reflect upon and provide evidence to show compliance:

<p>1. Minimum services from a Care and Repair Agency</p> <p>1.1 Access to Services 1.2 Range of Services 1.3 Caring Services linked to wider health and social care approach</p>	<p>2. Assessment of needs and delivery of a home based service</p> <p>2.1 Needs and outcomes based assessment 2.2 Involving others</p>	<p>3. Duty of care to clients & staff</p> <p>3.1 Health & Safety policy 3.2 Risk Management 3.3 Policies for protecting clients 3.4 Protecting staff 3.5 Multi-agency working for protecting vulnerable groups</p>	<p>4. Fair access, diversity and inclusion</p> <p>4.1 There is fair access to the service 4.2 The service is equitable</p>
<p>5. Privacy and Confidentiality</p> <p>5.1. Privacy and confidentiality</p>	<p>6. Listening to Clients</p> <p>6.1 Providing choices 6.2 Rights and responsibilities 6.3 Complaints procedure 6.4 Feedback from clients 6.5 Promoting independence</p>	<p>7. Forward planning and finance</p> <p>7.1 Business planning and advice 7.2 Continuous improvement in place</p>	<p>8. Staffing</p> <p>8.1 Employment practices 8.2 Competent staff</p>

If Care and Repair services identify that they have areas in which they need to develop, Care and Repair Scotland supports this development, by providing good practice and policy examples from other projects in the region. This is beneficial to programme prior to completing accreditation.

So far, the participation of the sector in achieving accreditation against the Quality Mark has been relatively low. Care and Repair Scotland anticipated that between 2015 and 2018 all projects would achieve accreditation in order to demonstrate a consistently high quality of service delivery and business management across each aspect of the framework.

The 2017 Care and Repair survey suggests that, currently just 22% (6 projects) have been awarded with the “Scottish Quality Mark-Care and Repair Accreditation”, with 56% of the sector currently without any accreditation against quality standard of any description. In the context of the current commissioning landscape and given the need for Care and Repair services to impress their credibility on funders, these findings are perhaps concerning. A lack of formal accreditation may place pressure on local services as they try to demonstrate the quality and value of services to funders where there is no accreditation in place.

Ultimately, it makes good business sense for all project to be aiming for Scottish Quality Mark Accreditation as it provides local commissioners, funding partners and customers with an assurance that services meet recognised national standards on governance, operational management and customer outcomes.



Practice example

Scottish Quality Mark: Lochaber Care and Repair

Lochaber Care and Repair along with Inverclyde Care and Repair piloted the Scottish Quality Mark Accreditation for Care and Repair services. The Accreditation is focused on home improvement agencies, and has been used as a benchmark to ensure that there is effective strategic governance and operational management systems in place to deliver service value and excellence.

Lochaber Care and Repair credits the Quality Mark Accreditation process with providing a range of benefits, including gaps in governance and strategic planning processes which have now been addressed. Maintaining the Scottish Quality Mark is now embedded with the operational management plan for the service which is now more closely aligned to the organisation’s strategic objectives.

Accreditation feedback has also been extremely useful in building and reviewing the business plan of the service. Since Lochaber Care and Repair Services have attained the Scottish Quality Mark Accreditation, the team have reviewed and updated the procedural manual for delivering the Scheme of Assistance by Care and Repair services in Highland, as well as introducing a customer handbook.

Crucially, accreditation has enabled the team to present clear evidence to commissioning agents, customers and potential funders that Lochaber Care and Repair offer a credible and effective service.

8.4 Performance management & the measurement of outcomes

Whilst Care and Repair Scotland recognises that quality assurance is vital in enabling services to evidence that they have an effective strategic governance and operational management system; underpinning this, will be the delivery of a robust performance management framework. Performance management is an essential component of continuous improvement and employee development ensuring that services are effective, efficient and delivering high quality outcomes to customers. It is of vital importance that services collect robust intelligence on service delivery, efficiency, cost and value in order to identify areas for improvement as well as evidencing overall contribution and impact.

Care and Repair Scotland has established a performance management framework capable of use by all Care and Repair services in Scotland. It is highly recommended that all Care and Repair services contribute to this Outcomes Framework as it gives the sector a clear way of demonstrating the national value of the Care and Repair sector. It enables clear communication about investment achievements and customers who have benefited from Care and Repair activity across Scotland. This kind of evidential approach will be critical to ensuring that Care and Repair is used to its full potential in the emerging public policy context.

The Outcomes Framework is able to evidence:

- the total costs of completed works and the apportioned revenue costs;
- number of jobs completed across each service category;
- number of referrals, home visits and completed jobs; and
- client reported outcomes.

If Outcomes Framework data can be assembled at a project and national level, providing a clear picture of activity and impact both locally and nationally, the ability of the sector to evidence and prove contribution to national Health & Wellbeing Outcomes will be significantly enhanced.

It is important that all Care and Repair services commit to making it work. The collation of reliable and credible information on outcomes will allow Care and Repair services to make strong bids for funding while retaining the confidence of local authorities, Integrated Joint Boards, the Scottish Government and importantly the customers that Care and Repair organisations serve.

In addition to this nationally coordinated outcome reporting, it is important for each Care and Repair service to consider how it can demonstrate its value to commissioners in a local context. There are a number of ways of achieving this and some projects have taken the approach of completing a “Social Return on Investment” calculation.

Care and Repair West Lothian can provide compelling evidence of the social impact of their services having applied the SROI model to customer and service outcomes.



Practice example

SROI: West Lothian Care and Repair

West Lothian Care and Repair have used the Social Return on Investment (SROI) framework as the basis of understanding the impact of the service using an established and credible framework. The outcomes have been used to enable service evaluation, to support future tendering and to inform dialogue with funders and commissioners.

SROI analyses the value that arises from changes to people's lives (and changes to other stakeholders) that are not normally captured in financial transactions. These changes, or outcomes, are described by stakeholders and indicators used to assess the amount of change stakeholders experience. Financial proxies are then used to place a financial value on these outcomes. The Care and Repair West Lothian SROI Report considered the social added value delivered through the total investment of £489,463 in the service from April to December 2011.

Following the SROI methodology and principles, the total present value of Care and Repair West Lothian from April to December 2011 was calculated as £2,218,458. The total invested to generate the total present value was £489,463. The SROI ratio is a result of dividing the total present value by the investment. This gives a social return of £4.53 for every £1 invested in Care and Repair West Lothian.

The Care and Repair West Lothian SROI Report was assured following an assessment carried by The SROI Network. The calculation has been highly successful in demonstrating the social value of the Care and Repair service, as well as driving the investment strategy for the service. Examples of how the process of identifying and engaging with stakeholders has benefited both the service and stakeholders include:

- **Funding and contracts:** the team have discovered dimensions to service delivery that we were previously not fully considered. This has the service access to wider funding sources and new partnership relationships;
- **Changed decision making:** the process has been incredibly useful in helping the team to evaluate and improve Care and Repair services, informing key decisions about improvement and delivery. An important realisation from the Care and Repair West Lothian SROI was that there was scope to improve relationships with the NHS and partnerships with other health and social care providers, and in particular making practical connections between our service and delayed discharge teams;
- **General monitoring and evaluation practices:** some principles of SROI have now been integrated into monitoring and evaluation practices. The team ask questions to establish baselines as a standard part of initial customer engagement, and include questions about 'difference made', rather than just outputs. This has improved impact measurement practices in general and allowed the service to integrate and embed impact measurement into service provision and evaluation rather than conducting one off SROI analysis;
- **Internal Communications:** One other less obvious benefit is the difference that SROI reports have made to staff morale. After being involved in the production of an SROI, stakeholder engagement or reading the analysis and case study material, staff feel less like a cog in a wheel and more conscious of the difference that they are making on the ground.

It is also likely that Care and Repair services will find it useful to measure service contribution to National Health and Wellbeing indicators as part of their strategy to influence and develop partnerships with Integrated Joint Boards and Health and Social care partners. It is therefore important that Care and Repair services consider how to measure performance and outcome in the context of National Health & Wellbeing Outcomes to understanding how the service fits into the National Health and Wellbeing Outcomes.

The Care and Repair Scotland business plan 2016-20, lists the National Health & Well-being Outcomes together with suggestions of how Care and Repair activity currently make an important contribution to enabling older and disabled people in private sector housing to live independently and well in their own homes. This useful framework provides a good starting point for Care and Repair services to consider how to evidence their contribution to Health & Wellbeing outcomes at a local level as part of their engagement with Integration partners and Health and Social Care commissioners.

National Health & Well Being Outcomes	The Care and Repair Contribution
People are able to look after and improve their own health and wellbeing and live in good health for longer.	<ul style="list-style-type: none"> • Providing a direct route to 'disadvantaged groups' through Care and Repair service contact. • Since earliest days, Care and Repair has delivered services that empower the client to make decisions about their home and long term future in the community. • The repair, maintenance and adaptation of the property is essential to provide a homely setting to allow people to develop a sense of belonging and provide a base to develop their personal lives, family and friendships.
People, including those with disabilities or long term conditions or who are frail are able to live, as far as reasonably practicable, independently and at home or in a homely setting in their community.	<ul style="list-style-type: none"> • Provision of adaptations across all tenures to maintain independent living. • Provision of full support service to enable people to repair their houses. • Provision of Small Repairs and Handyman Services. • Contribute to falls prevention, hospital discharge, technology and enabled care agendas. • Contribute to providing dementia friendly solutions.
People who use health and social care services have positive experiences of those services, and have their dignity respected.	<ul style="list-style-type: none"> • Longstanding track record of providing high quality person centred housing support services that are very highly rated by service users.
Health and social care services are centered on helping to maintain or improve the quality of life of people who use those services	<ul style="list-style-type: none"> • Care and Repair delivers services against a reporting framework that measures people's views about how interventions have improved their quality of life. • Ability to provide or signpost to independent housing advice and advocacy services.
Health and social care services contribute to reducing health inequalities	<ul style="list-style-type: none"> • Installation and maintenance of technology and enabled care systems, especially in rural areas. • Assisting with digital inclusion to owner occupiers in rural areas.
People who provide unpaid care are supported to look after their own health and wellbeing, including to reduce any negative impact of their caring role on their own health and wellbeing	<ul style="list-style-type: none"> • Care and Repair include family members and carers in casework discussions and can signpost to other support agencies.
People using health and social care services are safe from harm	<ul style="list-style-type: none"> • Working with Police Scotland and Scottish Fire and Rescue to install and maintain home security and fire safety equipment. Providing home safety checks.
People who work in health and social care services feel engaged with the work they do and are supported to continuously improve the information, support, care and treatment they provide	<ul style="list-style-type: none"> • Provision of formal and informal training to a wide range of health and social care professionals engaged in housing support activities • Scottish Quality Mark scheme provides accreditation of Care and Repair services.
Resources are used effectively and efficiently in the provision of health and social care services	<ul style="list-style-type: none"> • Joint housing and health commissioning of Care and Repair services • Improve joint working in resource use for planning in areas such as falls prevention and hospital discharge arrangements.

8.5 Other quality assurance systems

There are a number of other quality assurance frameworks that Care and Repair service providers could consider, given the diversity of the services and organisational structures evident across the Care and Repair sector in Scotland.

Care and Repair services should assess which quality assurance frameworks work best for their service offer and local operating context, ensuring that evidence a service which is well run, effective and delivering value.

The 2017 Care and Repair survey reveals that the sector uses a variety of quality and recognition frameworks to demonstrate quality, knowledge or value including:

- Investors in People (30%);
- Dementia Friends Scotland/ Dementia Friendly Communities (19%);
- Positive about Disabled People (19%);
- Investing in Volunteers (19%);
- Practical Quality Assurance System for Small Organisations (4%); and
- Scottish National Standards for Information and Advice Providers (4%).

The survey suggests that the most dominant Quality Standard in the sector is 'Investors in People' with 30% of projects holding this award. Investors in People (IIP) is a business improvement framework based on staff development. Assessment against the Investors in People Standard allows an organisation to measure its development and to focus on future improvements. IIP can provide assessment against their Customer Excellence Standard (an improvement tool which develops high levels of customer service standards) and the Public Service Improvement Framework (a streamlined approach to organisational development).

Further information on the services provided by Investors in People Scotland and other resources offered by them can be found at the following link: <http://www.iipscotland.co.uk/>

Dementia Friends Scotland and/or the Dementia Friendly Communities framework is being used by 5 of the 27 projects. This framework is aimed at raising awareness about dementia and to provide staff with more understanding of the interventions that can enable people with dementia to live independently and well. This framework educates staff about their responsibility to ensure that people with dementia feel understood, valued and are able to contribute to their community. Further information about Dementia Friends/Dementia Friendly Communities and other resources offered by them can be found at the following links:

<http://www.dementiafriendsscotland.org/>

https://www.alzheimers.org.uk/info/20079/dementia_friendly_communities

8.6 Key Messages: Proving contribution and quality

Care and Repair Services are diverse and changing as the demographic, public policy and commissioning frameworks around them evolve and shift. In an environment where funding is no longer certain, Care and Repair services will increase aim to develop new partnerships to source funding opportunities. A robust approach to quality assurance and performance management enables services to demonstrate credibility, value and excellence to commissioners and funders. Quality assurance is also key to continuous improvement and offering accountability to customers.

The key messages are as follows:

1. **Quality Mark accreditation** provides local commissioners, funding partners and customers with assurance that Care and Repair services meet recognised national standards on governance, operational management and customer outcomes;
2. **The National Standards for Care and Repair Services** are a useful self-assessment tool for services to benchmark service quality. Whilst there is wide spread use of these standards across the sector, this framework does not provide formal evidence of service effectiveness or credibility;
3. **A lack of formal accreditation may place pressure on local services** as they try to demonstrate the quality and value of services to funders where no formal accreditation in place. Quality Mark Accreditation provides evidence that Care and Repair services provide effective customer outcomes are continuously improving and credible organisations. All Care and Repair services in Scotland should give serious consideration to attaining formal accreditation under the Quality Mark scheme; and
4. **It is important that all Care and Repair services commit to making the Care and Repair Scotland Outcomes Framework work.** The collation of reliable and credible information on outcomes will allow Care and Repair services to make strong bids for funding while retaining the confidence of local authorities, Integrated Joint Boards, the Scottish Government and importantly the customers that Care and Repair organisations serve.

9 Adaptations and Occupational Services

Scotland's older population is increasing and with that increase the number of people needing support is likely to rise. An increased focus on prevention is seen as key to addressing the inevitable challenges that will result. The role of housing adaptations in supporting independent living is well recognised. However, the delivery of those adaptations is seen to be complex and driven by tenure as much as the needs of the individual. Resource pressures, and especially the need to make best use of public funds come into play. The Scottish Government has therefore been amongst those developing and supporting programmes of work focused on the housing adaptations process and maximising its capacity to improve individual outcomes. Some Care and Repair services have been directly involved in this analysis.

As outlined in Chapter 6, the shift in funding arrangements for Private Sector Housing Grant have had a significant impact on the core service offer of the Care and Repair sector, with services shifting workload from the delivery of major repairs to property adaptations. Care and Repair have therefore become a key delivery partner in maximising the impact that property adaptations can make to shift the balance of care.

Chapter 9 outlines the changing policy and commissioning framework for property adaptations and explores the opportunities that change may offer to the Care and Repair sector in Scotland, providing an overview of:

- **the new legal framework for aids and adaptations;**
- **the impact of integration on the funding and delivery of property adaptations;**
- **innovation and the Adapting for Change Programme; and**
- **partnership working between Care and Repair and Occupational Therapists.**

9.1 The new legal framework for aids and adaptations

The legal framework for the provision of some aspects of Care and Repair services has changed since the publication of the Government's Strategy on housing for older people. The integration of health and social care services is creating joined-up and seamless health and social care provision, aimed at delivering the Scottish Government's goal of the right care, in the right place, at the right time.

[The Public Bodies \(Joint Working\) \(Scotland\) Act 2014](#) requires each Health Board and local authority to delegate some of their statutory functions, and associated budgets, to their Integration Authority. The Integration Authority will be responsible for the planning and delivery of the related services using the entire delegated budget ("the integrated budget"); planning across the whole pathway of care to improve outcomes. All integrated arrangements (under new Health and Social Care Partnerships) were put in place by April 2016.

Outcome 2 of the [National Health and Wellbeing Outcomes](#) acknowledges the important role which housing plays in people's lives: "People, including those with disabilities, long term conditions, or who are frail, are able to live, as far as reasonably practicable, independently and at home or in a homely setting in their community."

Successful integration of health and social care services should enable more people to be cared for and supported at home or in a homely setting. This outcome aims to ensure delivery of community based services, with a focus on prevention and anticipatory care, to mitigate against inappropriate admission to hospital or long-term care settings. To underpin this, the range of local authority functions that must be delegated, includes aspects of housing support, aids and adaptations (equipment and adaptations). Functions relating to adaptations and equipment (aids) are part of a range of local authority functions that have been delegated to the new Integration Authorities.

The definition of what constitutes an “aid or adaptation” that must be delegated has been set out in the Adaptations, Aids and Equipment Advice Note (Scottish Government, 2015). This guidance is to ensure that what is considered to be an “aid or adaptation” is clearly defined and distinguished from other functions relating to housing or accommodation. The Advice Note defines an aid or adaptation as follows:

“aid or adaptation” means any alteration or addition to the structure, access, layout or fixtures of accommodation, and any equipment or fittings installed or provided for use in accommodation, for the purpose of allowing a person to occupy, or to continue to occupy, the accommodation as their sole or main residence;”

Local Authority functions relevant to the provision of aids and adaptations include:

- Housing (Scotland) Act 2001 section 92: and
- Housing (Scotland) Act 2006 section 71(1) (b), both of these functions, as specified in the Regulations, must be included in integrated arrangements to the extent that they are exercised in relation to the provision of an “aid or adaptation” (equipment or adaptation).

Care and Repair services can identify local authority (or Integration Authority) intentions for the future delivery arrangements under this new legal framework by examining their respective ‘Housing Contribution Statements’ which are often appended to the Strategic Commissioning Plan published by Health and Social Care Partnerships.

Generally however, the first iteration of these documents merely set out existing arrangements for Care and Repair services; although a small number flag up their intention to review such services. Some Housing Contribution Statements also highlight that there are some housing functions which are not delegated to Integration Authorities but which provide a resource to support health and social care integration objectives e.g. advice and assistant to older and disabled customers or private tenants and handyperson services, all of which can be carried out by Care and Repair.

9.2 Impact of integration arrangements on funding, delivery and commissioning

The introduction of the new legislation has created some uncertainty amongst some Care and Repair services. Integration authorities, along with their relevant partners need to consider how planning and delivery of services relating to adaptations can best be implemented for the benefit of all individuals assessed as requiring support. During 2016/17 Integration Authorities have been largely content to operate on a 'business as usual' basis for adaptation services while they focus on bigger budgets within Primary Health Care services. However, some reviews of aids/adaptation policies and procedures are underway in some parts of the country.

It is important to recognise that the Act and the Regulations set out where the responsibilities will lie in future for adaptations, **they do not prescribe the delivery arrangements**: these will be decided locally. Integration authorities will need to ensure, that in taking a person centred approach, as required by the Act, they plan and direct the delivery of adaptations that support preventative and anticipatory care.

The initial Strategic Commissioning Plans published around April 2016 mostly simply confirmed adaptation budgets and delivery arrangements in place at that time. Little or no changes were proposed at that point to Care and Repair services. In most local authority areas it will be the chief housing officer who is charged with shaping and influencing the arrangements for adaptations in their area and ensuring there is clarity about the role of Care and Repair services in relation to the Scheme of Assistance.

(Note: arrangements for the funding of adaptations for the tenants of RSLs are not included in the delegated functions under the Act and will continue to operate as before).

In practical terms this means that the following will change:

- The duty to assess for an adaption (as for equipment and other care related needs of adults) will be delegated to the Integration Authority. This is the work that in most cases is undertaken by occupational therapists in local social work departments; and
- The duty to provide grants of 80% or 100% for those living in the private sector, who are assessed as requiring adaptations, is still in place under the terms of the Housing (Scotland) Act 2006, and the associated Regulations: the duty is simply being delegated to the Integration Authority. Therefore, the planning for, and delivery along with the associated resource, will be the responsibility of the Integration Authorities, and will continue to be used in accordance with General Capital Grant conditions. There is also still a duty to provide advice and assistance under the Scheme of Assistance for those ineligible for a grant.

Ideally the Chief Housing Officer in each local authority should be engaged in discussions on health and social care integration and in particular the governance and strategic planning arrangements for adaptations. They should ensure that there is clarity about the respective roles of the Integration Authority and the local authority, and any others such as Care and Repair, in relation to the Scheme of Assistance. They should also recognise that the greatest change may in practice be with the local Care and Repair service, and producing leadership and support in the relationship with the Integration Authority.

The Adaptations Working Group (AWG) report of 2012, and the Scottish Government’s response, recognised that the current arrangements for adaptations are in need of substantial change and improvement. It was suggested that there is evidence that the provision of adaptations is becoming budget driven, and at odds with a person-centred and preventative approach. This is counter to the core principle of the Scottish Government’s vision for adaptations, which is that assessment and access to financial and other non-financial supports for adaptations should be equitable, fair, anti-poverty and compliment systems for self-directed support.

The AWG recommended the development of a tenure neutral approach, which places improved outcomes for the individual at the centre. Specifically the report noted that: “Leadership [from the local housing authority] would involve working with the new health and social care partnerships (HSCP) to:

- Develop a strategy which is “tenure neutral”, with clear outcomes and priorities for housing adaptations, and which complements and supports wider housing, health and social care strategies. This should be incorporated into the Local Housing Strategy, the Joint Commissioning Strategy and the Housing Contribution Statement.”

9.3 Adaptations Working Group and Adapting for Change pilots

In autumn 2014, partners were invited to submit applications to become a demonstration site to test the changes/improvements recommended by the Adapting for Change Working Group. Five sites were successful: Aberdeen, Borders, Falkirk and Lochaber with project work commencing in early 2015.

Adapting for change pilots focused on testing:



1. Improving partnership arrangements in relation to strategy, processes and governance
2. Service redesign to shorten timescales and enhance fast tracking
3. Improving communication and choice (and allied information and advice)
4. Developed a person centred approach

Specific tests of change carried out at a local level include:

Borders:	tenure neutral approach sharing budgets with RSLs
Aberdeen:	integrating TEC solutions, enhancing housing input to improve hospital discharge
Lochaber:	tenure neutral approach – one stop shops with direct access to a wide range of services
Falkirk:	developing standard tools, definitions and templates plus a joint outcomes and performance framework
Fife:	new approach to triage at the first point of contact and developing housing options to deliver a speedier more effective service

This approach was welcomed by Scottish Government and 5 Adapting for Change demonstration sites (Fife, Lochaber, Falkirk, Borders and Aberdeen) were put in place to develop and test key aspects of the approach recommended by the working group. The test sites have been [evaluated](#) and the evidence will be used initially to inform consultation with stakeholders and thereafter to shape new guidance. Care and Repair services played a prominent role in some of the pilots.

Findings from Adapting for Change Demonstration Sites

Housing adaptations make a vital contribution to supporting older people and disabled people to live safely, comfortably and independently at home. In doing so, they are a key preventative measure, helping to reduce the number of emergency hospital admissions through falls and other accidents. Timely interventions can support smooth hospital discharge, avoid unnecessary house moves and help maximise a person's ability to remain at home in their community with fewer care needs.

However, historically, the provision of adaptations has been complex and subject to inconsistencies across tenure and geographical/local authority area.

Lochaber planned specifically to redesign the existing **Care and Repair** service to deliver a local, tenure-neutral route to aids, adaptations and equipment. Care and Repair would therefore provide local leadership on behalf of statutory stakeholders. This development would hope to simplify and improve the customer journey and improve the ability to monitor outcomes and achieve best value across the partnership. A multi-agency review of data would be undertaken to prioritise areas for improvement. Commercial service opportunities would in addition be explored for clients not eligible under the Scheme of Assistance or participating in Self-Directed Support.

Scottish Borders aimed to further develop the **Care and Repair** service to establish a one-stop-shop approach for adaptations, to which individuals could directly self-refer. The assessment responsibility for adaptations would be transferred from the social work locality team Occupational Therapists (OTs) to the Care and Repair OTs, and further development opportunities would be taken with Registered Social Landlords (RSLs) locally to improve services for people with disabilities. Further information on the work undertaken by each test site is available from Scotland's Housing Network website at: <http://www.scotlandshousingnetwork.org/health-social-care/adapting-for-change/>. Information on the website focuses on capturing practice and learning.

Involving Care and Repair staff, Health, Social Care and Housing can help break down barriers, with people better placed to understand each other's roles and responsibilities. Holding multi-agency workshops with those involved in mapping and (re)designing service journeys for people with a range of needs, can help create enthusiasm for, and commitment to, the change process. It can also help build a consensus around the importance of developing and delivering person-centred service.

However, the 'Adapting for Change' test sites, delivered limited success in testing a 'tenure neutral' approach with a single funding pot. Despite the broad consensus that change was required, many key stakeholders also saw funding arrangements as an area in which their own test site had made limited progress; where some changes had been made, these were generally seen as beneficial but as not tackling the more fundamental changes that would be required to create a tenure-neutral approach.

The Evaluation of Adapting for Change (2017) noted that:

“Overall, it was clear that the AfC initiative has 'shone a light' on funding arrangements being at the heart of creating an equitable, tenure-neutral approach. While there have been positive changes - in terms of looking at ways of pooling housing association budgets in particular - more fundamental changes are yet to be tested.

Although views on this issue were both diverse and nuanced, there was a broad agreement that this will be a challenging area to take forward, particularly at a time when budgets are already tight and when people are concerned about the possibility of existing monies 'disappearing' into a Health and Social Care Integration pooled budget. Critically, and as across so many of the issues covered under this evaluation, concerns about the lack of focus on preventative services were central”.

More generally the evaluation report found that Care and Repair services are highly valued by service users and that the reputation, skills and capacity within the sector, make Care and Repair services an obvious host for a multi-tenure, person centred adaptation service.

“Irrespective of where located or how otherwise structured, the key component of the property adaptations service should be a person-centred, case-management type approach, with everyone having a named contact who also has oversight of their 'journey' through the system. Where this is already happening, and particularly when this type of service is being delivered through a Care and Repair service, evaluation feedback from service users was extremely positive”.

Care and Repair Scotland's assessment of the evaluation findings indeed recognise that local Care and Repair services tend to be cited as the most obvious 'host organisation' for such a service by key stakeholders and service users.

“The early intervention, person-centred type of approach required is seen as very much in line with the ethos behind Care and Repair services and with the skills and experience likely to be present in those services. Housing and third sector stakeholders were most likely to take this view but it was also expressed by a minority of social care and health stakeholders”.

Building on these findings, Care and Repair services should ensure that partnership and collaboration enables leadership from the local housing Chief Housing Officers to promote Care and Repair services as an obvious host for a multi-tenure, person centred adaptation service with Integration Authorities.

9.4 Partnership working: Care and Repair and Occupational Therapy services working

Occupational Therapy is the single professional group providing services and support to service users across both Health and Social Care, working with and across all care groups, age ranges, and conditions.

College of Occupational Therapy defines OT as follows:

Occupational Therapy takes a whole person approach to both mental and physical health and wellbeing, enabling individuals to achieve their full potential. Occupational therapy provides practical support to enable people to facilitate recovery and overcome any barriers that prevent them from doing the activities that matter to them. This helps to increase independence and satisfaction in all aspects of life

Occupation relates to practical and purposeful activities that allow people to live independently and have a sense of identity. This could be essential day to day tasks such as self-care, work or leisure

Occupational Therapy provision is historically organised very differently across the Health and Social Care Partnerships with a separation and/or different emphasis of role within the different agency settings. Integration of health and social care provides the opportunity to look at how the role of OT can be streamlined, and this key and valued group of staff best utilised, to support the HSCP's effectively deliver Strategic Commissioning Plans. Joint working between Occupational Therapy services and Care and Repair services is important as requests for adaptations cannot be processed without a recommendation from an Occupational Therapist.

During this time of review of Occupational Therapy services within the new Health and Social Care Partnerships it will be important for Care and Repair services to both track any changes and/or try to engage in such discussions at partnership level.

In common with Care and Repair services, Occupational Therapists promote independent living by putting the client at the centre of service provision and in turn make a significant contribution to the governments health and wellbeing agenda.

Care and Repair officers are skilled in ensuring that adaptation work is completed without unnecessary delays as they are able to advise Occupational Therapists about the adaptation work in relation to technical aspects of the property. By assisting clients to select reliable contractors and by project managing the work, Care and Repair officers can support the client through the adaptation process, allowing Occupational Therapists to focus on the assessment of other individuals, allow waiting times to be reduced.

Partnership working between Care and Repair services and Occupational Therapists is critical to the successful delivery of Care and Repair services. Occupational Therapists and Care and Repair staff will be involved in joint assessment visits, joint site meetings, and post completion visits, and work together for the benefit of the client.

Although Care and Repair services in Scotland are not subject to a regulatory requirement in respect to meeting target timescales for carrying out adaptations work, it is in the client's interest that such work is carried out as quickly as possible. The Department of Communities and Local Government (DCLG) have established guidance on time targets that may be useful to staff working for Care and Repair services in Scotland.

While the DCLG [good practice guide](#) on delivering adaptations to disabled people acknowledges that setting time targets is difficult, they have set indicative time targets expressed in working days according to whether the adaptations assessment is ranked high, medium, or low. Within the overall indicative time target there are specific time targets for particular tasks such as carrying out an assessment, tender return and time on site for example. The total of these specific time targets makes up the overall time target.

Care and Repair services may wish to consider developing their own targets based on local circumstances or to benchmark adaptations timescale performance against other Care and Repair services.

9.5 Further information and assistance

A range of Guidance has been produced in order to help facilitate the integration of health and social care. It is important that Care and Repair services are both aware of the change process underway at present and are able to contribute to the shape of these integrated services during any review processes in their respective areas.

A link to additional guidance notes and information is therefore provided below both on the aids and adaptations process and wider strategic planning that Care and Repair services may have the opportunity to be involved in.

[Adaptations, Aids and Equipment Advice Note \(April 2015\)](#)

[Strategic Commissioning Plans Guidance \(Dec 2015\)](#)

[Good Practice Guide and Self-Evaluation for the provision of Major Adaptations](#)

[Guidance on the Provision of Equipment and Adaptations \(Jan 2011\)](#)

[Good Practice Guide and Self-Evaluation Tool for the Provision of Community Equipment](#)

[Housing Advice Note \(Sept 2015\)](#)

9.6 Adaptations and occupational therapy services: key messages

The role of housing adaptations in supporting independent living is well recognised. However, historically, the provision of adaptations has been complex and subject to inconsistencies across tenure and geographical/local authority area. Resource pressures, and especially the need to make best use of public funds come into play.

The Scottish Government has therefore developed and supported programmes of work focused on the housing adaptations process and maximising its capacity to improve individual outcomes. A key aim of the Adapting for Change agenda is the delivery tenure neutral approach, which places improved outcomes for the individual at the centre. As major delivery partners of property adaptations and in the context of pilot evaluation findings which suggest that Care and Repair services could become an obvious host for such services; the sector should carefully consider how to promote the capacity and expertise of local teams in influencing local authority and IJB commissioners.

Key issues are as follows:

- Functions relating to **adaptations and equipment (aids) are now part of a range of local authority functions that have been delegated** to the new Integration Authorities;
- Ideally the Chief Housing Officer in each local authority should be engaged in discussions on health and social care integration and in particular the governance and strategic planning arrangements for adaptations. It is therefore **important that local teams are proactively involved in the development of Housing Contribution Statements to ensure that the role and expertise of Care and Repair services** as a key delivery agent for adaptations is clearly recognised;
- The Adaptation Working Group recommended the development of a tenure neutral approach “with clear outcomes and priorities for housing adaptations, and which complements and supports wider housing, health and social care strategies”. Two Care and Repair services were directly involved in Adapting for Change pilot activity to test the extent to which this model could be delivered in practice;
- **The ‘Adapting for Change’ test sites delivered only limited success in testing a ‘tenure neutral’ approach** based on a single funding pot. Whilst some positive changes to funding adaptations could be identified, fundamental change to create a tenure-neutral approach has yet to be achieved;
- **The Adapting for Change evaluation found that Care and Repair services are highly valued by service users** and that the reputation, skills and capacity within the sector, make Care and Repair services an obvious host for a multi-tenure, person centred adaptation service;
- Care and Repair services should ensure that partnership and collaboration with local authorities supports and influences service leaders to **promote Care and Repair as the obvious host for a multi-tenure adaptation service with Integration Authorities;** and
- Partnership working between Care and Repair services and Occupational Therapists is critical to the successful delivery of Care and Repair services.

10 Care and Repair: The Future

Within the next 20 years, the demographic environment will be one where more than 1 in 3 of Scotland's population will be aged 60 or over. As the public policy agenda develops in Scotland to meet the needs of this population, Care and Repair services must proactively ensure that the contribution they make in enabling older people to live independently and well in their own homes for as long as possible, is promoted and recognised by strategic planners, funders and commissioners.

In this context, Chapter 10 considers the Care and Repair service of the future examining:

- **the role of service development and diversification;**
- **the concept of 'the collaborative home improvement agency' as a blueprint for the future;**
- **current pilot activity and innovation in Scotland; and**
- **the need for partnership, collaboration and stakeholder engagement.**

10.1 Drivers for change

Demographic, public policy and commissioning changes in Scotland places both challenges and opportunities on the Care and Repair sector in Scotland. By 2050,⁷ it is projected that the proportion of Scotland's population over age 75 will rise to 16%, with 913,000 people in this age group. Equally, the 60-74 age group will peak in 2030 at 19% of the population (1,065,000 people). Over this period an increasing number of older people will require care and support, while the working population funding that care and support will be in decline.

Taking into consideration that the costs of providing care and support for older people will increase substantially over time, Care and Repair services are in a unique position to contribute in a cost effective way towards ensuring older people remain in their own homes without the need to move to specialist accommodation or residential care. Care and Repair services are also in a key position to assist with meeting the increasing demand for adaptations both in respect to older disabled persons and disabled persons of any age. As outlined in Chapters 2-4 of this Guide, core Care and Repair activities are likely to make a substantial contribution to reducing the costs of providing care services in Scotland.

Care and Repair services are also at the forefront of providing advice, small repairs and handyperson services, and delivery of these services makes an essential contribution towards ensuring that the housing needs of older and disabled persons are met. Given that people in Scotland are living longer, healthier lives, and that older persons will constitute an increasingly greater proportion of the population, there is a government expectation that service delivery to a larger population of older persons will be accompanied by increased quality and standards. The skills of Care and Repair staff and their practical expertise, the established network of clients that could be used as a focus for the provision of wider care services, as well as the reputation and trust associated with the Care and Repair brand; undoubtedly, the sector can make a substantial contribution in improving the delivery standards and mechanisms that service older people in Scotland.

⁷ Age, Home and Community – 5 Year Review 22/02/17 Pg14

In addition to the core service offer, as outlined in Chapter 6, many Care and Repair services have developed a range of other initiatives that meet the needs of the client groups they work with.

To ensure that Care and Repair organisations maintain their place at the forefront of service provision to older and disabled people, it is important that Care and Repair services in Scotland explore options around diversification. Such diversification does not mean that core services need to be neglected and that service delivery will be diminished. Diversification of services can take place without the traditional role and ethos of Care and Repair being compromised.

If Care and Repair organisations can become involved in delivering a broader range of services, then rather than services being diluted, Care and Repair will remain at the frontline of service delivery to older and disabled clients over a diverse range of activities. The advantage of this approach is that clients in need are able to access a more diverse range of services than before, benefiting from services that further enhance their safety, wellbeing and independence. If the target client base is widened through pursuing other initiatives, then the income received through these activities can be reinvested into core activities improving the overall financial viability of the service.

10.2 Care and Repair services: future directions

The need to develop and diversify Care and Repair services is echoed by Foundations, the national body for Home Improvement Agencies in England who have produced, ⁸*"The collaborative home improvement agency"* (CHIA) as a guide for Care and Repair services on how services will be commissioned and delivered in the future. Whilst this guidance is set in an English context, it is a useful piece of work which can help the Care and Repair Sector in Scotland to reshape its services in ways that are future proofed and attractive to funders.

The report acknowledges that the next decade will see dramatic growth in the number of older people seeking help to remain at home as long as possible, whilst conversely local authorities face continuing pressure to reduce costs and seek efficiencies. The vision that the CHIA report promotes is one where local Care and Repair services, *"become an integrated piece of a much larger jigsaw of resources, products and services which can be deployed to keep a person living healthily at home."*

There is a recognition that Care and Repair services cannot remain separate and should instead actively seek out partner agencies and services which can open up new markets without demanding dramatic change to their main activities, areas of expertise or staff competencies. The report argues:

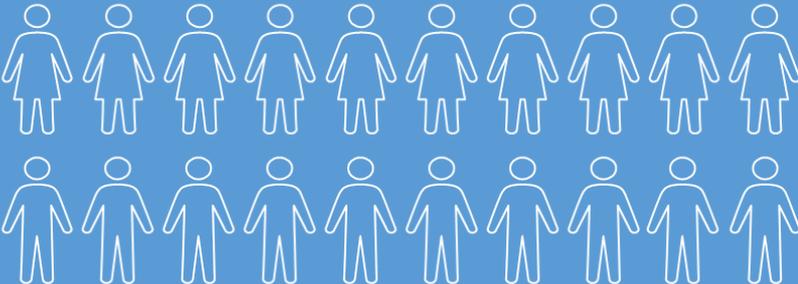
"...that collaboration will help the sector to keep doing what it already does well. Its core strengths remain the holistic casework-based assessment of people's housing needs and aspirations, as well as the expertise in making changes to the physical fabric of the home. Beyond that, everything else might change - organisational structure, client mix, funding sources, and type of services offered. To be successful, the collaborative Home Improvement Agency must revisit all its key business relationships - with customers, commissioners, other providers and equipment suppliers."

⁸ The Collaborative Home Improvement Agency: Foundations

The report argues that in the future:

- the core Care and Repair customer base will broaden as a result of population changes and as the public priorities for commissioning services change; and
- services will be targeted at either end of this broader spectrum, firstly to customers with high levels of need who require support to remain at home; and secondly to customers with low levels of need, who with the delivery of preventative solutions, can remain independent and well at home for longer period of time.

Collaborative Home Improvement Agency



Future vision for Care and Repair services...

The customer base will... broaden out because of changing demographics and commissioning priorities

Services will be targeted in two areas: Highly targeted services to high need individuals and low level preventative services to a larger population

It is argued that this presents an opportunity to become, “*provider of choice to engage in a meaningful discussion with ‘younger’ old people about their long term housing choices*”. There is also an opportunity to collaborate and innovate with others to develop non-traditional services for new customer groups which are a high priority for ‘local health and wellbeing boards’ with services being developed for those “*with mental health issues, loneliness, social exclusion, obesity and diabetes, chaotic lifestyles, drug abuse and the needs of troubled families.*”

The report comes to the following conclusions and recommendations which offer future direction on how the Care and Repair sector in Scotland should focus strategic planning on building its status as a key mechanism in shifting the balance of care from acute to preventive services which promote independence:

<p>From housing to health</p> <p>The future is one of greater collaboration and integration with related services, all concerned with promoting health, wellbeing and independence in the home</p>	<p>Changing services</p> <p>All providers must take account of the impact of demographic changes on the kind of services needed in their local areas of operation</p>	<p>Health priority</p> <p>Public health priorities at a local level will also dictate much in terms of future commissioning. Managers must engage with local health and wellbeing boards so that they understand these priorities</p>	<p>Prevention</p> <p>Emphasis on ensuring wellbeing for 'the many' and better targeted interventions for 'the few'. Services need to find ways to respond to the needs and aspirations of both groups and show the ability to construct a transition from crisis management to prevention</p>
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This is an important report for Care and Repair in Scotland, particularly given the resonance between its recommendations and the challenge to recognise the sector’s contribution in the Health & Social Care integration agenda. The sector should therefore consider the extent to which the CHIA agenda offers a blueprint for the future development services and partnerships.

10.3 Pilot activity and innovation

As well as developing core Care and Repair services, the sector in Scotland is active in defining and testing new solutions that could make a significant contribution to the health and housing outcomes of older and disabled people. To this end, a number of innovation pilots are currently underway to test the capacity of Care and Repair to offer a greater diversity of services in parallel with the core service offer, broadening the sectors role in delivering national Health & Wellbeing Outcomes.

Pilot activity also assists with proving the credibility of the sector to new funders and commissioners. Current pilot activity in Scotland is outlined in more detail below:

Care and Repair Scotland Ayrshire and Arran Digital Inclusion Pilot

Scotland’s older population represent a large and growing proportion of Scottish society and are important consumers of public services. Research shows that nearly half of Britain's over 50s do not have access to a computer at home, at work or elsewhere. With three-quarters of UK public services already on-line, older people, particularly older people from minority groups, are least likely to be using and engaging with new technology, and are in danger of becoming digitally excluded. The Scottish Government recognises that there is a need to encourage older people in Scotland to become more digitally engaged as an integral part of the wider strategic approach to Scotland's ageing population.

In 2016, Care and Repair Scotland were awarded funding of £120,000 by the Scottish Government’s ‘Digital Scotland’ programme to carry a two year pilot testing the potential of Care and Repair services to deliver digital inclusion support to older people who could benefit from being online.

The aims of the funding are to:

- use the Care and Repair network of clients to introduce the idea of how digital inclusion can help them in their daily lives;
- use the skills and experience of the home based, personalised approach to homeowners that has made Care and Repair so successful; and
- complete a project designed to identify, design and implement a pilot to assess the contribution digital technologies can make to maintaining people in their homes for longer. The aim is to identify and test solutions which reduce social isolation; improve communication with services (in particular Health) and provide support for people with dementia and their carers.

Since commencing the pilot in October 2016, following the appointment of a Project Officer, all existing clients of Care and Repair were introduced to the digital inclusion project by letter. Based on client interest, the project offers either group sessions which build confidence and basic IT skills, or on a one to one basis for those who are housebound or unable to participate in classroom based learning. The option of providing a home based, individual approach has been well received, whilst group sessions have been credited with reducing social isolation and improving connectivity to other community based services.

The initial phases of the project have focused on supporting older people to acquire basic digital skills and to engage with email and social media as the means of keeping in touch with friends and family. The next stage is focusing on access to online services including internet shopping, and patient access GP services. Arran is fast becoming the place where there is most demand for the service. The local college is supporting the project by providing a classroom for clients to meet and learn more advanced skills. The pilot has set up a Facebook page for those involved with the project, to encourage interaction and help individuals promote the service to their friends. The process of recruiting volunteers to help with the project is also well underway. Future stages of the project will focus on engaging people with dementia and their carer to access online applications that can help with memory and recognition including material that support music therapy and reminiscing.

The digital inclusion pilot is important from the perspective not only that it makes a significant contribution to enabling older people to live independently and well but that it recognises the capacity, skills and network that can be accessed by working in partnership with Care and Repair services to offer a broader range of services to older people.

It demonstrates the capacity of Care and Repair to encourage older people to engage with services that will be of benefit as they get older given the trust and reputation held by the sector.

Equity Release: Help for Homes Pilot Scheme

Care and Repair Scotland and the Energy Savings Trust are working in partnership to deliver a pilot equity loans scheme on behalf of the Scottish Government. The loan is designed to help owner occupiers carry out energy measures and repairs to future proof their home and enable them to live in comfort for as long as possible.

The Home Energy Efficiency Programmes for Scotland: Equity Loans scheme (HEEPS: Equity Loans) provides equity loans of up to £40,000 towards the capital cost of installing eligible energy efficiency measures and essential repairs for owner occupiers and smaller private sector landlords. The pilot project being delivered through Glasgow, Argyll & Bute and Perth & Kinross Care and Repair Schemes offers assistance through the process from application to completion of works for applicants who would benefit from support through the process.

The Care and Repair Service is responsible for identifying clients and where appropriate providing practical assistance to those who require support through the process of identifying repairs, getting quotes and checking completed work. Clients who wish to apply will be directed through Home Energy Scotland in order to receive further advice on energy saving and if appropriate be referred for an application form to apply for equity release funding. Work undertaken must have an element of energy efficiency work and external repairs can also be included. Specifically at least 45% of the cost of the work must be energy efficiency related, including works which reduce heat loss. External works which reduce damp and drafts such as fixing a leaky roof, repairing a damp wall or drafty windows would qualify. 55% or less of the works cost can be used to fund external repairs generally.

EST will liaise with Care and Repair, the client and appointed lawyers to ensure valuation surveys are completed and standard security paperwork has been approved and lodged in order to release funds. EST will manage the administration of the loan funds. The loans do not require monthly payments so provide a potential funding source for those on low incomes who are faced with large repair bills. Instead, the loan will be repaid when the property is sold. The amount repaid is related to how much was borrowed and how much the house has increased in value.

Historically, core funding of Care and Repair focussed on providing assistance to clients with major repairs, maintenance, and adaptations and with funding applications to facilitate such works. The move away from subsidising private sector repair and improvements has led to a significant drop in the level of grant awards for major repair with a renewed focus on adaptations and other priorities within a local Scheme of Assistance. Nevertheless, this activity remains an important part of the Care and Repair service offer, and as the population ages will be a significant aspect of the overall package of support to enable older people to live independently, particularly given the condition of the private sector housing stock in Scotland.

The importance of the Equity Release pilot should therefore not be underestimated. It provides a mechanism in the absence of credible funding options for older people who are capital rich but cash poor, to carry out essential property repairs which could otherwise result in the need to move home.

It also enables Care and Repair services to maintain the core repair, improvement and project management skills associated with major repair work that could otherwise be lost to the sector. This mechanism could enable all Care and Repair services to offer a truly holistic offer to older people which focuses not just on the suitability of the home environment not from an adaptations perspective but from a housing conditions and quality perspective too.



Practice example

Equity Loan: Glasgow Care and Repair

Glasgow Care and Repair offer the Equity Loan Scheme that the Scottish Government is currently piloting to enable owner occupiers and private landlords to improve the energy efficiency of their homes and carry out repairs to the fabric of the building. The loan is secured against the property however, there is no ongoing repayments and the loan will only be repaid when the property is sold or upon the death of the applicant.

Glasgow Care and Repair alongside Energy Saving Trust provide independent advice and assistance to help elderly and disabled homeowners live in the comfort and safety of their own community. It should be noted however, that the scheme is not solely designed for the elderly or disabled. The help that Glasgow Care and Repair offer through assistance to clients when preparing an application to the Energy Saving Trust, include:

- arranging tenders from approved contractors;
- contacting mortgage lenders and solicitors;
- assisting with the completion of the application form; and
- monitoring the progress of the works.

There have been many different referral routes into this service, this including self-referrals, family and/or friends, the Energy Saving Trust, Home Energy Scotland, Housing Associations and other agencies.

Glasgow Care and Repair note that home visits are an essential aspect of the service model, contributing to the delivery successful outcomes. Home visits provide an opportunity to explain the operation of the equity loan scheme in full detail, whilst enabling officers to gauge the scope of the likely work involved. Glasgow Care and Repair have built up trusting relationships with all interested parties, i.e. Home Energy Scotland, Energy Saving Trust, Solicitors, Mortgage Lenders and Contractors. This is seen as an important success factor in the development and testing of the pilot service.

Care and Repair Dementia Enablement Pilot Project – Life Changes Trust

The majority of older people live in their own homes and this is set to increase with people living longer and a focus on caring for people in the community. There has been significant research on new-build design for people living with dementia, however most people with dementia will not live in a purpose built property, but continue to live in their own homes.

People with dementia can stay independent for longer at home given the correct support for themselves and their carer. They are more likely to have falls or accidents in the home and therefore it is especially important to ensure that the home is safe and free from potential hazards at an early stage.

The Care and Repair Dementia Enablement Pilot involves a £1M investment in Care and Repair from the Life Changes Trust to:

- prioritise preventative and home safety work which makes sure people living with dementia are living in an independent but safe manner;
- provide enablement and adaptation work and to make the home more suited to the needs of people living with dementia; and
- act as a conduit to inform and develop existing and new services and equipment for people living with dementia that can then be adopted by others and incorporated into future dementia provision for individuals and which can influence needs assessments in the future.

The project is being delivered in Aberdeen, Angus and Lochaber and involves dementia trained, dedicated and skilled staff discussing, agreeing and delivering works with individuals (and carers) which will enhance life in the home. The project involves close working between existing services.

The Dementia Enablement Pilot is an important opportunity for the Care and Repair sector in Scotland as it enables the contribution of local services in meeting the needs of people with dementia to be proven; and showcases to Health and Social Care Partnerships, the impact of preventative investment in adapting the home environment of people with dementia to live independently and well.

Simple changes in lighting, layout and the colour and tone of furnishings (which are inexpensive to implement but substantial in their impact) can enable a person with dementia to live independently and well at home for as long as possible. The home based, person-centred delivery model of Care and Repair, places the sector in an ideal position to lead on this role and make a real contribution to the outcomes of the third national Dementia Strategy. Evidencing the impact of this pilot to health and social care commissioners could therefore be of huge importance to the sector both locally and nationally.



Practice example

Dementia Enablement Project: Angus Care and Repair

Angus Care and Repair are part of the three-year Dementia Enablement Service pilot which has been funded by the Life Changes Trust. The service provided is a home safety check with specific materials and equipment that can be fitted to suit individual needs and stages of dementia. All service users have an Enablement Officer who is trained to the dementia ambassador standard. This Officer functions as the client's main contact throughout the process to maintain consistency and familiarity. Examples of the types of equipment which are installed into homes through this service are:

- Day/night digital clocks;
- Weekly wipe clean planning board;
- Daylight bulbs;
- Night light;
- PIR lights (activated by motion sensors);
- Level self-coloured thresholds;
- Coloured hand rails;
- Message in a bottle;
- Thumb turn locks & bathroom privacy locks.

The majority of referrals Angus Care and Repair receive are from the post diagnostic dementia team; however, 20% of referrals come from social work department, NHS, and directly from the family or friends. Currently Angus Care and Repair receive funding for one Dementia Enablement Officer and one part time administrator, with £20,000 towards the cost of materials. Minor repairs or security issues are also addressed and carried out by the Enablement Officer. There is a charge for small repairs with the installation of these services by free of charge. After the work is completed the Enablement Officer will return three to six months later to see if anything else is needed.

Angus Care and Repair identify three factors which are essential for the success of a Dementia Enablement Service:

- An early dementia diagnosis with a swift referral into the service;
- The presence of a carer or relative during the initial assessment to ensure the client understands the possibilities the service can offer; and
- The availability of funding for clients that need support.

The major problem experienced by the service is that many customers who are referred are already significantly affected by the dementia and are unable to adjust to the equipment provided or able to work with it long before they go into care. This is a barrier to the success of the service, and Angus Care and Repair are working hard to overcome it in collaboration with health and social care colleagues.

10.4 Partnership and collaboration

In addition to core services, increasingly Care and Repair services are developing a range of service options to support older and disabled people to live independently and well. As outlined in Chapter 6, many of these services resonate well with the health and social care integration agenda and are likely to have been developed to take advantage of local funding opportunities or to address unmet local need for support. The evaluation of pilot activity outlined in Chapter 10, may also influence the diversity of the Care and Repair service offer at a local level.

Care and Repair services that currently do not offer such services but are interested in testing their feasibility are encouraged to liaise with other services to get an insight into how to set up and run specific projects; or to seek advice from Care and Repair Scotland.

Expanding from traditional core activities and accessing other opportunities can take Care and Repair services into new areas that demand collaboration with partner agencies. Care and Repair services should explore all options, both at a local and a national level, where funding opportunities exist and where expansion of activities can take place.

Therefore, it is imperative for Care and Repair services to be aware of the priorities set by their local authority within either the Local Housing Strategy or Housing Contribution Statement; as well as those set out in the Strategic Commissioning Plans of Integrated Joint Boards.

Care and Repair services should also remember that service users require to be consulted on changes to service delivery. Engagement with stakeholders ensures that Care and Repair services are well prepared to respond to the service demands that clients require. Stakeholder consultation can take place on a local basis or in a wider context and allows service delivery objectives to be aligned to community needs.

A significant aspect of the Scottish Government's Reshaping Care for Older People agenda focuses on the principle that greater collaborative working across public sector agencies can enable resources to be unlocked and shared and more holistic personalised solutions to be delivered. On this basis, Care and Repair services are likely to find themselves engaging in partnership working and collaboration with other service providers as strategies for shifting the balance of care become implemented and embedded at a locality level across the country.

Partnership can involve collaboration with other service providers and joint working with other agencies. Care and Repair services and other partners are increasingly working together to explore service delivery options that can be shared. Examples of this would be Care and Repair working with the Fire Service or the Police to deliver fire safety and home security advice and practical assistance; or Care and Repair services proactively working with NHS staff as part of Home from Hospital services.



Practice example

Collaboration and partnership: Care and Repair, NHS Highland and Highland Council

Five Care and Repair services have been successful in securing a pioneering partnership with NHS Highland and Highland Council, which not only provides longer term assurance over funding but recognises the key role that Care & Repair services provide in shifting the balance of care at a local level. Increasingly as Care and Repair funding arrangements offered only annual certainty in terms of delivery budgets, which made longer term business planning or service development increasingly challenging; all five Care and Repair services in the Highlands made a strategic decision to proactively engage with both the local authority and Health Board to promote and evidence the contribution of Care and Repair in achieving strategic integration objectives.

To enable this, five Care and Repair services (Cairn Care and Repair, ILM Care and Repair, Lochaber Care and Repair, Lochalsh & Skye Care and Repair, and Pentland Care and Repair) jointly commissioned a consultant to produce a paper outlining the range of services provided, evidencing how these services make a significant contribution to shifting the balance of care from hospital to the community.

Informed by this evidence, negotiations were successful in achieving a tri partnership agreement between each of the five Care and Repair services, NHS Highland and the Highland Council. The partnership agreement, the first of its kind in Scotland, covered a three year period from 2015-2018. The services delivered under the funding arrangements include;

- Handyperson (traditional services),
- small repairs,
- Technology Enabled Care (primarily Telecare),
- operation of the Community Equipment Service (in 3 of the 5 areas); and
- fitting minor adaptations.

As well as adding to the menu of services previously offered, the three year financial agreement has provided stability in terms of business planning and financial accounting. It has also been successful in providing continuity of service delivery for the client, the NHS and Council staff. Equally importantly, the partnership arrangement has proved successful in enhancing the relationships between Care & Repair services and health professionals.

Highland Care and Repair partners, would offer the following advice on how to collaborate effectively with health and social care partners to seek new funding and service delivery opportunities:

1. Provide clear evidence to funders that the local Care and Repair service is indispensable to them and is integral to the continued delivery of their existing service provision;
2. Look for gaps in existing services, demonstrate how you can make efficiencies, adopt a “can do” approach and work hard to establish relationships with the people who are able to influence and effect change;
3. Be innovative and proactive in seeking out new opportunities. Read your funders’ strategies so you can demonstrate that you understand their objectives and how your service can help them to achieve their goals.

10.5 Future directions for Care and Repair: Key messages

Major demographic change and the substantial growth of the older population in Scotland will create both challenges and opportunities for the Care and Repair sector in Scotland.

As the public policy agenda develops in Scotland to meet the needs of this population, Care and Repair services must proactively ensure that the contribution they make in enabling older people to live independently and well in their own homes for as long as possible, is promoted and recognised by strategic planners, funders and commissioners. Maximising this contribution will therefore increasingly rely on service development and diversification to meet local need and commissioning priorities. To achieve this, Care and Repair services must develop, innovate, test ideas and share practice; as well as developing partnerships which enable a collaborative approach to meeting the needs of older and disabled people.

Key messages are as follows:

- To ensure that Care and Repair organisations maintain their place at the forefront of service provision to older and disabled people, it is **important that Care and Repair services in Scotland explore options around diversification;**
- **If Care and Repair organisations can become involved in delivering a broader range of services**, then rather than services being diluted, Care and Repair **will remain at the frontline of service delivery** to older and disabled clients over a diverse range of activities;
- **The vision of a ‘Collaborative Home Improvement Agency’ model for the Care and Repair sector emphasises that local teams cannot remain separate but should instead actively seek out partner agencies and services which can open up new markets** without demanding dramatic changes to their main activities, areas of expertise or staff competencies. Within this model, the Care and Repair sector in Scotland should focus strategic planning on building its status as a key partner in shifting the balance of care from acute to preventive services which promote independence at home;
- **Pilot activity is hugely important to the Care and Repair sector in Scotland** not only because it creates new service development and funding opportunity; but because it provides the opportunity to recognise and promote the reputation, capacity, skills and network of the sector as a delivery partner;
- **Care and Repair services should explore all options, both at a local and a national level, where funding opportunities exist and where expansion of activities can take place;** and
- **Therefore, it is imperative for Care and Repair services to be aware of the priorities set** by their local authority within either the Local Housing Strategy or Housing Contribution Statement; as well as those set out in the Strategic Commissioning Plans of Integrated Joint Boards.

11 Equality and Diversity Issues

The principles of diversity and equality, along with flexibility, choice, privacy and trust, reflect the ethos of Care and Repair services in Scotland. The purpose of this Chapter 11 is to outline the current legal context for equalities in Scotland and to set out how this framework acts as a guide for Care and Repair services in supporting diversity and enabling equality.

Chapter 11, considers the importance of addressing diversity and equality issues with employees, service users and stakeholders. This chapter outlines the legislative background and describes the nine equality stands outlined within the law. Ultimately, Care and Repair services should not just protect individuals from unfair treatment but should also be positively promoting equality.

11.1 Equality and diversity: definition and core principles

Diversity relates to the differences between people. Care and Repair services manage diversity by acknowledging and respecting such differences in the workplace and addressing differences when delivering services and interacting with other stakeholders. Therefore, if possible, it is beneficial for Care and Repair to draw on a broad range of talent to fully represent the customer and inform decision making and policy development⁹.

Equality relates both to equality of treatment: treating everyone in the same way; and equality of outcome: acting in a way that impacts equally on different groups. Equality is the framework which enables individuals and groups to participate and contribute to communities and society in an inclusive and fair way within the context of equal opportunity and open access.

There are nine elements or strands to equality and diversity: disability, gender, race, age, sexual orientation, transgender, religion or belief, marriage or civil partnership and pregnancy and maternity.

All these elements require to be addressed by Care and Repair services both in terms of complying with the law on equality and by taking a proactive and positive approach to equality and diversity to ensure community cohesion and good relations between groups of people and between individuals.

In Scotland, equal opportunities are defined in schedule 5 of the Scotland Act 1998¹⁰. Equal opportunities are interpreted in the Act as the prevention, elimination or regulation of discrimination between persons on the grounds of sex or marital status, racial grounds, on grounds of disability, age, sexual orientation, language or social origin, or other social attributes, including beliefs or opinions such as religious beliefs or political opinions. The specific statutory obligations of Care and Repair services with regard to equality and diversity are detailed below.

⁹Equality and Human Rights Commission. Available: <https://www.equalityhumanrights.com/en/public-sector-equality-duty-scotland/background-equality-duty>, [Accessed:24th November 2017]

¹⁰ <http://www.legislation.gov.uk/ukpga/1998/46/schedule/5>

11.2 Legislative background to equality and diversity

The Equality Act 2010 came into force on 5 April 2011 and was introduced to simplify the law relating to equalities by combining the large range of legislation into one Act. The main major pieces of legislation that merged include the Disability Discrimination Act 1995, the Race Relations Act 1976, the Sex Discrimination Act 1975, and the Equal Pay Act 1970. This has allowed equality law to be modernised and for there to be one central piece of legislation that simplifies the law on discrimination. As well as harmonising equality law, the Equality Act 2010 extends legal provisions in regard to diversity and equality, not only by protecting individuals from unfair treatment but by also placing an obligation on public authorities to positively promote equality¹¹.

The impact of the Equality Act 2010 on Care and Repair services can be characterised by the following key themes:

- A new equality duty is placed on public bodies in respect to the nine equalities strands;
- Equality rights for older persons are strengthened; and
- Better protection for disabled persons is included in the legislation.

Although they are not public bodies (although local authorities have this status), Care and Repair services must ensure that their staff and management committees/advisory boards are aware of relevant legislation on equalities. Furthermore, service users and other stakeholders must be made aware of the organisation's commitment to equal opportunities.

The extension of provisions in the Act regarding positive action means that Care and Repair organisations must take positive measures to ensure that people from the nine equalities groups are fairly represented in relation to employment and have fair access to services. Care and Repair organisations must actively promote services to the main equalities groups and may wish to undertake impact assessments to establish the extent to which their equalities initiatives are effective.

From April 2011 all protected characteristics will be subject to the public body equality duty which requires organisations not to discriminate, to promote equality of opportunity, and to foster good relations by tackling prejudice.

The Equalities and Human Rights Commission has regulatory functions in respect to ensuring that organisations comply with the law as it relates to equalities.

11.3 Equalities in practice

Beyond the statutory requirement that Care and Repair organisations have to comply with the law on equalities, it is important for Care and Repair staff to embrace equality and diversity issues to ensure that the right services are delivered to meet the needs of all clients including those with protected characteristics. A positive approach to equality and diversity allows Care and Repair organisations to contribute towards enhancing the quality of life in communities by promoting understanding and tolerance. Embracing a proactive approach to equalities in employment allows Care and Repair organisations to attract and employ the best possible staff members.

¹¹ Equality and Human Rights Commission. Available: <https://www.equalityhumanrights.com/en/public-sector-equality-duty-scotland/background-equality-duty>, [Accessed:24th November 2017]

Compliance with the general equality duty is not just a legal obligation but makes good business sense for Care and Repair services: providing a service which meets the needs of its users ensures that the core business activities are carried out more effectively.

All Care and Repair organisations must promote equality and diversity across the nine elements or strands to equality and diversity – disability, gender, race, age, sexual orientation, transgender, and religion or belief, pregnancy and maternity and marriage and civil partnership. In order to do this, Care and Repair services should give consideration to carrying out the following actions:

- **Ensure that the Care and Repair services' policies and procedures embrace statutory requirements associated with equality and diversity and best practice, particularly in relation employment and recruitment;**
- **Develop links with partner agencies to support engagement with equalities matters e.g. participating in translation schemes;**
- **Have effective monitoring systems in place to evaluate the organisation's performance in respect to equality and diversity issues; and**
- **Initiate a training programme for staff in respect to raising awareness on equality and diversity issues associated with disability, gender, race, age, sexual orientation, transgender, and religion or belief.**

When considering training aimed at raising staff awareness of equality and diversity issues, there may be some equality strands that require more attention than others. While it is a generalisation, Care and Repair staff may have experience of issues surrounding age discrimination and disability but possibly have less experience of the issues associated with transgender or religion or belief.

A training needs assessment should be carried to establish what the training needs of the staff team are, and trainers should be selected that have specialist knowledge in particular areas of equality and diversity.

11.4 Other resources

Equality and diversity are at the heart of the basic principles of human rights. The European Convention's statement on Human Rights can be found at the following link: http://www.echr.coe.int/NR/rdonlyres/D5CC24A7-DC13-4318-B457-5C9014916D7A/0/ENG_CONV.pdf

The Chartered Institute of Housing have produced a briefing on equalities and diversity which has an informative glossary on equality terminology. Although focused on the housing sector, there are examples of innovative practice within the briefing. The briefing can be accessed at the following link: <http://www.cih.org/practice/briefs/documents/EqualityDiversityPracticeBrief.pdf>

The Equalities and Human Rights Commission Scotland promotes equality and human rights, works to eliminate discrimination and to reduce inequalities, and protects human rights. Their website contains a range of resources and can be accessed at the following link: <http://www.equalityhumanrights.com/scotland/>

11.5 Key Messages: Equality and Diversity

Care and Repair Services have a responsibility and a duty to actively promote diversity and equality by acknowledging and respecting the differences between people in the workplace, service users and stakeholders. The key messages of this chapter are as follows:

- **Care and Repair Services have a responsibility to address diversity issues:** Projects should acknowledge and respect the differences between people in the workplace and address diversity issues when delivering services and interacting with stakeholders;
- **Care and Repair Services have a responsibility to ensure there is equal opportunities:** Projects should be promoting an equality framework to ensure that everyone is treated in the same way to provide a service that is focused on equal opportunities and open access;
- **Care and Repair Services should ensure that there is no discrimination towards the nine protected characteristics outlined in the Equality Act 2010:** The nine protected characteristics include: age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, and sexual orientation;
- **The 2010 Equality Act has had 3 main implications for Care and Repair Services:** The Equality Act has: placed a duty on protecting the nine characteristics, has strengthened equality rights for older people and has provided better protection for those living with a disability;
- **Care and Repair Services benefit from having a positive approach to equality and diversity:** Having a positive approach to equality and diversity will contribute towards enhancing the quality of life in communities by promoting understanding and tolerance. It also makes good business sense as by providing a service which meets the needs of its users, Care and Repair services ensure that core business activities are carried out more effectively;
- **Care and Repair Services should consider four actions to effectively promote diversity and equality, including:**
 - ensuring policies and procedures embrace statutory requirements associated with equality, diversity and good practice;
 - developing links with partner agencies i.e. participating in translation schemes;
 - implementing effective monitoring systems to evaluate performance on equality and diversity; and
 - initiating training programmes for staff to raise awareness of equality and diversity.

12 Good Practice Guide Conclusions

The 2018 Care and Repair Scotland Good Practice Guide highlights and promotes the significant contribution of the Care and Repair sector to enabling older and disabled people in Scotland to live independently and well in their own homes for as long as is possible. In doing this, Care and Repair services also make a substantial contribution to the Scottish Government's National Health & Wellbeing Outcomes and are important delivery partners in the Strategic Commissioning Plans (of Health & Social Care Partnerships) and the Housing Contribution Statements (of local authorities).

Whilst the sector makes a major contribution to enabling independence at home; it is acknowledged that Care and Repair has the potential to make a greater contribution in the future. To achieve this, services may need to look beyond the existing funding mechanisms, partnerships and service models that have been the bedrock of the sectors development and growth over the last 30 years.

Within the next 20 years, the demographic environment will be one where more than 1 in 3 of Scotland's population will be aged 60 or over. As the public policy agenda develops in Scotland to meet the needs of this population, Care and Repair services must proactively ensure that the contribution they make in enabling older people to live independently and well at home; is promoted and recognised by strategic planners, funders and commissioners.

Maximising this contribution will therefore increasingly rely on service development and diversification to meet local need and commissioning priorities. To achieve this, Care and Repair services must develop innovate, test ideas and share practice; as well as developing partnerships which enable a collaborative approach to meeting the needs of older and disabled people.

To support and enable this process, Care and Repair Scotland will continue to provide a national platform to lead, promote and support local Care and Repair services to:

- share and exchange good practice at Regional Meetings and Care and Repair Scotland events;
- strengthen understanding of the key benefits of Care and Repair at a national and local level;
- provide an accreditation and a performance framework to demonstrate value and efficiency to service planners, funders and commissioners; and
- support local teams to engage effectively with health and social care agencies and other stakeholders in the coproduction of local services, encouraging the testing of new and innovative approaches to supporting older and disabled people to live independently and well at home.

For advice and support on specific service delivery, business management, procurement, partnership and funding issues; or to access information on the latest good practice or innovation material available, please contact Care and Repair Scotland at:

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