Dataspring

The pilot RSR 2005

Monitoring sheltered and supported housing

Summary report

Dawn Marshall, Fiona Lyall Grant and Christine Whitehead

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Executive summary

Objectives of the research

- The objective of the research was to develop a set of questions for the Regulatory and Statistical Return (RSR) to reflect housing associations' holdings of stock designed or modified to meet the needs of specific groups of households. Changes apply to categories formally entitled 'sheltered' and 'supported housing'.

- The research concentrated on changes in terminology for use in the RSR and the subsequent impact on the re-categorisation of stock. It also highlighted administrative problems this may create.

- A fundamental reason behind the change is the need for a clearer focus in the RSR on dwelling based features. This relates to policy changes arising from Supporting People and required the updating of both terminology and definitions within the RSR.

Terminology

- The term 'retirement housing' originally suggested by the Housing Corporation as a replacement to sheltered housing was viewed by HAs taking part in this research as market driven and not an appropriate term for the social sector.

- The term 'sheltered housing' is no longer to be used in the RSR from 2005. It is replaced by 'housing for older people (all special design features)','housing for older people (some special design features)' and 'designated supported housing for older people'.

- The terminology for 'supported housing' categories has been changed from 'unregistered supported housing' and 'care homes providing personal care' to 'purpose designed supported housing' and 'designated supported housing'.

- Floating support will not be included in the RSR as a separate category, there is no longer any way of ensuring that the information available captures the full scale of activity.

- The term 'leasehold schemes for the elderly' (LSE) will also be replaced by 'leasehold schemes for older people' (LSOP) in the RSR 2005.

- In order to complement the new approach to supported housing and housing for older people, the Guidance Notes to the RSR will also include a revised description of general needs housing.

Impact on re-categorisation

- Pilot results indicated that there would be a reduction of 16-18% of units formerly returned as sheltered housing and a similar proportionate reduction in units formerly returned as supported housing.

Administration issues

- Most housing associations are able to re-categorise their stock so that their data are consistent with the new terminology. Some would have to re-visit their information held on specific issues such as supported housing target rents.

Pilot RSR summary report

1 INTRODUCTION

The Cambridge Centre for Housing and Planning Research has been working with the Housing Corporation since 1998 to ensure that the data returned in the Regulatory and Statistical Return (RSR) are as accurate and as meaningful as possible whilst keeping the burden of the RSR proportionate. The key to this has been to consult HAs at every stage about their operational realities and to develop the RSR with the sector.

The current changes relate to Parts A, C, F, G, H, Ib and O associated with sheltered and supported housing. Recent changes in policy notably with respect to Supporting People bring with them the need to update the RSR in line with regulatory and monitoring requirements. This involved changing definitions, descriptions and terminology.

The objective of the research was to pilot new definitions with respect to both sheltered and supported housing and to ensure that the RSR more clearly represents the physical stock owned and managed by HAs. The research collected data via a pilot RSR and qualitative surveys to test the definitions and to measure the impact of change.

In 1995, the Housing Corporation made a commitment to produce better definitions of sheltered housing for HAs. It has pursued this commitment in collaboration with researchers at the Centre for Urban and Regional Studies (CURS) at Birmingham University. CURS developed a set of descriptions of both sheltered and supported housing that formed the basis for changes proposed for the RSR 2005 and reflected the Corporation's new focus on facilities and design features. It also provides information that potential tenants require to make informed choices about their housing. In the case of supported housing, the description additionally included designation criteria.

2 CHANGES PILOTED FOR THE RSR 2005

The objective of the research was to pilot the definitions, descriptions and terminology as developed by CURS. With respect to sheltered housing, there was little scope to make significant modifications for the purposes of the RSR because the Housing Corporation had already adopted an agreed three-tiered approach for policy purposes. With respect to supported housing, the descriptions provided by CURS were open to the possibility of more substantial change if required, because Housing Corporation policy had not been finalised at the time of the study.

The overall net impact on the RSR dataset of the new definitions was expected to be an increase in the number of general needs units and a reduction in units described as retirement or supported housing. This is because under the new definitions some stock previously reported under these categories would be re-categorised to general needs stock.

3 OUTCOMES OF THE RESEARCH

3.1. Changes to sheltered housing definitions

Going out of use in 2005

- The Housing Corporation will no longer use sheltered housing as a term or definition. Equally, the terms - Categories 1, 1.5, 2 and 2.5. will no longer be used.

- The terms 'general needs sheltered housing' and 'supported sheltered housing' that were used in the RSR between 2002 and 2004 will not be used in the 2005 and later RSRs.

Piloting the term ‘retirement housing’

The aim of piloting these descriptions was not to consult on them in the conventional sense but rather to ensure that they could be operationalised and to measure the impact of the change in approach.

The term ‘retirement housing’ had been proposed because it reflects the way in which the private sector relates to housing for older people and so provided a cross sector view at the front line. However, it raised considerable concern among HAs who viewed the term as inextricably linked to private sector, leased housing provision only.

The Housing Corporation agreed that the term, 'retirement housing' remained open to change as disagreement about its appropriateness in the context of rented housing emerged in all scoping discussions.

Findings

The Pilot survey showed that while the terminology was unacceptable the description was reasonably clear and could be operationalised by HAs. As a result of the Pilot the terminology was changed to 'housing for older people'. However as age is not a pre-requisite to access this housing a circular exemplifying the application of the RSR descriptions is required to ensure accurate reporting. The Housing Corporation's new data requirement is to identify properties that are primarily intended for older people and have a range of basic facilities over and above general needs accommodation. In addition, these properties may have some or all of an identified list of design features that are incorporated with the purpose of enabling people to live there for the rest of their lifetimes. Access to support must be available but not necessarily in place.

The Housing Corporation acknowledges that HAs are providing a wider range of specialist stock. However, the Corporation only needs to know about that subset of stock containing specified special design features to a minimum standard.

Impact

Analysis of data provided by HAs indicates a potential decrease of 17-18% in the number of units recorded in RSR data in 2005 as compared to 2004. As a result, housing for older people will appear less important in the overall profile of HA housing.

3.2. Changes to supported housing definitions

Going out of use in 2005

The existing definition of supported housing was introduced in 1999 and reflected the Housing Corporation's definition of support as set out in the now obsolete Circular R1-11/99. This defined supported housing by services, rather than the physical attributes of properties. The definition was based on a three-pronged test:

1. The RSL must have a landlord/ tenant relationship with the individual receiving support.
2. The level of housing support provided must be over and above that which would generally be provided by an RSL managing general needs housing.
3. The RSL must have formally taken on responsibilities for providing the housing-related support to the resident(s) concerned, either directly or indirectly, through a formal relationship with another organisation or voluntary body.

Only if all three conditions applied was housing deemed to be supported; all other housing was viewed as general needs. In addition, all housing in receipt of additional SHG or SHMG was categorised as supported housing (not all supported housing was eligible for this additional funding).

Findings

The description of supported housing included in the Pilot RSR incorporated a number of changes as compared to the initial description of supported housing provided by CURS.

In line with the Housing Corporation's need to view stock differently, it was proposed that the Housing Corporation would no longer use the term supported housing on its own from 2005. Instead the Housing Corporation would introduce two new terms that more closely reflected the new focus on monitoring buildings and the use of buildings within the HA stock.

The pilot RSR used the terms ‘purpose designated’ and ‘purpose designed’ supported housing. However these terms were considered by HAs that took part in this research as too similar and needed to be more clearly distinguished. This could be achieved by changing the terminology to 'designated' and 'purpose designed' supported housing in the 2005 RSR.

Analysis of the Pilot RSR highlighted the fact that stock designated for older people with support in place (as opposed to access to support) had been included incorrectly as designated supported housing in the Pilot RSR. This suggested that an additional category of housing for older people should be included - Designated supported housing for older people.

The most significant point of clarification was to ensure that when stock is broken down by activity type up-front in the RSR, the two categories - of housing for older people and supported housing - are mutually exclusive.

Impact

Analysis of data returned in the Pilot RSR indicated that the new approach would result in a potential net decrease of 16-18% in owned supported housing units between 2004 and 2005. Around half of this loss resulted from the re-categorisation of units receiving floating support to general needs housing.

3.3. Other issues

Floating support

Floating support will no longer be identified as a separate category in the RSR 2005. The pilot showed there is no way of ensuring that the data on floating support can truly reflect the full scale of this activity. The scale of floating support services provided by HAs can however be identified in Supporting People data collected in the Supporting People Client Reference Form, managed by the Joint Centre for Social Housing Research on behalf of the ODPM. These data can also be obtained from the National Housing Federation

Rents

The change in definition has implications for target rents data and leasehold schemes for the elderly - now to be designated leasehold housing for older people.

The re-categorisation of stock under the new approach results in changes in average rent levels and service charges. These changes were not significant in the majority of cases. However, in any comparative analysis of rent levels between 2004 and 2005

RSR data, the results will need to be checked against details of relevant stock in order to ensure that the findings are meaningful.

The majority of HAs could provide detailed information about supported housing rents from existing information systems - by property type and size and by local authority area. As these data are already available in the majority of cases, the findings indicate that the burden of providing this additional information is minimal for the majority of HAs.

On the other hand, the findings indicate that providing supported housing target rents data is likely to be less straightforward for many HAs. It is therefore important that the Housing Corporation reviews the value of these data. Equally, clearer guidance should be provided to ensure data needs are transparent with respect to target rents especially with respect to the data.

Leasehold

In line with the Housing Corporation's adoption of 'housing for older people' as the new terminology to replace sheltered housing, leasehold schemes for the elderly will be known as 'leasehold housing for older people' from 2005. Feedback from HAs indicated that a range of areas of the guidance notes would require clarification in order to ensure accurate and consistent reporting in the RSR 2005.

4 CONCLUSIONS

This RSR research project differed from those that went before it. The aim was not to develop new definitions of sheltered and supported housing in collaboration with HAs but, instead, to apply definitions that had already been developed and to test how these worked in the context of the RSR and its resulting dataset. There was only one aspect of the new approach open to consultation in the traditional sense of the term - HAs were asked if the term 'retirement housing' was the correct term to replace sheltered housing and if not, what the best alternative term would be.

HAs still thought the terminology was unclear. Changes were agreed to ‘housing for older people’, to ‘purpose designed’ and ‘designated’ supported housing. To ensure categories were mutually exclusive the category designated supported housing for older people was introduced within housing for older people.

The term 'retirement housing' as a replacement for sheltered housing remained unpopular throughout the research although no agreed alternative term was forthcoming. In particular, the term was viewed as market driven and not appropriate to the social sector. 'housing for an ageing population' has been adopted more widely by the international research community but proved difficult to apply to the RSR's narrow view of this housing in terms of the subset approach to data collection. The result is that the Housing Corporation opted to adopt 'housing for older people' as the new terminology to reflect its wider policy.

Pilot results indicated that there would be a reduction of 16-18% of units formerly returned as sheltered housing and a similar proportionate reduction in units formerly returned as supported housing.

5 RECOMMENDATIONS FOR THE RSR 2005

Recommendation one: From sheltered housing to 'housing for older people'

'Housing for older people' should replace the term sheltered housing in the RSR 2005. It will refer to a subset of the full range of housing options primarily provided for older people by HAs which have the relevant physical attributes (the remainder will be designated as either general needs or leasehold housing in the RSR).

Recommendation two: Descriptions of 'housing for older people'
Rental stocks should be reported in one of three separate categories of 'housing for older people' or as general needs based on the agreed descriptions. The categories for housing for older people are: Housing for older people (some special design features); Housing for older people (all special design features); and Designated supported housing for older people.

Recommendation three: Categories of supported housing
Two new categories of supported housing should replace those used in the RSR prior to 2005, using the terminology:

- Designated supported housing
- Purpose designed supported housing

Designated supported housing: Includes buildings with no or some special design facilities and features but which provide accommodation for a specific client group with support services provided by you or another organisation.

Purpose designed supported housing: Includes buildings that are specially designed or remodelled to encourage independent living or the adjustment to independence for client groups that require specific design features. There must be support services provided by you or another organisation. At a minimum a building or scheme must have the following:

- Facilities: The scheme or main building must have basic facilities of a laundry for residents or washing machines in living units provided by the landlord. The scheme must also have a communal lounge for people to meet in.
- Design features: The entrance area to the building, communal areas and some living units must be designed to wheelchair user standards.

In the case of schemes or buildings that have some units or part of the building that is covered by this definition, you should only record the actual number of units owned or managed that are covered.

Recommendation four: Descriptions of supported housing
The final recommended text of the revised descriptions for use in the glossary of the RSR 2005 is set out in the main report.

Recommendation five: Information about floating support
From 2005 the RSR should no longer request information about 'floating support', as there is no way of ensuring that these data truly reflect the full scale of this activity and there is an appropriate alternative data source.

Recommendation six: Information about supported housing rents and service charges
In order to make it possible to evaluate social housing rents as a whole we recommend that the Housing Corporation should collect more extensive information about supported housing rents from 2005, including rents and service charges by property type and size at national and local authority level and including target rents. This recommendation is made subject to evidence of proportionality.

Recommendation seven: Contextualisation
There are misconceptions surrounding the change in approach to data collection relating to housing for older people and these are likely to result in inaccurate reporting by HAs. It is important that the agreed changes are accurately contextualised via guidance and/or good practice documents.

Recommendation eight: New description of general needs housing

In order to complement the new approach to supported housing and housing for older people, the Guidance Notes to the RSR should also include a revised description of general needs housing.

Recommendation nine: New terminology for leasehold schemes for the elderly

The Housing Corporation wishes to reflect the fact that leasehold schemes for the elderly (LSE) represent one of the wide range of housing options available to older people under its 'housing for older people' policy. The new term, leasehold housing for older people (LHOP) will replace LSE in the RSR 2005.

Recommendation ten: Clarification of the RSR 2005 guidance notes

Guidance notes relating to the following aspects of the RSR require further clarification in the RSR 2005 on:

- How to distinguish between non-self-contained units (shared housing bedspaces) and self- contained units, particularly bedsits, and how these should be recorded in relation to property type and size.

- Target rents, particularly supported housing target rents including exemptions, start dates and valuation methods.

- The distinction between an assured and a secure tenancy.

- FTE Staff by Employment function including how the new disaggregated staff functions relate to front-line roles and past categories.

- The exclusion of Supporting People charges from 'housing benefit ineligible service charges' in the breakdown of general needs and supported housing rents from 2005 onwards.

- In addition a revised definition of Care Homes replaces the term supported housing in the glossary of the RSR 2005.

Recommendation eleven: Pre-population of the electronic RSR

The Housing Corporation should ensure that the RSR contractor implements a default zero in fields if left blank so that HAs are not forced to enter zeros where the field is not relevant to them.

The main research report can be found on the Dataspring website at www.dataspring.org

Dataspring

Dataspring is based within the Cambridge Centre for Housing and Planning Research, University of Cambridge. Its database provides economic and socio-economic information at district, county, regional and national level for those working in housing; the Housing Corporation, housing associations, local authorities, academic researchers and consultants. The Dataspring team of researchers use data from the Housing Corporation, the Census and other sources to build and maintain a local housing markets database, interactive rent guides, and to analyse the regulatory returns of housing associations. Every year it produces a *Guide to Local Rents* and the *Profile of the Housing Association Sector* on behalf of the Housing Corporation. These are made freely available on the Dataspring website, together with discussion papers, briefing papers and sector studies which provide more in-depth analysis of the social housing sector.

Cambridge Centre for Housing and Planning Research

The Cambridge Centre for Housing and Planning Research is a leading research centre in the Department of Land Economy established in April 1990 with the objective of engaging in research into the economic, planning and legal frameworks of property and property development, particularly in the United Kingdom and Western Europe.

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Contact

Dataspring
Department of Land Economy
University of Cambridge
19 Silver Street
Cambridge
CB3 9EP

Tel: 01223 337118
Fax: 01223 330863
E-mail: landecon-dataspring@lists.cam.ac.uk

UNIVERSITY OF CAMBRIDGE