



Independent Living Strategy

2024-29

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1. Introduction and operating context

The One Vision Housing (OVH) Independent Living Strategy 2024-29 sets out the medium term aims and objectives for the service and provides operational context.

The Strategy is subject to an annual refresh and is closely aligned with other Strategic Documents including the OVH Strategic Plan, OVH Development Strategy and the OVH Asset Management Strategy.

This iteration of the Strategy has been informed by a comprehensive consultation exercise of existing OVH Independent Living customers, with positive feedback received and no suggestions for changes to service or the aims and objective outlined in Section 3 below.

Underpinning the high level aims and objectives outlined in this document is a detailed Service Delivery Plan that is monitored through the Performance Management System, is subject to regular progress reporting to the Executive Management Team / Board and is also subject to an annual refresh.

The Independent living service continues to be a key cornerstone of the OVH housing offer and demand for the service remains strong in all areas.

As wider local support services have been subject to budgetary restraints and have become harder to access, we have noticed an upsurge in the numbers of customers that rely on our service to maintain tenancies and live independent lives.

This is not without its challenges as increasingly we are dealing with customers who have multiple and complex needs.

To ensure we are well equipped to meet these needs we have had to adapt our delivery, making improvements to our networking, referral / signposting services and providing specialist training for our excellent staff in areas such as 'trauma informed practice' and 'understanding mental health conditions'.

In our role as the organisational lead for safeguarding across OVH, we have also witnessed a steady increase in the number of safeguarding referrals both in general needs and independent living properties.

Over the course of this Strategy we will be keeping our resources that are available for managing safeguarding issues and alerts under review to ensure we continue to do all that we can to prevent vulnerable customers from harm.

Our service continues to evolve in other ways in response to our operational context and again over the course of this Strategy we will look to build on the successful launch of a domestic abuse refuge in 2023, in partnership with Sefton Women's and Children's Aid (SWACA), by exploring options for further specialist housing provision to meet identified needs in our communities.

Work in this area ties in neatly with our drive to be a significant influence in local strategic partnerships e.g. assisting local authorities in our areas of operation to achieve the aims of the Supported Housing (Regulation) Act 2023 and Domestic Abuse Act 2021.

As with all areas of our business, as we look forward to continuing to provide first rate services ensuring our customers are front and centre of everything we do, will be of paramount importance.

We welcome the stronger focus, that stems from the revised Consumer Regulations and the ways these will be monitored by the Regulator of Social Housing (effective from April 2024), on ensuring customers are treated with respect, they have opportunities to influence our service delivery and we are fully accountable to them.

We also welcome the Housing Ombudsman's Spotlight Reports including the 'Relationship of Equals Report' and over the course of this strategy will be developing actions to implement the recommendations.

With this in mind we will continue to undertake detailed customer journey mapping exercises and will also look to facilitate means of bringing our customer base together to drive continuous improvement and collaborative working.

Since the last iteration of this Strategy are key achievements over the period 2023/24 include:

- Completed digital transformation of lifeline services in our Retirement Housing Schemes
- Implemented changes to service delivery from 'Customer Journey Mapping' exercise into furnished tenancy provision
- Completed 'Customer Journey Mapping' exercise of Aids and Adaptations services and developed action for implementation of customer recommendations
- Provided comprehensive training package for all OVH frontline staff and repairs operatives on 'Safeguarding', 'Domestic Abuse' and 'Professional Curiosity'
- Improved automation of processes and use of digital platforms to create efficiencies and enhanced customer experience

2. Where are we now?

2.1 The Independent Living Service

The Independent Living service is comprised of 668 dispersed properties across OVH's area of operations and is provided to individuals and families who require assistance to maintain and sustain tenancies.

The service also includes seven purpose-built Retirement Living Schemes (312 units) providing a service to people over the age of 55 in safe and secure settings (see **Table 1**) below.

Following a review of best practice from the sector, we have implemented a revised means of assessing customer suitability for the service via a ‘needs and risk assessment’ which focuses on the following key areas:

- Housing Related Support and Advice
- Being Safe and Secure
- Budgeting and Benefits
- Health and Wellbeing
- Repairs and Adaptations

A team of 17 specially trained Independent Living Officers provide an intensive housing management service offering a minimum of fortnightly visits to customers in their homes, helping them to achieve goals set out in a personalised Housing Action Plan (some customers may receive more frequent visits depending on risk-assessed needs).

The service is supported by a management team who oversee the whole provision offered by the Independent Living service and play a key role in strategic partnerships at the local level to promote the interests of vulnerable customer groups.

Table 1

| OVH Retirement Living Schemes | | |
|--------------------------------------|---|--------------|
| Scheme Name | Location | Units |
| Bishops Court | Bishops Court West Derby, Liverpool L12 5LE | 36 |
| Brookes Court | Whetstone Lane, Birkenhead CH 41 2ZE | 44 |
| Fernley Grange | Fleetwood Road, Southport PR9 9FY | 30 |
| Kenyon’s Lodge | Aragon Close, Lydiate L31 9PZ | 41 |
| Mill Spring Court | Park Street, Bootle L20 3SE | 52 |
| Orrell Lodge | Rafter Avenue, Bootle L20 6PR | 61 |
| St John’s Court | St Johns Road, Waterloo L22 9RH | 48 |

Each individual property across the whole Independent Living service has a 24-hour lifeline service to access support in case of emergency.

To enable tenancy sustainment, there are also 44 furnished tenancies where furniture packages are provided (via service charges eligible for Housing Benefit) according to levels of identified need, managed by a Furnished Tenancy Officer in the Independent Living Team.

The Independent Living Team also work alongside Neighbourhood Services to manage a Home Starter fund where essential household items such as white goods are provided free of charge to customers who otherwise would not be able to sustain their tenancy.

Working in partnership with specialist providers the Independent Living Service contribute to the demand for specialist housing services via 'agency managed' arrangements.

OVH currently has 71 units in management where external agencies provide intensive support for customers with a range of specialist needs e.g. enduring mental health conditions.

The Independent Living Team also manage the aids and adaptations service across the whole of OVH's social and affordable housing rented stock.

With an annual budget of circa £1.5m allocated for new major / minor adaptations and renewals of existing adaptations (applicable to stock transfer stock in Sefton), the service plays a vital role in helping vulnerable customers to maintain independent lives and stay safe within their own homes.

We also work closely with other local authority partners outside the Sefton area to help facilitate this service and make best use of shared knowledge and financial resources.

Demand for the aids and adaptations service is consistently high and OVH are required to triage requests to ensure the provision is targeted at those most in need.

The Team also provides operational support to enable OVH to meet its safeguarding adults and children responsibilities via dedicated officer and deputy roles, appropriate referral mechanisms, comprehensive training for front line staff, sound policy and procedures and close partnership work with multi-agencies / Safeguarding Boards.

2.2 Performance

The Independent Living service consistently achieves:

- Top quartile performance (and ranked first amongst Northwest Benchmarking Group) in the Survey of Tenants and Residents (STAR)
- Cumulative satisfaction (when viewed over a 12-month period) above 95% across indicators in transactional surveys with customers held monthly – (see **Table 2** below)
- All targets set in the internal performance management scorecard reporting

Table 2

| Customer Satisfaction Survey | 2018/19 | 2019/20 | 2020/21 | 2021/22 | 2022/23 | 2023/24 |
|---|----------------|----------------|----------------|----------------|----------------|----------------|
| Independent Living Survey - Overall satisfaction with the service | 98.8% | 98.3% | 100% | 93.8% | 95.5% | 94.5% |
| Independent Living Survey - Satisfaction with service provided by IL Officer | 98.8% | 98.7% | 98.9% | 95.0% | 95.1% | 94.5% |
| Independent Living Survey - Does the service help you to live independently | 97.0% | 96.5% | 100% | 89.0% | 93.7% | 93.1% |
| Independent Living Survey - Satisfaction with the safety and security of your home | 96.4% | 97.4% | 98.9% | 95.1% | 95.5% | 92.6% |
| Aids & Adaptations - Overall satisfaction with the service | 98.7% | 97.1% | 100% | 95.6% | 97.8% | 97.5% |

Although our performance across all indicators is slightly down on the previous year, this is still within top-quartile parameters and is symptomatic of a general reduction in customer satisfaction across the housing sector as a whole and wider service industries.

Over 2024, we will be working with customer groups to assess areas we need to improve and are optimistic the performance will show upward trend.

2.3 Strategic Context

Although the Independent Living service provides housing support for vulnerable people of all ages, the customer base is predominately people who are over 55.

The current and predicted demographic trend in OVH's prime areas of operation indicates this cohort of the population is above the national average and is set to dramatically increase over coming years (65+ age group set increase 17.4% by 2027 in Liverpool borough and 36% in the Sefton area by 2041 – [Office of National Statistics, Population Projections](#)).

This weight of numbers in the 55+ age group has led to an up-turn in demand for the Independent Living service and is coupled with increased referral for the service from existing OVH customers (96 referrals in 2023/24).

Our success in sustaining tenancies increases pressure on demand for services as the turnover rates are low (the main reasons for tenancy termination within the service are due to residents passing away or their care needs cannot continue to be met within the accommodation setting).

Recent cuts to local authority budgets and commissioning of services for special needs groups may also have led to an increase in demand for specialist housing services for customers with complex and intensive housing support needs.

OVH contributes to meeting the demand for specialist housing services by working in partnership with a number of external providers via 'agency managed' arrangements.

Over the course of this Strategy, OVH will continue to seek suitable opportunities to expand its service offer into this area and other forms of housing provision that address health inequalities and wellbeing through its development programme.

2.4 Risk Identification and Mitigation Factors

A Government decision to keep supported housing funding entirely within the welfare benefits system coupled with a favourable rent settlement in place until 2026, brings some much-needed stability to the service and has been welcomed by OVH and the sector in general.

This involved a decision to retain funding for supported housing through Housing Benefit (administered by Local Authorities) rather than through Universal Credit (administered by the Department for Work and Pensions).

Whilst it is considered that Local Authorities have a better understanding of needs in their communities and are largely supportive of providers such as OVH, this funding model is not without its risks.

The costs of delivering an independent living service are typically higher than those for general needs housing. Illustrative examples of why costs are higher include:

- The additional staff time required to provide personalised intensive housing support to enable customers to maintain independence within their homes
- The provision of, maintenance, lifecycle replacement and upgrading costs of specialist equipment e.g. lifeline services offering 24-hour assistance to customers in their homes
- The higher and more frequent replacement costs of fixtures and fittings within purpose built 'Retirement Living Schemes' in communal areas
- Provision of ancillary services such as communal cleaning and grounds maintenance

Local Authorities are then able to recoup the additional welfare expenditure needed for higher rents and service charges from central budgets provided they can evidence the services and costs claimed by providers, such as OVH, are matched in reality and that they are fair and proportionate.

If local authorities fail to provide this evidence they may be subject to 'clawback' arrangements from central government and for this reason the provision of funding is never guaranteed at the local level and therefore constitutes a risk to OVH.

It also means OVH cannot simply expand numbers on service or introduce service enhancements without first reaching agreement with local authorities in its areas of operation.

These risks may increase as local authorities are put under a greater spotlight to ensure standards of supported housing (mostly relevant to 'exempt' forms of service offer) are maintained through greater scrutiny / inspection via the Supported Housing Regulation Act 2023.

OVH mitigates against this risk (protecting current funding levels) and providing a good evidence base for any expansion plans through the following:

- OVH is able to provide full and accurate accounting information for service charge costs and intensive housing support services delivered
- OVH is a key contributor to local strategic forums and can demonstrate the case for independent living services creating cost savings to local authorities in the areas of primary and social care

A further potential risk associated with service charges is the impact it has on customers who are self-funders.

Additional services or costs that are recovered through service charges add to the total amount payable by customers who do not claim welfare benefits leading to a potential situation where the service offer could become unaffordable for them.

OVH mitigates against potential affordability issues by assessing all costs and service improvements before they are passed onto customers to ensure they are reasonable and proportionate, via an affordability assessment as part of the annual rent setting process.

All OVH Retirement Housing schemes will be subject to ongoing viability checks (in line with OVH's sustainability index -which assesses net present value of properties factoring in revenue creation determined by occupancy levels and future demand, against investment costs).

3. Where do we want to be? (Aims)

Put simply, our primary goal is always to provide exemplary services to our customers to enable them to live independent and fulfilling lives.

We know from the testimony and feedback that we receive from our customers and the high demand for our services that every day, in no small way, we achieve this goal.

To ensure we continue to deliver this primary goal and in recognition of our key role as a service provider of significant strategic importance, over the course of this strategy, we will deliver on the following high-level aims (linked to aims outlined in the wider OVH Strategic Plan 2024-29):

3.1 OVH Strategic Plan 2024-29 Aim - To provide the environment to deliver business success

3.1.1 Meet all legal and regulatory requirements

Our aim is always to demonstrate full compliance with all relevant legal and regulatory requirements including all aspects of health and safety, buildings safety and the Regulatory Framework for Social Housing.

With close links to OVH's wider asset management function and revised Consumer Standards requirements our current systems and planned improvements for data capture / analysis and automated processes for checking / auditing and resource planning, linked to tight budgetary controls will ensure we continue to:

- Provide safe homes that meet all prevailing property standards and deploy systems that take into consideration the needs of vulnerable customer groups (this includes all requirements set out in the Fire Safety Act 2021, Fire Safety (England) Regulations 2022 and the Building Safety Act 2022)
- Provide full compliance assurance to customers, the OVH Board, the Social Housing Regulator, commissioning bodies, partner organisations and external enforcement agencies
- Minimise or eliminate the risk of legal challenge and protect reputation

3.1.2 Contribute to key strategic partnerships

Over the course of this strategy we will look to build on the existing strong links that we have established at the local, regional and national levels for operational and strategic service delivery, planning and transformation.

This will include:

- Contribution into local operational partnerships in the areas of safeguarding, community safety and health and wellbeing agendas by involvement in multi-agency forums e.g. Sefton Adult Safeguarding Board (and sub-groups), Sefton Children's Safeguarding Board, MAPPA, MARAC, Sefton Domestic Abuse Partnership, Sefton Children and Young People's Partnership Board
- Establishing a partnership and communication channel for Registered Providers and Sefton Adult Safeguarding Board – with OVH acting as lead representative
- Membership of the national Housing Learning Improvement Network (LIN) and focus groups on supported housing issues run by the National Housing Federation (NHF)
- Sefton Tech Strategy Group
- Member of Integrated Care Board - Sefton

3.1.3 Achieve long term growth aspirations

The challenges and potential restraints on OVH achieving growth in terms of increased numbers on service and diversification of the range of services provided are outlined above in section 2.4.

OVH is, however, keen to pursue growth opportunities for the Independent Living service and will over the course of this strategy continue to look for suitable development types and partnership opportunities to develop Extra Care services within its area of operations.

We will also continue to work closely with Local Authority partnerships and third sector service providers with the aim of increasing provision of specialist supported accommodation.

3.2 OVH Strategic Plan 2024-29 Aim - To provide excellent services that meet or exceed customer and stakeholder expectations

3.2.1 Be a key player in delivery of the local 'housing and health' agenda

Over the course of this strategy we will build on our current involvement and influence with statutory bodies e.g. the Integrated Care Team / Board, looking to lead a transformation in the use of primary care resources by helping people to stay safe and well in their homes, minimising the need for clinical intervention.

Our overall aim is to develop a co-ordinated approach to tackling the keys issues of:

- **The Prevention agenda** - helping people to stay safe and well in their homes with minimal clinical intervention (warm, affordable homes mean people have more disposable income for healthier lifestyles and are less likely to become ill, also takes into account adaptations, assistive technologies and trips and slips prevention)
- **Social isolation** and the means to prevent it (providing the means for social interaction e.g. access to internet facilities)

The above themes all contribute to our customers leading healthy and fulfilling lives but also ensure tenancy sustainment and prevent turnover to residential care, protecting OVH rental income and in meeting revised Consumer Standards requirements.

3.2.2 Provide a modern and future proofed service

To ensure the wider independent living service is competitive and makes the most of modern technologies, OVH will continue to invest in improvements to the appearance and functionality of its digital service.

This will include refurbishments incorporating our award-winning dementia friendly principles and feasibility studies / scoping exercises for implementation of assistive technologies / telecare services and retendering for the lifeline provision in our dispersed service in 2024.

Our Independent Living properties will also be included in wider OVH schemes to improve energy efficiency, (as part of delivery of the Sovini Group Carbon Reduction and Environmental Management Strategy) the requirements of the Social Housing Regulation Act 2023 and any revisions to the Decent Homes Standard.

Over the course of this strategy the Independent Living service will play a key role in wider OVH objectives of developing a better understanding and analysis of customer data to drive service improvement and ensure individual needs are met.

3.2.3 Maintain excellent performance and achieve high customer satisfaction

Having achieved top quartile performance for customer satisfaction across a range of indicators in the STAR survey within a national benchmarking group (made up of 189 comparable organisations), OVH intends to maintain or improve on this performance over the course of this strategy.

Working closely with the Customer Experience Team, the Independent Living Team will analyse intelligence gathered through customer journey mapping, transactional surveys, complaints, continued market comparison through benchmarking and attendance at best practice groups to identify opportunities for continuous improvement.

Through excellent performance in the delivery of independent living services OVH will be able to:

- Retain existing customer loyalty and maintain healthy future demand through quality service offer
- Assure funding providers (local authorities) that the service offer meets expectations for continuation of existing arrangements and to provide evidence base for expansion
- Demonstrate track record of delivery for partnership working initiatives
- Meet Consumer Standards requirements

3.2.4 Identify and meet specialist housing needs

Through the 'needs and risk assessment' process OVH often identify individuals who would not be suitable for the independent living service due to their high level or specialist support needs.

When attempting to signpost and make referral for these individuals and through attendance at strategic forums where local housing supply is monitored, OVH is able to identify gaps in local service provision to meet specialist housing needs.

Where possible, OVH looks to address these gaps in provision by working in partnership with other service providers usually on an ‘agency managed’ arrangement and will explore possibilities of developing new partnerships over the course of this strategy.

4. How are we going to get there? (Objectives)

To achieve the aims over the course of this strategy, OVH will deliver a series of objectives and set specific actions within the Service Delivery Plan (which will be refreshed on an annual basis).

The objectives set out below will be cross-cutting and may contribute to one or more of the strategic aims set out in Section 3.

Table 3

| Objective | Actions and Outcomes |
|--|---|
| Development and Continuous Improvement of Independent Living digital systems | <ul style="list-style-type: none"> • Develop a Safeguarding Portal and reporting system • Development of the Aids and Adaptations Dashboard to improve budgetary control • Continued review of Independent Living Paperwork and digitalisation of forms • Work collaboratively with the central IT Team on the implementation of the new integrated housing management system with enhanced functionality for the Independent Living Service • Over the period of 2024-29 and following a procurement exercise we will look to improve the Lifeline provision in the dispersed service |
| Replacement / lifecycle of component parts in the Retirement Housing Schemes | <ul style="list-style-type: none"> • Over the course of this strategy a replacement programme will be agreed taking into account best practice and recommendations from leading sector advisors / practitioners e.g. Housing our Ageing Population Panel for Innovation (HAPPI) • Life cycle replacements and all future scheme investment works will be in line with OVH sustainability index, legislative drivers such as Building Safety Act / Future Homes Standard (when approved) |

| | |
|--|---|
| | and will be in accord with the Sovini Group Carbon Reduction and Environmental Management Strategy |
| Staff engagement, development and growth | <ul style="list-style-type: none"> • Ensure that we provide an environment that offers each member of the team the ability to grow and develop both professionally and personally, by offering - <ul style="list-style-type: none"> ○ Training ○ Coaching ○ Access to good advice ○ Access to management support • Ensure that all members of the team understand their role in contributing to the organisations aims and objectives and Code of Conduct requirements • Ensure that all members of the team understand how they contribute to OVH complying with regulatory requirements |
| Customers and service development - Aids and Adaptations | <ul style="list-style-type: none"> • Review findings of the Aids and Adaptations Customer Journey Mapping exercise and develop a customer focus working group to respond to improvement comments made in the mapping exercise • Ensure effective budget management and VFM within this service |
| Customer and service development – Furniture Package Service | <ul style="list-style-type: none"> • Subject to budget allocation, increase the number of furniture Packages we can provide • Review and extend our offer of support / household items we can provide under the Home Starter initiative • Along with colleagues from Neighbourhood Services look develop a network of agencies who can support customers who are experiencing financial hardship and furniture poverty |
| Customer and service development – Safeguarding and Domestic Abuse | <ul style="list-style-type: none"> • Review the need for a specialist Officer to sit within the Independent Living Team to support our work in the areas of safeguarding and domestic abuse • Join the Domestic Abuse Housing Alliance and work towards accreditation in this area • Continue to be involved in strategic and operational forums |

| | |
|--|--|
| <p>Customer and service development – Independent Living Service</p> | <ul style="list-style-type: none"> • Continue to deliver exemplary performance and customer satisfaction • With customers develop a ‘Welcome To The Independent Living Service Information Pack’ • Use our customer satisfaction information to drive service improvement • Further strengthen our links with Health, with a particular focus on links to the Integrated Health Team and Complex Lives Service • Further develop our offer to customers who need advice in terms of employment, health (both mental and physical), drug and alcohol needs, education and social isolation – linking to work with colleagues in Neighbourhood Services (Identifying and responding to the needs of Vulnerable Customers) • Ensure that the service continues to meet customers’ needs and evolves to ensure that it is fit for the future |
| <p>All service areas – continue to have a strategic presence and influence</p> | <ul style="list-style-type: none"> • Through increased participation in local, regional and national strategic forums OVH will seek to influence direction of travel of policy initiatives and be best placed to access any funding opportunities that may arise |

5. How are we going to measure it?

The high level aims and objectives outlined in this strategy will guide a detailed Service Delivery Plan which ensures actions are assigned, appropriately resourced and monitored for progress, with intervention measures where any targets have not been met.

The OVH Executive Management Team and OVH Board will receive regular updates on Service Delivery Plan progress as well as Key Performance Indicator reporting and collated information from transactional customer surveys and complaints monitoring.

OVH also provide periodic, detailed performance reports to the customer representative Service Review Group on all aspects of service delivery, including independent living.

The results of the Survey of Tenants and Residents (STAR) and the Tenant Satisfaction Measures will be benchmarked against peer providers and will drive improvement plans to be incorporated into future revisions of this strategy for any identified dip in performance.

Over the course of this strategy, OVH will comply with any national performance monitoring and reporting requirements that may be required as a result of implementation of the New Regulatory framework for social housing or the Supported Housing Regulation Act.

OVH will also request progress reporting of how its contributions have made a difference to the aims and objectives of wider strategic plans through its involvement with partner and statutory bodies.