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SHELTERED HOUSING - A SERVICE FOR THE ELDERLY

Susan Clayton

Durham University
February 1978

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SHELTERED HOUSING - A SERVICE FOR THE ELDERLY

Susan Clayton

A B S T R A C T

The research looks at the provision of sheltered housing for the elderly by local authorities in County Durham in 1976. Durham has high provision of such housing, around 14% of the population aged sixty-five and over live in such dwellings.

The aims of sheltered housing are given, followed by a description of the accommodation, wardens, alarm systems and, to a limited extent, tenants. Some of the problems and successes of sheltered housing are discussed and detailed costings of the major types of dwelling are provided to illustrate the discussion.

Alternative forms of care for the elderly are then considered and costings given for these for elderly people requiring varying levels of domiliary support and having different levels of income.

The research looks at the provision of sheltered housing by housing associations, almshouses and charities in County Durham and discusses the alleged advantages of provision by such bodies.

The thesis concludes with a consideration of the future of sheltered housing and looks at some of the factors which might be taken into account when policies for housing the elderly are being formulated.

domiliary

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Chapter 1I N T R O D U C T I O N

The concept of sheltered housing is simple. It aims to provide good housing and "good neighbourly care" for elderly people in order that they can remain in the community for as long as possible. The three main features of such housing are:

1. unfurnished accommodation especially built or adapted for use by elderly people,
2. the provision of a warden to deal with certain aspects of the tenants' welfare, and
3. an emergency alarm system.

In many schemes communal facilities such as a common room and laundry are provided and around thirty dwellings are normally grouped together. The tenants can live their lives as they please and have the same rights as any other local council tenant. Local authority and health services such as home helps, meals on wheels, visits from general practitioners and district nurses are provided under the same arrangements as for people living in independent housing*.

The research for this thesis was carried out in County Durham where there is high provision of sheltered housing, some fourteen percent of the population aged sixty-five and over live in such accommodation. There are nearly 9000 sheltered housing dwellings in the area, catering for around 11,600 elderly people. The service has grown very rapidly for the first local authority scheme in the county did not open until 1968.

*This term is used to describe housing where there is no warden coverage.

Despite the number of sheltered housing dwellings in existence, the service has attracted little attention in the health and welfare field. Many reports do not mention the service at all, for example, *Priorities for Health and Personal Social Services in England (1976)*, although it laid much stress on community care for elderly people. One reason for this absence is that sheltered housing, although a welfare service, comes under the Department of the Environment, rather than the Department of Health and Social Security. It is administered by District Housing Departments rather than County Social Services Departments, who administer most other community services to the elderly.

The aim of sheltered housing seems to vary greatly according to the philosophy of the person being consulted and there is no general consensus of opinion as to whom should be given places or any recommended level of provision. However, it is very difficult to lay down guidelines, because the service tends to change according to the proportion of elderly people in a district in such accommodation, for this influences the type of person given tenancies and the demands that they make upon wardens. These demands are also related to the provision of other services to the elderly such as meals on wheels, home helps, old people's hostels and geriatric hospital beds. In Durham the provision of all these services is high and this reduces the pressure on wardens considerably and allows them time for non-essential activities such as organizing many social activities.

Most research in the past was carried out in areas of low provision where tenancies were mainly given to elderly people in great need, for example, those who were physically frail, very lonely or living in poor housing conditions prior to moving into sheltered housing.

No national figures on sheltered housing provision are available, which, perhaps reflects the lack of interest in the subject, but it is believed that County Durham has a very high provision compared with most counties.

The number of sheltered housing dwellings in County Durham was obtained by the researcher, but it was not possible to find the exact number of elderly people housed, because only records of the number of dwellings were held by the District Councils. Although the number of dwellings suitable for two people was sometimes available, this is not a useful guide to the number of tenants, as the majority of two person dwellings are occupied by one person.

In order to obtain information about the number of tenants each of the thirty wardens visited by the researcher was asked the number of dwellings occupied by two or more people. On average twenty per cent of the dwellings were occupied by two people.

An attempt was also made to check addresses in the electoral registers, but only one District, Sedgfield, had a list which was readily available, from which tenants in sheltered housing could be identified. Sixteen hundred and fifty-one, out of a possible two thousand four hundred and fifty six, in this district were traced in the November 1975 electoral register and Table 1 gives details of the occupants.

Table 1Occupants of Sheltered Housing Dwellings in Sedgfield District

<u>Occupants</u>	<u>Dwellings</u>	<u>%</u>
Single men	196	11.9
Single women	763	45.6
Two people	632	38.3
Three people	66	4.0
Four people	<u>4</u>	<u>0.2</u>
	<u>1651</u>	<u>100.0</u>

It should however be noted that Sedgfield had a very high provision of sheltered housing per 1000 population . sixty-five and over and it is likely that there were more "young" people in schemes, and hence a higher proportion of couples, than might be found in areas where provision is low.

Since one method suggests twenty per cent of dwellings are occupied by couples and the other thirty-eight per cent it was decided to assume three out of every ten dwellings are occupied by two elderly people when estimating the number of people in sheltered housing in Durham County.

Table 2 shows the number of sheltered housing dwellings owned by local authorities and other agencies* in each district and an estimate of the proportion of elderly people living in such housing.

* Details of dwellings owned by other bodies are given in Chapter 7.

Table 2

Provision of Sheltered Housing in County Durham as at March 1976
Local Authority and Autonomous Agencies

<u>District</u>	<u>No. Dwellings</u>	<u>Estimated No. Persons</u>	<u>Total Population Aged 65 and over</u>	<u>% of Population Estimated in Sheltered Housing</u>
Derwent	683	888	14,285	6.2
Chester-le-Street	569	740	6,033	12.2
Wear Valley	1,176	1,529	10,175	15.0
Durham	1,279	1,663	10,566	15.7
Easington	2,142	2,785	14,323	19.4
Teesdale	64	83	4,301	1.9
Sedgefield	2,556	3,323	11,352	29.3
Darlington	<u>480</u>	<u>624</u>	<u>14,055</u>	<u>4.4</u>
Total	<u>8,949</u>	<u>11,635</u>	<u>85,090</u>	<u>13.7</u>

Based on an estimate of 3 dwellings in every ten being occupied by two persons, the rest being occupied by one person, see page 4.

From the table it will be seen that provision ranged from 1.9% in Teesdale to 29.3% in Sedgefield, the average provision being 13.7%. Contrary to what might be expected, Teesdale has no plans to build any more schemes, whereas Sedgefield has plans for further developments. In Teesdale, there was one scheme in each of the two towns with a population of over 3000 people and it was felt the community in each of the smaller villages provided adequate support for elderly people. Sedgefield, however, aimed to make every local authority dwelling for elderly people sheltered housing and to continue building such accommodation until there are enough places for all elderly people in the district. Several other districts also aim to provide one hundred per cent warden cover for their elderly person's dwellings.

Table 3 shows the proportion of its housing that each District Council has made into sheltered housing. The tables show the proportions relate fairly well to the percentage of the elderly population in sheltered housing, as shown in the previous table.

Table 3
Local Authority Owned only
Sheltered Housing as a Percentage of All Local Authority Housing 1976

	<u>Sheltered Housing Dwellings</u>	<u>All Housing * April 1976</u>	<u>% which is Sheltered Housing</u>
Derwent	629	13,806	4.6
Chester-le-Street	563	8,145	6.9
Wear Valley	1,052	8,347	12.6
Durham	1,226	12,825	9.6
Easington	1,966	14,501	13.6
Teesdale	30	1,243	2.4
Sedgefield	2,406	11,784	20.4
Darlington	<u>323</u>	<u>7,883</u>	<u>4.1</u>
Total	<u>8,195</u>	<u>78,534</u>	<u>10.4</u>

* Source: Housing Statistics (England and Wales) Part I, February 1977
(Chartered Institute of Public Finance and Accountancy .).

The fact that nearly fourteen per cent of elderly people in Durham live in sheltered housing is surprising when it is remembered how new the concept of such housing is.

The first local authority to provide sheltered housing, Sturminster Newton, did not open its first scheme until 1948. However, even then it was very different from most modern schemes, because, it is understood from Horsley (1971), that the tenants shared bathrooms, lavatories and kitchens and the warden did not live on the site.

A few more schemes were built in the early fifties but there was no clearly defined purpose for sheltered housing "some authorities specifically excluded infirm people from consideration, others accepted only the infirm". (Townsend 1962.) In 1956 the Ministry of Housing and Local Government commissioned an inquiry as to whether "having regard to the needs of other sections of the population, old people were receiving a reasonable share of the accommodation provided and whether it was of a kind which was best suited to their physical needs and financial circumstances". (Circular 32/56.) As a result of the findings of the inquiry, the provision of accommodation for elderly people was encouraged and the conditions regarding subsidies and improvements grants relaxed. (Circulars 18/57 and 55/57.)

Most of the accommodation for elderly people built at that time consisted of independent bungalows but the provision of some sheltered housing was encouraged by those circulars and by a Ministry of Housing and Local Government design bulletin "Flatlets for Old People" which encouraged the development of sheltered housing and introduced the concept of warden accommodation, communal sitting room and an alarm to the warden's accommodation. Further encouragement was given by a joint circular (Ministry of Housing and Local Government 10/61 and Ministry of Health 12/61) which outlined the range of services which wardens might provide for tenants and stressed the need for co-operation between housing, health and welfare authorities and voluntary bodies.

As a result of interest in the design of the blocks of sheltered housing dwellings the Ministry of Housing and Local Government built a special scheme at Stevenage (in conjunction with the ^{New Town} Development Corporation) which incorporated many of the ideas received from earlier inquiries.

Technical information about the design and construction of the scheme were given in a Design Bulletin "Old People's Flatlets at Stevenage". (1966)

This was followed by another report "Grouped Flatlets for Old People" (1968) which gave the findings of a sociological study of tenants in the first six blocks of sheltered housing ever built by local authorities in England. The bulletin is still of value but the recommendations are partly misleading for the very first sheltered housing schemes tended to take fairly frail tenants whereas, with the big increase in provision, many younger, healthier people are now being accommodated.

Further encouragements for good design for all elderly people's dwellings were provided in 1969 when a circular (82/69) laid down some mandatory requirements for designing elderly people's accommodation, for example lavatory doors had to open outwards and have special locks which could be opened from the outside. There was also a long checklist of points which architects should consider when designing dwellings; for example, "is the (window) sill just low enough for an old person to see out when sitting in an easy chair". The circular also introduced the concept of "Category I" and "Category II" sheltered housing. It suggested that "Category I" bungalows "are best suited to couples who are able to maintain a greater degree of independence, who can manage rather more housework and who may want a small garden". "Category II" flatlets were considered most suitable for "less active old people, often living alone, who need smaller and labour-saving accommodation". In practice this distinction between tenants may not work out in the long term because the active elderly eventually become "less active".

Nationally, flats are the most common form of sheltered housing. Attenburrow (1976) found flats in blocks accounted for around eighty per cent of all schemes first tenanted in 1974 although in Durham bungalows are the most common form of dwelling.

During the nineteen sixties there were a number of other circulars relating to sheltered housing and considerable interest was shown in architectural and housing journals. Interest then appeared to wane, except for a Department of the Environment enquiry into the size of schemes (1975). ^{In the sixties and seventies} Despite the rapid expansion of the service, it would appear that many members of the public and policy makers are not aware of the service and the part it can play in supporting elderly people. An example of this neglect is that no official statistics have been collected on the provision of sheltered housing since 1965, when it was found there were sixty-three thousand, five hundred and forty-one dwellings in England and Wales (Health and Welfare 1966). The most recent estimate based on a large sample appears to be that of Perritt (1969). She suggests there were around one hundred and eighteen thousand dwellings in 1968. In 1976, the Department of the Environment commissioned a study to find the current level of provision (Housing of Old People: A Consultative Paper, 1976). The results are not yet available.

In Durham, the oldest sheltered housing scheme is the Sir E.D. Walker Almshouses which were opened in 1919. The scheme then comprised thirty-five bungalows, each of which had an emergency bell linked to a warden's flat. No similar schemes followed until the first local authority scheme opened in 1968. The Wear Valley District Council had a small plot of land on which they intended to build some elderly people's dwellings and their housing consultants (who had built some sheltered housing in North Yorkshire) asked if they were interested in providing sheltered housing. The District Councillors visited the North Yorkshire schemes, were impressed with what they saw, and requested a scheme to be built in their District. Another early scheme was built in Durham City, when a good site was available for elderly people's dwellings and the local Medical Officer of Health encouraged the council to build sheltered housing. His idea was accepted, especially as the Ministry of Transport was providing a good grant towards the cost of new dwellings for persons displaced by a new motorway through part of Durham. Other Districts saw the early schemes and gradually they built their own.

These reasons are similar to those found by Sumner and Smith in their study of twenty-four local health and welfare authorities (1969).

"Factors which influenced housing authorities to embark on their first sheltered housing scheme included contact with other housing authorities, encouragement by county councils and central government departments, and chance conversations between officials who met to discuss other matters. The first scheme was usually thought of as an experiment with what seemed to be 'a good idea' and the decision to give it a trial was not related to estimates of the extent of need for the service."

Methodology

The fieldwork for this research was carried out in County Durham, during the period April 1975 to March 1976. The costings are all as at March 1976.

Visits were made to the housing departments of the eight District Councils in County Durham and all the other agencies providing more than ten sheltered housing dwellings in that county. Thirty-two schemes were visited and discussions held with wardens, reliefs and over a hundred tenants. Visits were also made to places where some form of alternatives to sheltered housing was being provided. Discussions were held with a number of people associated with, or interested in, this form of housing. These included charities such as Age Concern and Help the Aged, the Department of the Environment in London and Newcastle, and a number of elderly people who did not live in sheltered housing.

Chapter 2THE AIMS OF SHELTERED HOUSING

The role of sheltered housing is ambiguous, and the advantages claimed for it vary according to its intended purpose. Emphasis on qualities also varies according to who is being consulted, for example, whether it is an elderly person who applies for a place, a frail tenant who lives in a scheme or whether it is a District Council deciding if it should build a new scheme. It is hard to classify the advantages but to some extent they can be described as :-

1. facilities for the maintenance of a pleasant and independent life style,
2. preventative care,
3. temporary assistance in times of need, and
4. alternative to residence in an old person's hostel.

Facilities for the maintenance of a pleasant and independent life style

A major concept of sheltered housing is that elderly people are provided with an environment which encourages maximum opportunities in order to maintain independence and a choice of life style. It is appreciated that environmental influences intrude on the elderly to a greater extent than they do on other members of the community.

The provision of a well designed dwelling in a good location makes the life of all elderly people more easy than if they were to live in unsuitable accommodation, perhaps with many stairs, in a poor state of repair or lacking an inside toilet and bath.

Central heating allows warmth to be easily provided in all rooms, and the communal laundry, where provided, facilitates washing. Although dwellings are small, there is often a guest room so that relatives can come to visit tenants or nurse them when they are sick. Attempts are made to place all schemes in a convenient place so that tenants have easy access to shops and community activities.

One of the greatest advantages of sheltered housing is that tenants have independence, they have their own furniture and decorations, and can run their lives as they wish. The responsibility of running a home, budgeting and organizing meals, encourages self-respect and the knowledge that they are still in charge of their own lives.

In addition to a pleasant environment most people need to have social contact with other people. Where physical frailty or disability prevents tenants from visiting old friends or clubs, there are many opportunities for social interaction within the scheme. The warden and relief warden frequently visit for a friendly chat; the proximity of other elderly people provides opportunities for new friendships to develop and social activities are organized within the scheme which provide recreation and intellectual stimulation.

Some wardens visited by the researcher commented that the social interaction often encouraged tenants entering a scheme to take on a new lease of life. It may be, that while in their old home, they had difficulties and, relative to their younger neighbours, felt that they were more elderly whereas on entering schemes many of the problems were alleviated and in comparison with other tenants, they were the "youngsters".

The example of active life set by some of the tenants in their late seventies and eighties gave encouragement to the "youngsters" to reconsider their own life style.

Preventative Care

In contrast with the hostels which provide care for the frail, sheltered housing is mainly a preventative service, in that it aims to provide the support which prevents unnecessary deterioration in the health of the elderly.

The well-designed, centrally heated, accommodation reduces health problems aggravated by poor housing conditions and the advice of wardens may help tenants overcome personal problems and encourages them to seek medical advice and domiciliary services when these can be most efficiently provided. The friendship of the warden and social activities helps to reduce the loneliness and provides the mental stimulation which, it is believed, helps to delay the deterioration of the mind.

Many of the tenants in sheltered housing need no special physical help from the warden but move into schemes in order to gain the mental security offered by the availability of the warden and the provision of an alarm system. They know that, if they were to have an accident, someone will be available. This is a very great comfort to many tenants, especially those with conditions which are subject to sudden deterioration. In addition to support when physically ill, tenants appreciate the knowledge that the warden can be called if they fear burglars or vandals, feel depressed or have no-one to turn to for advice.

Many wardens commented on the way the existence of this service enabled tenants to go to bed happily at night and they felt that the alleviation of fear played a major part in keeping tenants from mental deterioration.

Support and oversight by the warden can obviate or reduce the need for other services. For example, doctors, health visitors and social workers may not need to call as frequently and hypothermia and ^{malnutrition} malnutrition may be prevented if the warden notices early symptoms and encourages action to alleviate the cause. No research has been carried out to quantify the savings, if any, which accrue to society as a result of the preventative care provided by sheltered housing, but the service is very popular with elderly people and appears to satisfy many of their needs and desires.

Temporary Assistance in Times of Need

A major aim of sheltered housing is the provision of services for elderly people who only occasionally need help. Although relatives and friends give much support to elderly people, including those in independent and sheltered housing, there are some people who have no-one to call upon for assistance or whose relatives are working or living at some distance and are unable to provide sufficient support.

The warden gives practical help to tenants who are ill or unable to perform their normal activities (for example, unable to go out shopping in snowy weather). She may collect prescriptions, run errands or give a little basic nursing care, although in some cases, all that is required is for her to contact relatives to let them know that their help is required.

If more serious situations arise, the warden may call in appropriate services such as doctors, district nurses, or request meals on wheels or home helps. If the tenants have to go to hospital, the warden may stay with the tenant until the ambulance arrives and will then make any necessary arrangements such as cancelling milk, informing relatives and locking up after everyone has left.

Alternative to Residence in an Old Person's Hostel

Sheltered housing is often considered as an alternative to hostels for elderly people who cannot cope entirely alone but require only a little care and support. It is likely that, if sheltered housing did not exist a number of tenants would have needed a place in a hostel.

Much of the limited literature on sheltered housing stresses the way in which it is an alternative to old person's hostels for some tenants, and several research projects involved the counting of the number of residents in hostels, who could be moved to sheltered housing. This type of research was important when sheltered housing first started in the fifties and early sixties, because it showed how some people were wrongly placed in hostels as suitable accommodation or a minimum level of supervision was not available. The availability of sheltered housing as an alternative to hostels may be reflected in the fact that the average age of hostel tenants has risen since then and only the very frail are now offered places.

However, no research is known to the author where matched pairs of elderly people were randomly allocated to sheltered housing and independent housing over a period of time and then followed up to see if sheltered housing prevented or delayed deterioration or the need for hostel care. Whilst support from a warden and access to an alarm system may help ^{to} maintain good physical and mental health, there is also the possibility that wardens may be more quick than relatives to encourage tenants to move into hostels.

Townsend (1962) envisaged sheltered housing almost completely taking over from residential care as a way of caring for elderly people. However, sheltered housing cannot manage with many frail people needing much support except in the few special schemes, outside Durham, which are being tried experimentally. A new form of care in sheltered housing is being tried which may make this form of housing suitable for many of the very frail people who would normally need hostel care. In Warwickshire, an experimental scheme is opening, where, in addition to the warden, there will be a full-time nurse provided by the Area Health Authority. A similar scheme is planned for Newcastle-upon-Tyne where there will be two resident wardens and two full-time case assistants/home helps. In both schemes, tenants will have their own independent dwellings but there will be extra help available to ill tenants and assistance to those who need help with such activities as getting dressed in the morning and going to bed at night. Luncheon clubs may also be provided for tenants.

The researcher anticipates that this form of care will become popular as an alternative to hostels, because it allows tenants to retain a high level of independence, although requiring a considerable amount of support, and in the future, some of the blocks of sheltered housing flats may cater exclusively, or mainly, for the very frail.

It is interesting that a survey of elderly people in Newcastle-upon-Tyne (1976) found that elderly people in the community specified that the ideal conditions of an old person's hostel were "single rooms, keeping one's own room key, the opportunity to entertain guests, social activities, making one's own snacks, having a choice of menu and being allowed to have one's own furniture". This specification is very similar to the new schemes described above.

In addition to the advantages to tenants, sheltered housing offers advantages to other sectors of the community.

District Councils benefit as they know elderly people are being suitably housed and underoccupied council housing is freed for use by younger families on their waiting list. In County Durham, great care and thought is given to the care of elderly people and District Councillors gain credit in the eyes of their electorate when they show their concern in a practical way by the provision of sheltered housing.

District

Councils have control over housing but little control over the provision of welfare facilities. The provision of sheltered housing allows them a direct way of providing some support for the elderly people of their district.

The County Social Services Department gains much when such housing is provided as it is believed that it reduces the calls made on their resources and yet provides a solution, or partial solution, to many of their problems. Fewer visits are required by social workers to watch over elderly people, less hours of assistance by home helps are required as the dwellings are small and easy to run, and it is believed that it reduces the number of tenants needing to move into their hostels.

The relatives of elderly people who move into sheltered housing often gain much because they are no longer solely responsible for the elderly person nor do they have to call at frequent intervals to ensure that all is well. This may provide great relief especially where they live some distance away or have physical or psychological burdens placed upon them by the elderly person on each occasion that they call. Relatives know that help is available almost twenty-four hours a day and that the warden will inform them if an emergency occurs. Although relatives still play an important part in the care of tenants, the work is easier because the dwellings are easy to clean and they too can get advice from the warden as regards the best way of dealing with problems associated with their elderly relative.

Where owner occupiers move into sheltered housing, their capital is freed and they may wish to give some of the money to relatives. Even where the elderly person keeps all the money, the relatives are assured that the elderly person has money for daily living and that they do not need to provide extra finance.

The community as a whole gains in that, eventually, it may realize there are good ways of caring for elderly people which allow them to grow old gracefully yet without many of the practical problems of daily living. Old age may be seen in a more pleasant light rather than something to be greatly feared. It gave the researcher great pleasure to see the happiness of most tenants and the social life which they were able to enjoy. Where schemes are provided in almost every village, elderly people can remain in the village and share its social life and contribute to its culture. Families and friends can remain near to each other without becoming a burden on each other and the release of family housing is welcomed by the younger generations who find it easier to obtain council housing.

Chapter 3DESCRIPTION OF SHELTERED HOUSINGACCOMMODATION

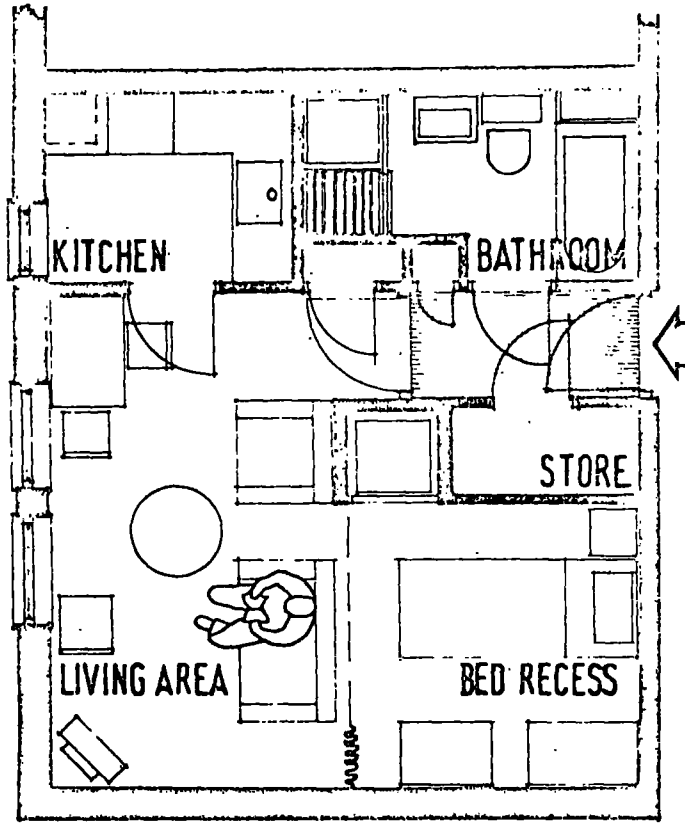
The dwellings in sheltered housing schemes in County Durham have all been designed for use by old people though only some were purpose built as sheltered housing. The accommodation is all in flats or bungalows in groups of around thirty dwellings and the main difference between schemes is whether communal facilities are contained in the same building as the dwellings and can be reached via heated corridors or whether, if any are provided, they are in a separate block.

The Department of the Environment calls the self-contained flats in blocks with integrated communal facilities "Category II housing" and in the past it was assumed that the dwellings in such accommodation would be occupied by tenants with restricted mobility, who would want to share a social life based on activities within the same building. Self-contained bungalows or flats covered by a warden and having an alarm system but not linked directly to communal facilities are known as "Category I" and designed to accommodate "old people of the more active kind". (Ministry of Housing and Local Government Circular 82/69.) It has now been realised that it is not possible to house the two types of people separately for active old people gradually become less active but the terms "Category I" and "Category II" are used in this thesis as a convenient way of describing the two types of sheltered housing schemes.

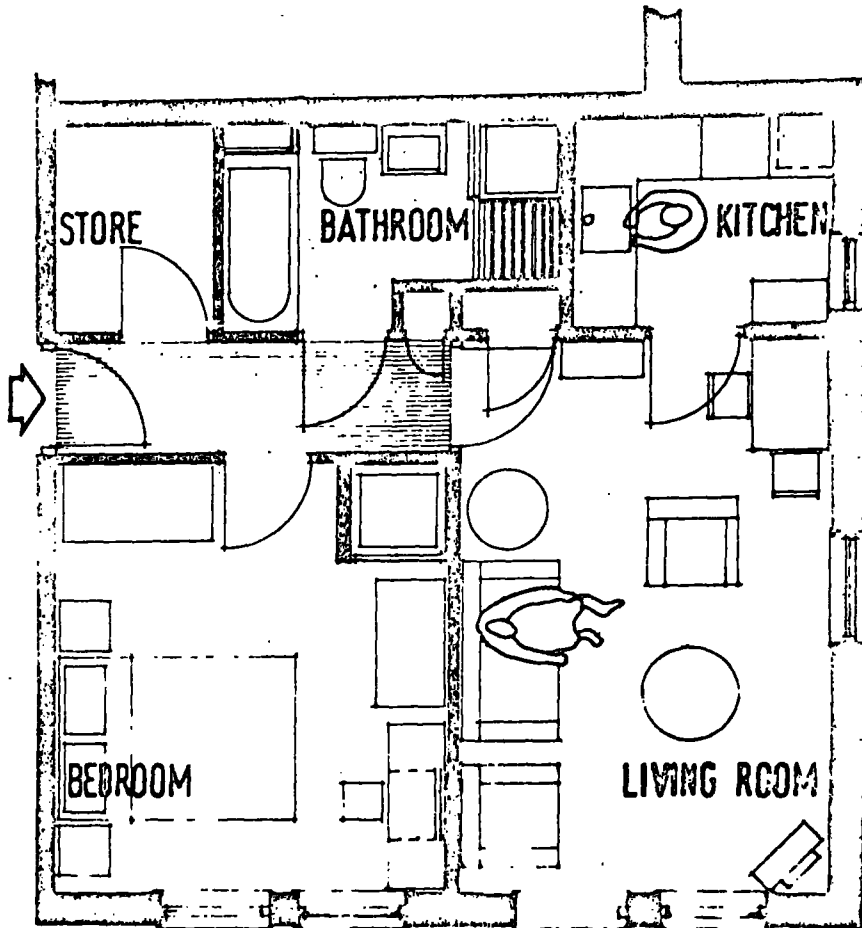
S There is a considerable variation in the mix of Category I and II schemes in each district in County Durham. When making new provision the choice is influenced by the level of provision in the district, what is already available, if any, in the town or village, the size and topography of the site, the purpose for which counsellors and officers envisage sheltered housing, and whether there are any existing old people's bungalows in close proximity which could be converted into sheltered housing. The districts with little provision of sheltered housing tend to provide mainly "Category II", probably as only the most frail and elderly in the district will be accommodated and it is especially convenient for them to have communal facilities close at hand and easier for a warden to support them if they are living in the same building. In the districts where sheltered housing is provided for many old people, and where places are available for active as well as frail old people there are likely to be a high proportion of tenants in any scheme requiring little or no help from the warden. As most old people tend to prefer bungalows in these districts there tends to be a high proportion of "Category I" schemes. (Page and Muir 1971 (b), Kaim-Caudle et alia 1965, Hole and Allen 1962, plus comments from Housing Managers.)

Sheltered housing dwellings usually consist of a lounge, kitchen, bedroom and combined bathroom and toilet, though in some cases flatlets have been built where the bedroom and lounge are combined. Each dwelling has its own front door and the delivery of letters and milk to this door emphasises the independence of the tenants. Table 4 (by courtesy of Anchor Housing Association) shows typical layouts of bedsitting rooms and one bedroom flats.

Table 4



TYPICAL SINGLE UNIT



TYPICAL DOUBLE UNIT

The "Category II" scheme must include warden's accommodation, a common room, a laundry and a public telephone for tenants. A warden's office and a guest room are optional extras. (Ministry of Housing and Local Government Circular 82/69.) Many new "Category I" schemes have an adjacent communal hall, in some cases, with a guest room and laundry, but a number of schemes exist which have no communal facilities at all.

The "Category II" blocks of sheltered housing have all been purpose-built in the last ten years but many of the bungalows were originally "independent" dwellings.

Flatlets

All "Category I" and most "Category II" sheltered housing dwellings consist of self-contained dwellings and tenants are usually highly delighted with them. However, in some schemes "flatlets" are provided and it is about these that much controversy occurs.

The word "flatlet" is confusing for it is used to describe dwellings where there is a combined lounge-bedroom and/or some sharing of bathrooms. Flatlets mainly comprise a combined bedroom/living room, a small kitchenette and a toilet with wash basin. There may be a bathroom in the flatlet or it may be off the corridor and shared with up to three other tenants. The purpose of this type of housing is to provide smaller, labour-saving accommodation for the less active single old people. It is expected that the communal areas will be used as an extension of the flatlet to counter the smallness of the accommodation.

Most Housing Managers commented that flatlets were much harder to let than other forms of sheltered housing and various surveys also show them to be unpopular (e.g. Ministry of Housing and Local Government Survey 1966, Hole and Allen 1962, Institute of Housing Managers 1967). However, most research does not distinguish between the lack of separate bedroom and the necessity of sharing a bathroom, though it would appear both are disliked.

One reason for having a bathroom outside the flatlet is that frail people have a better chance of being found if stuck in the bath, and that a variety of bath types, or a shower can be provided to suit the varying physical needs of tenants. In practice few special baths, or even bath-aids such as removable seats, are provided although the wardens believe that a number of tenants have difficulty using normal baths. Another advantage claimed for shared bathrooms is that tenants do not have to clean the bathrooms themselves, something disabled tenants may find difficult. This does not work out in practice for, either the warden must clean the bath or the tenant may struggle to clean it in preparation for the next person. Where they have their own bathroom they can leave it for their home help to do.

In the past, toilets were sometimes shared but this has not been permitted since 1969. As the onset of incontinence is often delayed or prevented by giving an old person easy access to a toilet, this seems a sensible requirement.

Combined bedroom and living rooms are sometimes provided for single tenants in the belief that they are easier to maintain and therefore more suitable for the more infirm. Before the days of frequent provision of central heating they were sometimes advocated to save old people having to go into a cold room at night (Parker Morris Report 1961). However, the bedsitters are unpopular with most tenants, mainly because they spend the majority of their time in their own home and would welcome the change, for reasons of variety, that they would get if they could go to bed in another room. The rooms are often very crowded as the tenants want to keep as much of their furniture as possible, and some feel very claustrophobic living in the same room all day. Some tenants, especially women, find it embarrassing to ask visitors into a room with a bed in it and in many cases the bed recess is at the back of the room and not much light reaches it. (See Table 4.) This darkness is particularly disliked when the tenants are ill or wish to spend considerable time in bed.

All the Housing Managers interviewed, found flatlets harder to let than self-contained flats with separate bedrooms although it would appear that some tenants are willing to take flatlets, if places in sheltered housing are very hard to obtain in the right location.

It is likely that in future, as standards rise, flatlets will become even less popular and harder to let. It seems ironic that shared facilities in sheltered housing schemes are offered to old people in areas where Council's points schemes give high priority to people who, prior to entry are "living in rooms and sharing fixed bath or shower or w.c." (Borough of Darlington Housing Services Department, Selection of Tenants, a brief guide to the points scheme, 1974.)

Sheltered housing is built to last at least sixty years and attempts have to be made to meet future expectations. The following statement made in 1967 would be acceptable to few today :-

"It was said that tenants did not object to the use of communal facilities [baths, toilets and showers] and that any objections were not valid because hotel residents do not appear to object to sharing sanitary facilities."
(Institute of Housing Managers, 1967.)

Most people now feel that wherever it is practicable, sheltered housing dwellings should be completely self-contained and should contain a separate bedroom. However, when preference for superior or larger accommodation is expressed by tenants this must be treated with caution unless small, less superior accommodation is markedly cheaper. The costs of different "qualities of service" and size of accommodation is shown in Chapter 4 and discussed in Chapter 8.

Separate Bedrooms

Most flats and bungalows visited had one double bedroom. In contrast to flatlets, one bedroom (two person) accommodation is suitable for couples or a single person and this gives flexibility to the allocating agency for when a vacancy occurs the tenancy can be given either to a couple or to a single person.

Some bungalows have a second bedroom although most dwellings are occupied by only one person and one district has a policy of always providing two bedrooms in its elderly people's bungalows. In areas where all old people in local authority housing for the elderly are under the care of wardens, two bedrooms are often built because the council are aware that the age structure of the district could change.

In the future, they might want to use some of the bungalows for younger age groups, including married couples with their first child. Whilst it is prudent to consider the future, it may be extravagant to have, for that reason, two bedrooms in all old people's bungalows. The other reasons are that some elderly people will wish to have a spare room for visitors (although the provision of a guest room largely overcomes this problem), there will be a few unmarried couples, who need separate rooms and some married couples who would like separate bedrooms on health or psychological grounds.

The researcher found that tenants in one bedroom dwellings never spoke of the need for a second bedroom themselves although the wardens said that relatives or friends occasionally had to stay overnight to care for ill tenants. In these cases, the tenants usually stay in their own bedrooms and the relatives or friends slept on the settee or a folding bed in the lounge, or in the guest room. Where dwellings had a second bedroom, the majority often did not appear to be used except as a junk room and for an occasional visitor.

Communal Hall

Most schemes have a communal hall where tenants can go to meet other tenants and to participate in group activities. The halls vary greatly, and range from a small room with canvas-backed metal chairs to luxurious furnished suites with a big hall, smaller television room, library, hobbies room, shower, coffee kitchen and meals kitchen. Easy access to social activities is particularly important where tenants have difficulty with walking and are unable to visit friends or clubs outside the scheme.

Hole

Home and Allen in a study of sheltered housing said they found :-

"Opportunities for social contact are an important component in the old people's general satisfaction with their dwelling ... provision for social contacts should be regarded as a central and not a marginal part of an architect's brief when planning a scheme."
(Building Research Station Current Papers Design Service, undated.)

Where halls are pleasantly furnished with fitted carpets and upholstered chairs, the rooms are used more frequently for casual visits and are usually given more attractive names such as "lounge" or "sitting-room".

The warden of each of the thirty schemes visited by the researcher was asked about the social events held for the tenants. The most common number of organised activities was two a week. The most common activities were coffee mornings, bingo, dominoes and whist drives. These activities are not attended by all of the tenants, the proportion attending varied enormously from scheme to scheme, as tenants are quite free to ignore the social events if they so wish. The schemes which had most activities tended to be the ones where elderly people living nearby in independent housing were encouraged to attend. Popular activities included education classes, dressmaking and repair sessions, physical training, choir and luncheon club. Most groups have a weekly five or ten pence raffle and the profit is used to provide free outings, and a Christmas party.

The level of social activities mainly depended on the enthusiasm of the warden and her personal timetable, although a few schemes had a tenants' committee which helped to organise social activities. Some wardens considered their tenants only wanted evening activities once a week, or even once a month, whereas others organised almost daily evening activities which are well patronised. The wardens reported that many tenants were active in outside groups such as the "Over Sixties Club", "Darby and Joan", "Salvation Army", Church Clubs, as well as visiting public houses. In some schemes, no activities are organised on the evenings when other outside groups hold events. Many wardens said there were activities for tenants in the scheme or the near neighbourhood almost every night of the week.

Whilst the personality of the warden appeared to be the main factor in influencing the frequency of social activities, these were also influenced by the age of the tenants. As tenants grow older, the wardens reported, they become less interested in social activities in the hall and where there was a higher proportion of very old tenants there were fewer people wanting to attend social events.

Though communal activities are supposed to reduce isolation, Page and Muir (1971), in a study of tenants in Hanover Housing Association schemes, found that the idea of a common room was less popular amongst those who by various measures might have been expected to benefit most: those living alone, those who did not belong to clubs and those who had least contact with their neighbours.

The Ministry of Housing and Local Government Study (1962), found that common rooms were used less in very large schemes and suggested the provision of several small rooms or facilities to encourage their use, such as the provision of coffee, daily papers and a good view. Emerson and Sheppard (1967) found that large rooms were used less than more homely small ones and suggested :-

"there is something to be said for having two smaller rooms, one of which can be used for television but this means the loss of a room large enough for occasions such as birthday or Christmas parties, when everyone may wish to be present. A large room divided by folding doors may be one solution ... It has been found that small sitting-spaces, for example, near the main entrance or at the head of a staircase, have proved popular, and they should be included where possible in the design."

The researcher found the halls, however well furnished, were rarely used for casual visits, she only saw three people using these rooms in visits to schemes, but the "cosy corners" referred to by Emerson and Sheppard (1967) seemed popular. It is therefore regrettable that there is now a move to ban these casual groups of seats as they are considered a fire risk.

The schemes visited, needed a large room for social activities, for there were usually some occasions when most tenants attended events. In some cases, the halls were used for luncheon clubs for the neighbourhood but these were usually "Category I scheme" halls, for some housing departments and wardens felt that the hall in "Category II schemes" was an extension of the tenants' home and should therefore not be open to other old people in the neighbourhood.

In some schemes there was a colour television provided for the use of tenants, although most tenants had their own television. * In some schemes the tenants enjoyed watching in the hall in the company of other tenants especially where coffee and biscuits were served during the evenings. In other schemes, the communal television was not used at all and its use seemed to depend on whether or not there was a friendly atmosphere in the scheme.

Regular chiropody sessions are often held in the communal hall. In some schemes, a freelance hairdresser came in and did the tenants' hair for them. This was either done in the tenant's home or in a basin in the communal room.

Where no hall was provided, it was often not missed, especially where there ^{were} ~~was~~ plenty of activities in the neighbourhood for tenants to attend if they so wish. A few wardens would have liked a hall and in the mean time use their own home or, if provided, the guest room for an occasional social event. Tenants in a scheme with no hall of their own, were sometimes encouraged to attend events in the hall of a nearby scheme, but this offer is very rarely taken up.

Fox (1971) found that the provision of a communal hall and other communal facilities had wide implications and wrote :-

"Perhaps the difference between those schemes which do not have any additional communal facilities and those which do are that in the latter the warden tends to adopt and be seen in a more formal, organizational role, and also that such schemes tend to be rather more self-contained, partly because of the extra services which they provide internally."

* Tenants in sheltered housing schemes pay only five pence per year for a television licence. (Statutory Instrument No. 548, The Wireless Telegraphy Regulations 1970.)

Where schemes are very well located for social events it may not be necessary or advantageous to have an extensive range of communal facilities. If tenants are able to participate in activities in the surrounding neighbourhood they may feel more integrated in their local community and less of a special "handicapped" group.

In most schemes there were a few people who disliked the personality or behaviour of some of the other tenants and did not wish to mix with them socially. The wardens reported a number of short and long term disagreements which tended to spoil the atmosphere of the scheme. The atmosphere was also dampened when a death occurred within the scheme and wardens found the tenants, especially those in blocks, tended to irritate each other in the autumn as the evenings got darker and they could not go out, and after Christmas when there was little to look forward to.

A good communal spirit may not arise where the warden is overpowering and tries to organise everything herself. The tenants may be afraid to offer to help organise events or not believe it is expected of them. In some cases willing tenants are discouraged from helping at social activities by other tenants who taunt them by making such comments as "who do you think you are? Do you think you are the warden?". Even where a tenants' social committee is set up there is sometimes a tenant, usually a past member of an organization run on formal lines, who wants to run activities under strict committee procedure. This causes conflict between those who like the formal method and those who want a free and easy method of discussing joint activities.

Laundry

A communal laundry is provided in all "Category II schemes" and in a few "Category I schemes". These usually have an automatic washing machine, a tumble dryer and a sink. No charge is normally made for the use of these machines, although tenants on supplementary pensions may receive an allowance for the use of laundry services. The use of the laundry depends very much on whether the warden thinks the old people are capable of using the machines on their own. Where use of the machines is expected most tenants use the machines regularly whereas in other schemes they use the machines only if the warden gives constant advice and assistance.

Guest Room

Guest rooms are optional in sheltered housing schemes, although most new schemes have a two-bedded guest room. A small charge is made for the use of this room to cover the cost of laundering the sheets. The room is mainly used when the tenants have visitors from afar, but it is also used by relatives who wish to stay near an ill tenant. In such circumstances, the relatives do however prefer to sleep on the settee or on a camp bed in the same flat as the ill person.

A bathroom needs to be provided for any guest room and where there are no communal bathrooms, (see page 25) it is better that this bath is free-standing and has a shower. It can then be used by any tenant who can only manage a shower, or who needs help from a bath attendant.

The guest room may also be used by a relief warden if she needs to sleep on the premises while on duty. In a few cases, the emergency alarm bell can be made to ring in this room or an alarm master can be plugged into a special socket. Where this is the case, the relief can be called directly during the night if an emergency occurs. Where no such alarm bell is provided, the main warden, although off duty, has to answer the emergency call and notify the relief that her help is required.

Gardens

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Most schemes have [pleasant] communal gardens around them which are maintained by the Council. Although some tenants might like a private garden, these are rarely provided. Page and Muir (1971) asked tenants in the "Hanover Housing Association Schemes" if they would like a garden and found that the desire for a garden was partly influenced by whether the layout of the accommodation offered privacy from neighbours and the public. The demand for a private garden was reduced when the design of the building or the provision of a patio gave the tenants some outdoor privacy.

Around bungalows there were usually some borders which tenants could fill with flowers if they so wished. Raised flower beds and planting boxes can give pleasure as they are easy to maintain but few were provided in the area.

Warden's Accommodation

In every scheme, there is accommodation for the warden near the tenants. Where bungalows are provided the warden's accommodation is either identical to that of the tenants or a three-bedroomed house. In the "Category II schemes", the accommodation is usually a three-bedroomed flat with enough space for a warden with children to live comfortably.

Often the alarm bell only rings in the warden's home. This means that the relief has to sit in the warden's home while on duty, or the warden has to call the relief in an emergency. In some schemes the relief is expected to sleep in the warden's home while the latter is on annual leave. This is clearly unsatisfactory as the warden may wish to spend her holiday at home. Even where a duplicate alarm master is provided, the only telephone is usually in the warden's home and the relief must go there to telephone relatives or call the emergency services.

In a few cases a small office is provided for the warden, usually adjacent to her dwelling. The alarm master and all the records are kept in this room and it can be used for interviewing officials and relatives who wish to speak to her. The Department of the Environment will subsidise the cost of a warden's office, but few are provided in County Durham.

Telephone for Tenants

The Ministry of Housing and Local Government Circular 82/69 lays down that there should be a telephone with a seat adjacent for the use of tenants in every "Category II" scheme.

Unfortunately, this has been omitted in some schemes to save costs, although in the schemes which have a public telephone, there is often a small profit after refunds on the coin-operated telephone have been made to the local authority. *

Where no public telephone is available, the warden often lets the tenants use her telephone for special occasions but as this means that they have to go into the warden's lounge, this arrangement is unpopular with both parties. In addition, if relatives wish to check that a tenant is well or recovering from an illness they have to ring the warden. Where a public call box is provided, the relatives sometimes ring at a pre-determined time and the tenants wait in or near the box until they receive the call.

Lack of easy access to a telephone may prevent tenants making social calls, ordering shopping and it may reduce their ability to control their own lives. The latter is most important. Very frequently, the warden makes all calls to official bodies on behalf of her tenants and although she does this to be kind, it reduces the areas under the tenants' own control. For example, if they make their own calls to request a home help, they are able to describe their own problems and learn what help is available. This can be very valuable for them and works well in the schemes where the warden does encourage tenants to do as much as possible for themselves, although there will be some tenants who will always need help and encouragement to contact outsiders. Even slightly deaf tenants can be encouraged to make their own calls if an amplifying device is provided in the handset.

* 183 twopence calls (or the equivalent) need to be made a week to cover the cost of renting a coin-operated telephone.

Heating

Almost all dwellings in sheltered housing schemes have central heating and, apart from ceiling heating which is greatly disliked, the tenants are very happy with their heating arrangements and find little or no difficulty regulating it, provided the warden has given them careful help and advice when they first move in. In "Category II" housing, all corridors must be enclosed and heated so that tenants use communal facilities without having to go out in the cold.

Where tenants pay for heating according to the amount they use, as opposed to paying a flat rate charge, they are usually very conscious of the costs and a few tend to economise beyond the level of comfort and safety although in most cases the wardens suggested that the tenants have adequate money to pay for heating but are too much afraid to spend continuous money on themselves. The wardens play an important part in encouraging tenants to use their heating sensibly and, where applicable, will encourage them to apply to the Supplementary Benefits Commission for a heating allowance. The temptation to economise does not exist where tenants pay a flat rate for their heating and lighting. Unlimited heating is popular but needs to be associated with well-insulated accommodation with good regulating equipment. Many wardens and tenants complained of abuse of the flat rate subsidised heating, and equally disliked unsubsidised flat rate charges based on the total heating bill of the scheme because they had to pay for heat wasted by other tenants.

Durham is a coal mining area and some of the bungalows which have been converted into sheltered housing units have coal fires.

Most of the tenants in these dwellings have had coal fires all their lives and do not wish to change to any other form of heating, although tenants with similar backgrounds who have moved to accommodation with central heating always seem to like it. However, even the most efficient coal fires and stoves require fuel to be carried in, ash to be carried out, grates and flues to be cleaned; all this work becomes difficult for tenants if they find it hard to kneel down and get up again. When tenants are ill in bed, they need extra heat and the warden, friends and/or relatives have to call frequently to attend to the fires. Where a tenant has a home help to clean the fire and carry the coal in, the home help has to call every day of the week. The County home help organiser estimates that this may take up to three hours work a week.

Design Features for the Safety and Convenience of Elderly People

"Old age is not a disease and old people are not a special class of individuals. But their physical limitations and the infirmities to which they are prone must be taken into account by the designers. Some body movements - bending, stretching and reaching - and also hand movements, like gripping, are affected by disorders of the joints and veins. As they become older, elderly people also tend to be slower in their movements and to get out of breath and tire more quickly. Their hearing, smell and sight are apt to become less accurate. This reduced sensitivity, combined with slower reactions, physical frailty and a tendency to dizziness, may lead to serious accidents. It is tragic that death as a result of accidental falls, burns, scalds and gas poisoning are much more frequent amongst the elderly. If these difficulties were better appreciated, some of these accidents might be avoided."

Grouped Flatlets for Old People (1968).

acute?

Although tenants in sheltered housing vary greatly as regards their health and physical condition, it is suggested that all accommodation should be planned from the outset so that it is suitable for the increasingly frail.

There are many books and articles giving advice on designing accommodation suitable for elderly people and the Department of the Environment has produced many circulars giving design ideas and has laid down some mandatory requirements. If mandatory requirements are not met, the scheme will not qualify for subsidies and loan sanction. As a result of this information, most schemes are very well designed and appreciated by tenants though there are usually a few bad design features such as no provision for the relief of wardens, alarm pull cords in the appropriate parts of the room, schemes located in quiet back streets with poor access to community activities. Fox (1971) commented that when he was a Department of the Environment adviser travelling around the country he was appalled to see different authorities making the same mistakes, which could have been avoided by a wider dissemination of information and model design.

The purpose-built units are usually on two floors and yet few lifts are provided as there is no allowance for them under the Government subsidy schemes. In schemes with no lifts, none appeared to have been designed so that a lift could easily be added at a later date.

On each visit the researcher was told: "of course, we only let the flats on the first floor to active old people", and little thought seems to have been given to the future of these tenants. As most schemes have been occupied for only a few years the people on the top floor are usually still fairly mobile. But later, these people may find the stairs very difficult and if they are totally unable to use the stairs, they will have to face a removal to the ground floor when a flat becomes vacant or they may choose to remain on the top floor and become housebound.

Where the latter choice is (voluntarily) made, it nonetheless causes very great distress and unhappiness, as tenants cannot join in any of the schemes' social activities or get out of the building.

Mobility Housing

It has sometimes been suggested that all sheltered housing should be "mobility housing", that is "modified ordinary housing to be more convenient for handicapped people to move about and live in". (Goldsmith 1974.) It is not, however, a substitute for special "wheelchair housing" which severely disabled people require. Goldsmith, the Department of the Environment's adviser on housing services for disabled people, gives three essential design criteria for "mobility housing" (1974) :-

1. The entrance must have a ramped or level approach and a flush threshold.
2. Entrances and principal rooms (living-room, dining-room, kitchen and at least one bedroom) must have 900 mm doorsets and circulation spaces serving these rooms must be at least 900 mm wide.
3. Bathroom and W.C. must be at the same level as the entrance.

Goldsmith also lists some design features which can be incorporated in "mobility housing" with advantage. He points out, although writing about disabled people of all ages and "mobility housing" :-

"not all people who use wheelchairs are confined to them. An estimated 50% use their wheelchairs only outside their homes, for example, to go to work, to go shopping, or when going out for a day in the car. Of those who do use wheelchairs at home there is a sizable proportion - again perhaps 50% - who are not chairbound and can walk a short distance unaided or with support from furniture, handrails or another person.

All this suggests that what is wanted for many handicapped people is a dwelling with a front door wide enough to admit a wheelchair, bedroom and bathroom at ground level and (even though space provision may not be generous) the possibility of moving a wheelchair between principal rooms."

He emphasises the point that "mobility housing" costs very little extra to provide, if planned from the outset, and that :-

"The considerable potential benefits of mobility housing for handicapped and elderly people in general suggests that there should be no limit to the amount which local authorities should aim to construct."

However, to provide "mobility housing" in sheltered housing schemes would mean that lifts are required for each dwelling, to enable tenants to reach every flat without having to negotiate any steps or stairs.

In each scheme a few "wheelchair housing units" could be provided. Goldsmith (1975) gives a working definition of people who need wheelchair housing as "people who, on account of disability, cannot conveniently be placed in mobility housing". There are a number of old people who would welcome suitably adapted accommodation in a sheltered housing scheme and if all the dwellings were mobility housing the handicapped tenants would gain for they could then visit the homes of every other tenant in the scheme.

Goldsmith estimates there should be four one person and twenty-two two person old people's warden serviced wheelchair housing units per 100,000 population (all ages). This figure is based on the findings of Amelia Harris's "Handicapped and Impaired in Great Britain" (1971) and his own survey in Norfolk, and assumes an age structure of the area similar to the total population.

In Durham County, this would mean the provision of about 160 wheel-chair housing units. *

Location

Most schemes are located in close proximity to shops, bus stops, churches, public houses and a post office, although the nearest chemist is often some distance away. A well located scheme is particularly important for old people and the closeness of the shops was frequently commented on by tenants as being the major advantage of their scheme. Many old people have difficulty in walking far and yet they enjoy shopping for it is a constant source of interest and may be the only activity which takes them out of their homes and into contact with the surrounding neighbourhood. From the warden and home helps' point of view it is, for obvious reasons, also desirable that tenants do their own shopping for as long as possible.

As many old people spend much of their time just sitting at the window, the dwellings which overlook busy roads or thoroughfares were particularly appreciated by the tenants interviewed by the researcher. Emerson and Sheppard (1967) wrote :-

"most old people like to be able to watch something going on, and their windows may indeed provide their main point of contact with the world outside. It appears that most old people would rather be able to see the movement of traffic in a street and their neighbours passing than overlook a quiet garden however well laid out. Living-rooms should therefore look outward rather than into courtyards or on to houses similarly occupied by the old.

* Based on total population of 610,800. Source: Durham County Council population estimates for 1976.

It is obviously an advantage if living-room windows can face south or west, sunlit rooms are more cheerful as well as warmer and every effort should be made to secure one of these aspects. However, if the choice is between the right aspect and a more interesting view the latter would probably be preferred by the tenants; it can at least be enjoyed every day regardless of the weather."

Most districts in County Durham are trying to have schemes located in almost every village of any size so that old people can stay in the community they know. This allows the tenants to continue participating in long-standing social activities and makes it easier for friends and relatives to visit. Where these contacts are maintained the old people are likely to feel more socially integrated in society and the assistance of friends and relatives lessens the amount of help needed from the warden.

Links with an Old Person's Hostel

Where sheltered housing is seen as one step in the ladder of care, through which elderly people progress, it is sometimes advocated that schemes are built adjacent to an old person's hostel. The advantages claimed for these linked schemes are that the two groups of people can mix easily, thereby having an enriched social life, and when an elderly person in sheltered housing needs to move into a hostel, he already knows the people there and the move is less traumatic. Other advantages of such schemes are that cooked meals are readily available and sick tenants can be cared for in the hostel or by hostel staff in their own dwelling.

No such schemes exist in Durham but research on linked schemes (Beyer and Nierstoasz, 1967, Fox 1971, Department of Environment, Size of Grouped Schemes 1975) suggest that, in practice, most of the advantages are theoretical and do not work well in practice. For example, the hostel tenants are envious of the sheltered housing tenants and the latter are afraid of the hostel as its presence reminds them of a possible depressing future. In most schemes the hoped-for sharing of facilities did not take place and fears were expressed that the "over servicing" of sheltered housing tenants leads to the deterioration in the tenants' ability to run their own lives. It was also found that very few tenants in fact needed to transfer to the hostel but when they did, there were frequently no vacancies. Fox, a former housing adviser to the Department of the Environment commented :-

"The linked scheme concept is founded on the belief that there is an almost inevitable progression towards lasting infirmity in old people. There is some indication that, once a group is established, very few tenants will ever need the complete services of a residential home; grouped housing has not yet been established long enough to obtain firm statistics but it seems that few such tenants are ever admitted into residential care (possibly as low as five per cent). This suggests that it may be possible to concentrate services to this small minority within a grouped housing scheme itself, to enable a very desirable objective to be achieved - that of being able to stay in one's own home until the end of life." (1971)

WARDENS

The success of a sheltered housing scheme is, to a large extent, dependent on the ability of the warden to respond sensitively to the tenants' needs by underlining their independence rather than undermining^{ing} it. Emphasis is on help of a friendly and neighbourly nature, but is not a nurse-patient relationship. The warden is not expected to perform regularly tasks for which statutory or voluntary services already exist, e.g. nursing, meals, domestic help, though temporary practical help may be required in cases of illness until other help arrives.

It is hard to specify the qualities which make a good warden but a working party set up by Age Concern on the Role of the Warden in Grouped Housing (1972) suggested that :-

"The right kind of person is perhaps easier to recognise in a face to face situation than to describe in words. The ideal personality must include, first and foremost, a genuine but not sentimental concern for the elderly: a concern which is easily recognised by those being helped and is not something claimed as a uniform or formal qualification. The right kind of warden will be able to act sensibly, responsibly and quickly in times of emergency, be able to service her tenants without favouritism, without domination but at all times respecting their independence and individuality. A sense of proportion, an even temperament, a personal stability and maturity - all are important elements in the personality of the warden. None of these are created by training, by paper qualifications or experience alone; they are part of the person herself, but even the 'right kind of person' needs to be shown how to do the job." "The working party is insistent, like many of the employing authorities who gave evidence, that the outstanding criterion in considering anyone for appointment as a warden is the personality of the person in question. The Working Party's later recommendations [on training] are of little avail if the right kind of person is not chosen."

Another useful description is given by Miss Marion Bradley, quoted in Beyer and Nierstroasz (1967) :-

"The essential thing is that the warden should be rather of the "goodwife" type than anyone with nursing or medical qualifications. There are two reasons for this. One is that the emphasis at all times should be that the environment is going to keep the people well, whereas the appointment of a registered nurse gives the impression that illness is expected. Secondly, the chief requirement in making a person comfortable in his own home, is not medical care but keeping the place warm and bright. A home is not a hospital ward, and the need is for someone adaptable who can do small household chores, and above all, do these things within the framework of the tenant's own home surroundings which may not be especially clean or tidy. The ideal warden should have a warm personality, but should be able to remain detached from the tenants to a certain degree. She should be interested in their doings, but she must guard against becoming the centre of a tenant's life or affections. She has a duty to many tenants, and cannot possibly substitute as maternal figure for any one tenant. Above all, she should encourage the tenants to be self-supporting to the greatest possible degree, and should stimulate them to as much physical activity as they are capable of, while recognising the limitations of their physical abilities and their right to their personal tastes."

The researcher visited thirty-two schemes and felt that the wardens were delightful women who fitted the description "good neighbour" very well. The wardens were all women, nearly all were married and many had older children living at home with them. The wardens were mainly in their forties and early fifties and of working class origin. The job was popular and there were usually several good candidates applying for each vacancy. A number of wardens had worked as care assistants in old people's hostels and a few were ex-nurses.

The wardens were paid according to the number of units of accommodation covered and the range of duties they performed. The levels of pay were negotiated by the National Federation of Public Employees and in March 1976 a warden in a scheme of thirty flats received around £30 a week. This was a similar salary to that received by a care assistant in a hostel.

The level of pay took no account of the level of dependence of tenants although one warden might have fifty fit tenants whereas another might have a small number but a high proportion of them needing much assistance.

Each district had slightly different expectations of its wardens but the following list provides a general guide to their responsibilities. *

1. To act as a 'good Neighbour' and 'friend in need' to whom the old people can turn for advice and help but at the same time to ensure that the privacy of the tenants is not interfered with in any way.
2. To be on call at all reasonable times to give assistance to any residents in case of emergency for which the call bell or warning system has been provided.
3. To make arrangements for answering emergency calls from the tenants and to summon the doctor, district nurse or other such service as may be required and to consult as necessary regarding treatment or admission to hospital.
4. To give emergency help and general assistance of a neighbourly kind in case of accident or illness until help of local services and/or relatives can be obtained.

* One to sixteen came from Northern Provincial Council guidelines and seventeen to twenty-two from Hanover Association "Notes of Interest to Prospective Wardens".

5. To ensure that any service required by a tenant is sought as soon as possible in instances other than emergencies, whether the need of the tenant is for medical, nursing, domestic, social or financial help.
6. To visit all occupants of the scheme at least twice each week (more frequently in cases of illness). On all other days when visits are not made, the occupants must be contacted by intercomm system each morning.
7. To be aware of the degree of ill health and dependence of each tenant and to take appropriate action, whether through direct or indirect supervision, to ensure that all is well with a particular person.
8. To maintain a record of the doctors and nearest relatives of each of the tenants and of the emergency telephone numbers of all local services in order that the above mentioned duties can be carried out efficiently.
9. To maintain a logbook or report book in which all incidents and emergencies must be recorded.
10. To collect pensions and prescriptions and do shopping for any tenants who so request and who are temporarily unable to do this and who have no friends or relatives to do it for them.
11. The care (but NOT nursing) of tenants who may be ill for short periods, e.g. preparation of occasional meals etc.
12. To be responsible for security and general supervision of the premises and to report any defects or repairs required.
13. To control the central heating in the communal areas and to ensure the cleanliness of all communal rooms and passages. Equipment for this purpose will be provided. In some cases, where it is deemed necessary by the Council, assistance with cleaning duties will be provided.
14. To be responsible for the control and day-to-day running of the Communal Rooms.
15. To be responsible for the letting of the guest room and collecting the appropriate fee.
16. To organise in conjunction with the Tenants' Committee (if any) communal facilities and activities for the benefit of the tenants.

17. Encourage the involvement of friends and relatives.
18. Make and maintain contact with groups in the area and use their resources.
19. Reception and introduction of new tenants.
20. Deal with any breakdown of services (such as lifts, power cuts) and call in appropriate assistance.
21. Checking alarm systems every six months, organising fire drills etc.
22. Dealing with emergency illness and death.

The duties of the warden can be broken down into six main categories :-

- A. Oversight of Tenants.
- B. General Assistance.
- C. Advice.
- D. Emergency Duties.
- E. Group Social Activities.
- F. Supervision of Premises.

A. Oversight of Tenants

In a sheltered housing scheme, the warden maintains frequent contact with the tenants in order to act as a "fail safe" method in case the tenants are ill but unable to operate their alarm in an emergency. The wardens also keep watch over the tenants to ensure that they look after themselves and she will call in medical services when these are required, and check tenants are eating enough and heating their home adequately.

The method and regularity of the wardens' visits to the tenants varies greatly. Where there are two-way intercom systems provided, most wardens call every tenant each morning to check that they have not been taken ill in the night and whether they will need any special help that day. One or two wardens repeat this call round every evening. A few wardens visit each tenant every day, just knocking on the door or going in for a short chat but most visit each tenant about twice a week but stay for a longer talk. A few only call on tenants if they are ill or have requested a visit. Some wardens give approximately equal time to everyone, mainly to 'be fair' and to prevent jealousies, whereas others call infrequently on the healthy but daily or even twice a day on the tenants who are lonely, ill or depressed.

The Age Concern Working Party on sheltered housing (1972) felt that a daily call on tenants should not be insisted upon by the employing authority but should be left at the discretion of the warden. They felt that some tenants might feel it was an infringement of their independence to be called on each day when they did not need anything from the warden. In addition, they felt that daily visiting to all tenants could distract the warden from helping the more needy tenants to a time consuming but superficial concentration of the total group of tenants. They felt that this could discourage initiative on the part of tenants and might undermine their sense of independence and even harm their relationships with the warden.

Even when wardens do not ring or call daily they keep their eyes open and in fact 'check' each tenant at least once a day. They watch for curtains to be opened, milk taken in, walks being taken.

There is the danger that too frequent contact by the warden and the presence of an alarm system gives the unintended message to the tenant that they are old and likely to have accidents or need assistance. The constant reminder that society considers they are unable to live without assistance may lead to a reduction in independent living and decision making. Once a person accepts one service, that person may feel that they are sufficiently disabled, or entitled to, many other services, and these may be provided to the detriment of their psychological and physical life.

Each dwelling is supposed to be quite independent but the way some wardens took the researcher straight into tenants' homes without asking permission suggests the tenant's privacy is not always fully respected. Tenants who have something they wish to hide from public knowledge or desire great privacy may not feel completely at ease in a scheme where the warden is always watching them and where conversation in every room can be eavesdropped on by the warden. Privacy should be highly respected but to ensure this, there is the need to clarify to the public and tenants' relatives in advance that wardens and housing departments are not responsible for the acts of tenants.

If a tenant's health deteriorates as he chooses not to call the warden if suddenly taken ill, bolts his door or smokes in bed, it is his choice and the blame should not be attached to anyone else.

B. General Assistance to Tenants

Wardens are expected to give some general assistance to tenants as and when this is needed. The most frequently given help was collecting shopping, prescriptions, and pensions, and giving temporary domestic help to tenants who were ill. These duties tend to be tidying beds, taking in cups of tea, making occasional meals, tending fires and filling hot water bottles. Relatives of tenants tend to do most of the work and only where they are unable to give sufficient help or call frequently enough does the warden give help. Some of the hardest problems seem to occur when the wardens start their job and do not know how much help they should, or are expected to, give. For example, how far should relatives be bullied to help if they prefer to leave all the work to the warden.

Only one of the wardens interviewed said that she had not done some nursing of ill tenants, although they varied in the type of help given. Wardens with previous nursing experience tended to enjoy this aspect of their work and reported they often "rubbed the backs" of ill tenants to prevent bed sores developing.

Wardens seemed to manage well with minor nursing requirements but problems arose when a tenant needed to be transferred to an old person's hostel or hospital but no beds were available. Several wardens had been left with such people over an extended period of time and claimed the extra work meant services to other tenants suffered. In addition a great strain was placed on them as their consciences would not allow them to leave the tenant unattended for any length of time. The problems were particularly hard when the tenants were awaiting a place in a psychiatric hospital. These problems are aggravated by some health and social service personnel who believed wardens provided a large amount of care and therefore ill tenants could be left in sheltered housing far longer than if they were in independent housing.

When discussing temporary assistance by a warden it is not practical to specify how long 'temporary' is, but Age Concern (1972) suggests the warden should have the right to report to her superiors when she no longer feels able to cope with a tenant's continuing special needs. The employing authority must then consider, in conjunction with the warden, what may be the best solution, e.g. home helps, extra help for the warden, modifications to the dwelling, or extra pressure on those concerned to get the tenant moved. However, since the warden's employer, the housing department, is in a different tree of administration from the social services department, it may be difficult to ensure this kind of support is provided.

No mention is made by local authority guidelines of assistance to the dying and care of the dead, although deaths are not infrequent. In the case of death, the warden has to arrange for the removal of the coffin (in some blocks the design makes this difficult), deal with distressed relatives, help relatives make arrangements for disposing of furniture and give comfort to the other tenants while at the same time managing with her own grief. The strain can be worse when the person dies unexpectedly and the body is found by the warden, for example, in a short space of time one warden found one tenant drowned in the bath and another electrocuted while trying to mend his television.

C. Advice to Tenants

The warden is a useful source of advice to tenants when they first arrive at the scheme for she explains how everything is organized. Without patient and adequate explanations, the tenants may not know what is expected of them and the accessories of modern living which are meant to help them, the alarm system, safety features, laundry and central heating, may seem impossibly difficult.

The tenants continue to turn to the warden for advice and in most cases she can give adequate help, for example, how to apply for a home help, where to go to obtain a concessionary bus pass. Where advice from elsewhere, or requests for services, are required the warden often makes the telephone calls on behalf of the tenants or helps them fill in complex forms.

Whether right or wrong, through giving help the warden tends to explain to the tenants when each service should be requested. On personal issues, such as problems relating to relatives or friends, the warden can only give her personal views although she can request a visit by a social worker where she feels this is necessary.

A few wardens did not fully appreciate the need for confidentiality and passed on information given to them privately. The tenants quickly realized this and kept personal matters to themselves but it meant that they lost the opportunity of using the warden as a source of advice. There was also the danger of the warden giving too much advice and the tenants feeling obliged to act on it if they were to continue to receive discretionary help from the warden.

Many wardens, in talking about their role, volunteered the information that elderly people are like children, they have to be humoured but when they do wrong they have to be talked to and corrected. No doubt, a few quiet words from the warden was sometimes necessary to retain a good community spirit but some wardens appeared to take their advice-giving role too far, partly because they felt they would be held responsible if anything happened to one of their tenants. Unless wardens realize that they are not responsible they may over-protect tenants by advising them not to take any actions, however pleasurable, which have a degree of risk attached to them.

D. Emergency Duties

One of the advantages of sheltered housing is that someone is at hand to help in an emergency. Every dwelling is supplied with a means of calling assistance and the warden is chosen for her capacity to handle emergencies. The number of emergencies was found to be small.

Comments were made like "under five calls in eight years", "none in the last year", "no more than one a month". The figures may be low as the wardens are good at spotting situations before they become emergencies and because many tenants dislike having to call the warden out at night and manage to wait till the warden contacts them in the morning.

Whilst tenants usually cite the provision of an emergency call system as a reason why they moved into the scheme some do not give a key to the warden and some have bolts on their doors which prevent access by the warden.

Similarly, some tenants refuse to give the warden the name and address of their next of kin whom she should contact if an emergency occurs. However, often a neighbour has a key or a key is kept under the mat, and some relatives will give the warden their names and addresses or arrange to have door bolts removed. Nearly all wardens feel it would be quite wrong to force tenants to give them a key as, to do so, would contravene the belief that wardens should not invade the privacy of tenants and to demand a key would undermine tenants' feelings of independence.

Periods when the warden is off duty may encourage initiative on the part of tenants and involve them in caring for each other. This not only increased the likelihood of emergencies being recognized but the knowledge that they are useful may be good for tenants' morale.

The Hanover Housing Association does not expect its wardens to provide twenty-four hour cover, but encourages wardens to take time off each day for shopping, and other social activities. The warden is only expected to provide cover between about ten o'clock at night and eight in the morning.

The Age Concern Working Party (1972) felt :-

"the warden's duties should not be such as to expect or imply 24 hour cover ... The warden should not be condemned to a 24 hour watch by the inter-communication system or the tenants to frequent calls from the warden in an attempt to ensure all is well ... The warden must not be so burdened by expected emergency cover duties that she feels guilty whenever she leaves the premises whether on or off duty at the time."

Most schemes aim to provide a relief warden to cover the period when the warden is off duty, on leave or ill. It appears that, in the design of many schemes, insufficient thought has been given to where the relief is to be located and often the alarm is only in the warden's home. This means the warden has to contact the relief if the alarm rings and she is off-duty or, if she is away, the alarm is unattended.

Where there is a guest room this is often used by the relief warden when she stays overnight but only a small proportion of schemes have the alarm system suitably wired through to that room. In a few cases, the relief is one of the most active tenants and although she may have an alarm bell in her flat, she may have to go into the warden's dwelling to find out which tenant is calling, unless there is a warden's office.

Where there is no night cover of the alarm system and the warden is off duty, the relief is usually expected to visit or ring every tenant in the early evening and again in the morning.

E. Group Social Activities

The warden is responsible for encouraging social activities for the tenants, although it is because of the belief in the tenants' independence that they have a right not to attend.

One of the advantages of sheltered housing is that there are many opportunities for social contacts, both informal and organized, within easy reach of the tenants' dwellings and the wardens' role is to encourage these opportunities.

At a minor level the warden ensures cards and dominoes are available for the tenants and ensures the television is working and available for those who prefer to watch in the company of others. She may also encourage some organized activities such as coffee mornings, bingo sessions, Christmas parties. Many wardens organize a number of activities of this kind but it is questionable whether the tenants could be encouraged to do more for themselves.

The guidelines for wardens which state she should "be responsible for the control and day-to-day running of the communal room ... to organize in conjunction with the tenants' committee (if any) communal facilities and activities for the benefit of tenants" assumes a leading role whereas it might be better to encourage wardens to take less dominant roles and to see their role as encouraging others to run social activities. Some wardens do encourage tenants to organize events but on the whole it appears the wardens are the main organizers. In some cases the wardens so enjoy organizing social events they become frustrated when tenants do not appreciate their efforts. The Hanover Association's Warden's Handbook perhaps gives better instructions in that it said: "The use of the common room and facilities (where provided) should be encouraged, possibly by the formation of a tenant's social group. It is perhaps advisable for the warden to decline service on this committee other than in an ex officio capacity, although anything that can be done to organize communal activities will prove of inestimable value to the well being of all". Bytheway (1974 (b)) believes freeing the warden in this way is desirable and suggests that if the warden is deemed to be underemployed if only responsible for the emergency service and the supervision of the premises, then the emergency service should be extended to persons outside the scheme rather than that the warden be encouraged to develop the very different skills of social organisers.

The encouragement of tenants in the running of events would remove some of the decisions which the housing department or warden now take, but which can irritate some tenants and make them feel they are not living independent lives. For example, the housing department has laid down that "all activities within the Communal Rooms must terminate not later than 11.00 p.m. unless specially authorised by the warden for a particular purpose", and the views of wardens tends to influence factors such as whether beer can be served at a party, whether gambling, including bingo, can take place and the times the drying room is open. In most blocks tenants have a key to the main front door but in a few schemes the warden provides a key if tenants are likely to arrive home late. One tenant was particularly unhappy because the front door was locked at 11 p.m. and the warden would not allow him to have a key when he went to the public house, in spite of there not being enough time to return to the scheme when the former closed.

The wardens should encourage links with the surrounding neighbourhood so that the tenants do not feel that they are cut off from the outside world. Many wardens were good at encouraging tenants to go out, but, where outside events clashed with those organized by the warden, there is the possibility that the warden puts unintentional pressure on the tenants to support her events. In some cases, however, the wardens encouraged tenants to go out by not holding their own events when suitable activities were being organized nearby, for example: Over Sixties Clubs, Darby and Joan Clubs.

Sometimes other old people living in the area were invited to attend functions held in the communal rooms of the sheltered housing schemes but often the numbers were restricted due to the size of the room or excluded as it was considered activities were only for tenants. The schemes that put on the most adventurous range of social and cultural activities however tended to be those where many outsiders were welcome, even if the premises were cramped. In these cases a lively social atmosphere seemed to exist and some minority interests were catered for, for example, keep fit classes, sewing afternoons, the formation of a choir, as sufficient people were interested.

F. Supervision of Premises

The warden is the representative of the employing body and has some duties for safeguarding the property, such as reporting mechanical or structural defects in the premises, arranging for the repair or replacement of defective fittings and fixtures.

There is considerable debate as to whether wardens should do some cleaning. Some people argue that the warden's time should all be devoted to looking after tenants. Others argue that the warden should have some caretaking duties, in part to contain the cost of the service and, in part to suggest to the tenants, by demonstration, that the warden has specific duties unrelated to the 'watchdog' function.

The Age Concern Working Party (1972) recommended that the warden should not have excessive cleaning duties, which possibly create, in her mind, the impression that this is her main function, it might be unrealistic to relieve the warden completely of the responsibility for the cleaning of communal areas, but she should be provided with domestic help unless the layout of the premises was such as to make only limited demands on her time.

In Durham the Local Authorities had power to appoint extra cleaners where this was thought necessary. An allowance is made for cleaning and this was added to the salary of the warden if she did the cleaning, or domestic help was employed. It was generally left to the wardens to decide whether they wanted the work and the money themselves, or wished that someone else be employed. In large schemes there was automatically help for the warden regarding the cleaning and in nearly all schemes communal windows were cleaned by a window cleaner.

SUPPORT FOR WARDENS

Although most wardens who were interviewed clearly enjoyed their job there are times when it places great physical and mental burdens on them. Listed below are some of the people or organizations who offer some help. These people give some support, but they may not be able to provide adequate support or the warden may not feel free to reveal what she believes to be her weaknesses, especially when she is new and feels that she is on trial.

Relief Warden Relief wardens were provided for two days a week and during the warden's holidays or sickness. The relief wardens are paid for eight hours each day although in some schemes they also sleep overnight in the guestroom in order to answer any emergency calls. The main warden normally chooses the relief warden, subject to the approval of the housing department, for it is essential she has confidence in the relief if she is to be able to relax while off-duty. In some cases the relief was a relative of the warden.

Many schemes had been built before relief wardens were a regular feature and no provision was made for them during their working hours. When they had finished their calls, they either sat in the common-room or guest room, used the warden's home or returned to their own home if they lived nearby. Often, the only alarm and indicator board was in the warden's flat and problems arose when calls were received, because the relief had to go to the warden's home to find out who was calling or the main warden had to find the relief to say that a call had been received.

Reliefs are employed for a set number of hours per week, but it might be better if their hours were more flexible. They could then be on the premises for a shorter time when the tenants were well, and give more time during the times of year when many tenants were in most need of assistance and when the main warden was overworked herself. To some extent this flexibility exists where the warden and relief are friendly but cannot be extended to areas where twenty-four hour cover of alarm systems is expected.

Other Tenants The wardens encouraged the tenants to help each other but the amount of help given varied from scheme to scheme. Some of the tenants felt that the provision of a warden absolved them from helping each other; they felt it was her duty to do all the work. In a few schemes, some tenants positively discouraged the more helpful from assisting the warden. In some cases the tenants would not even put the chairs they had been using in the common room straight or water their own plants outside their front doors.

Warden's Husband and Family The husbands of wardens tend to play an important role in supporting the warden, both as a help-mate in times of stress and in providing the necessary antidote of normal family life to the demands of the tenants. The husbands often carried out odd jobs for the tenants such as changing light bulbs and fuses and other tasks of a general nature, such as caring for the boiler, clearing blocked drains. Husbands often helped their wives when they were busy and one husband always went with his wife if a man rang the alarm in an emergency in the night.

The warden's job influences her home life and a husband needs to like and tolerate old people as tenants may frequently call to see his wife, or use the telephone,¹ or he will hear her talking on the intercom or arranging services and social activities. The Institute of Housing Managers' study (1967) mentioned that where there were married applicants it was found advisable to interview the husband and wife together.

1 Hardly any schemes have a telephone for tenants but many wardens let tenants use her telephone for special calls. The telephone is usually in her lounge.

Tenants' Relatives The relatives of an old person may gain as much from the acceptance of an elderly relation into a sheltered scheme as the elderly person would. Often the relatives are unable or unwilling to provide a permanent place for their old relation in their own home or the old person does not wish to live with the relation, although a close bond exists and the relatives are willing to provide some support.

The warden's role is not to be a substitute relative and when a tenant is ill or has problems the warden's role is to call upon relatives and then leave the work and decisions to them. Nearly all the tenants have relatives living nearby who come in regularly. However, some relatives were not clear as to the role of the warden and it is important that they are properly informed of the purpose of the scheme and their role in relation to it, especially when their relative first moves to the scheme.

District Housing Department Most wardens are visited occasionally by a member of the employing department, usually the housing department, to ensure that there are no serious problems. However, little or no introductory or in service training is arranged. When a warden has problems she usually has to sort them out herself. Training officers are employed by the County Social Services Department who are suitable for giving or organizing training but there is no liaison between the District and County on the issue.

Social Services Department The Age Concern Working Party (1972)

reported "if there was any unanimity of complaint from the wardens' evidence, it was on the alleged lack of support from other services which should have been available for their tenants". Fortunately this was not a major problem in the study area as there was a high level of provision of home helps, meals on wheels, old person's hostels. There is, however, diversity of opinion on how local authority assistance should be allocated. Some argue that the people in sheltered housing are those with special problems which should be given priority for each necessary service; a priority above that of old people outside the schemes. Others feel that because a warden is in residence, fewer services are required and priority should be given to those living alone.

The Age Concern Working Party (1972) considered the topic and accepted the principle that "these tenants are in no general sense special in the services that they need or do not need. They have or will have needs similar to those old people outside the scheme and they should be entitled to the same help from domiciliary and nursing services appropriate to their need. They should not expect priority services nor care from the warden outside her role".

Unions

Wardens may belong to one of a variety of unions and as a result of various activity the salaries of wardens had been increased considerably a short time before the research took place and proper arrangements made for the provision of relief wardens. It seems likely that the unions will watch the development of wardens' duties carefully and if, for any reason, these duties increase too much, the unions may step in to ensure adequate assistance is given to wardens.

Training of Wardens

When the wardens start their first job in a sheltered housing scheme, they are usually given very little guidance and no formal training. To a large extent they are expected to know how a "good neighbour" acts and to get on with the job as best they can. Unfortunately the meaning of the term "good neighbour" varies from area to area and between social classes - it can be a positive description of someone to rely upon in emergencies, for common services, for friendship and for psychological support or the phrase can have a negative ring to it - the neighbour is one who does not interfere, who keeps to himself and who is neither hostile nor offensive.

Each warden interprets the guidelines as best she can but when asked most said they would have welcomed more ideas and advice on how to do their job successfully. The Age Concern Working Party (1972) felt strongly that having chosen the right warden it was wrong to stop there. They felt there was a need to give a brief preparation to the warden before she started and later she should receive on-going training related to the problems she faced. Given, below, are Age Concern's recommendations for basic topics which should be provided in any such training.

"Briefing

1. An introduction to the appropriate officials of the housing department and/or the housing association, and a chance to learn of their roles and to ask questions about points concerning the warden's work.
2. A chance to meet those in the supporting services discussed earlier [general practitioner, hospital, home nursing, health visiting, personal social services] with, perhaps, in some cases, a day or two with the appropriate staff to learn more of their particular contribution to the welfare of the elderly. In any event this would need to be reinforced with adequate paper information on the services available and how they can be contacted.

3. A period with an established Warden to see the work in operation.
4. Possibly the beginning of some of the subjects mentioned below under the heading of 'continuous training'.

Continuing in-service training

For a warden working alone in a job for which the preparation, even if on the lines outlined above, is incomplete, the difficulties and problems of her job will bear in on her sometime after the excitement of settling in has passed. It is at this point that further training can most usually and productively start: by then she is one for whom the problems, issues and techniques are no longer theoretical but intensely practical and relevant. ... The Working Party would stress the adjective 'continuing', preferring to think in terms of on-going training rather than something when completed in a set period is then at an end. ... The use of informal teaching methods in small groups rather than the lecture style programme seems most appropriate. It must be remembered that the wardens who attend these courses are essentially practical people facing practical problems who above all want to talk to and learn from the experts and from one another. ...

1. For those without first-aid experience, some training in these skills including lifting techniques.
2. Some knowledge of the physical and mental aspects of old age.
3. The problems of the mentally confused and handicapped old person.
4. Social and recreational activities for the elderly.
5. A knowledge of the range of services available for the elderly, their use and benefits.
6. Dealing with emergencies on the premises - advice, for example, from fire and police services.
7. Information about any new legislation or regulations likely to affect wardens and their tenants."

One problem arising from good briefing of a new warden is that it lengthens the time between the old warden giving in her notice; (usually one month's notice is required) and the employing authority advertising for, interviewing and briefing a new warden. As the resignation of a warden, although rare, is likely to cause distress for some tenants, perhaps a longer period of notice would be preferable in order that the new warden could spend a short period of time working alongside the old warden.

A few people query the value of training wardens as they feel it might be detrimental to the success of the warden in running a scheme. One danger, which does have to be recognised, is that training which gives too much emphasis on one aspect of the warden's work may change her view of her work. The National Old People's Welfare Council (1974) found that training changed the expectations of the warden towards a more welfare-orientated role, while she continued to be employed by the housing department in a primarily caretaking capacity. The Age Concern Working Party (1972) felt a warden with the right personality could be helped by suitable training but were concerned that where a warden had nursing qualifications there was a potential danger of biasing the warden service towards a type of residential district nursing service which they felt was inappropriate. This is in great contrast to old people's hostels where it was recently recommended that there should be at least one Certificate of Qualification in Social Work holder on duty or on call at all times (Manpower and Training for the Social Services, 1976).

Most of the skills required by a warden are those of a "good neighbour" and the opportunity to employ many caring people might be lost if wardens had to have a formal qualification before commencing work. Much of the success of schemes appeared to be due to the warden having a similar background to the tenants, coming from the same village and, in many cases, having known the tenants for many years. It is unlikely that these women would travel to attend any training course before being able to apply for a job for, as with the tenants, many wardens are only prepared to work in specific locations and vacancies only occur occasionally.

Conclusion

The researcher was very impressed by the quality of wardens recruited in Durham and the tenants were normally very pleased with the help and friendship they received from the warden. The warden aspect of sheltered housing appears to be the most vital part of the service whereas other aspects such as communal facilities, alarm systems and social activities are much more peripheral.

The assistance given to tenants by wardens often went far beyond the minimum requirements and probably whenever suitable people are appointed they will become a real friend to most tenants and act out of kindness as well as out of duty. There is however a danger of wardens doing too much for tenants who feel that once they are in sheltered housing, someone else will do all their work. Some wardens commented that the tenants become very dependent on them and one said "they want all the advantages of a residential home without being in one".

However, having appreciated this fact, the wardens usually encouraged the tenants to do things for themselves and not to depend on the warden or their relatives for things which they could manage themselves. The wardens found they could "train" their tenants in what help they were willing to give and although each warden varied in the amount of assistance which they could give, in almost every case the tenants accepted this as reasonable. Despite being willing to accept more help, even when they could manage unaided, most tenants appreciated the help given by wardens and considered themselves fortunate in having her services.

TENANTS

No detailed study of tenants' characteristics was carried out, but each of the thirty wardens visited was asked, in general terms, about the ages and health of tenants and the help they required from her. The answers suggested the average age of tenants was around seventy to seventy-two years, the youngest tenants being sixty-five to sixty-six and the eldest eighty-eight to ninety-one years. Very few tenants had serious physical disabilities, such as severe arthritis or paralysis from a stroke, though many had minor physical problems. However, where tenants did have severe physical problems most managed extremely well in sheltered housing.

Sheltered housing can be suitable for people with quite considerable degrees of incapacity, for tenants do not need to be able to clean their dwelling or do shopping; as home helps are available; cook substantial meals, as meals on wheels or luncheon clubs can be provided; take a bath unaided, as bath attendants can call.

In contrast, tenants with mental disabilities, especially senile dementia, caused great problems for they often upset other tenants and were a danger to themselves. Tenants who wandered out at night were particularly difficult. This was because the other tenants, neighbours or the police would call the warden out to put such tenants back to bed. In other cases, confused tenants accuse the warden of stealing or lying (causing great distress) or they could not remember the warden's rest days and keep calling at her door for trivial issues. Not many tenants suffered from mental problem but when they did it often affected their ability to care for themselves and sheltered housing does not appear to be suitable for any but the mildest cases, unless there is a spouse or very helpful relative willing to provide special care.

The tenants were very well supported by health and local authority services but this would appear to be due to the general high provision of services for the elderly in Durham rather than due to the special needs of sheltered housing tenants. *

* Durham County has the highest net expenditure, per 1000 population, for domestic help of the thirty-nine English non-metropolitan Counties; the highest net expenditure, per 1000 population aged 65 and over, for main meals (meals on wheels and luncheon clubs), and the fourth highest net expenditure, per 1000 population aged 65 and over, on old people's hostels. (Personal Social Services Statistics 1975-76.) / ^{Approximately} two thirds of the County Social Services Department's budget ^{appears to be} spent on care of the elderly. (Durham County Council Social Services Department, Position Statement 1976.)

There are also 910 Geriatric beds provided by the National Health Service giving 11.2 beds per 1000 elderly population compared with the average of 8.6 for England and Wales. (Northern Region Health Authority Statagic Plan 1977-1986, January 1977.) There are also 100 day centre places for elderly people and a large number of voluntary organizations providing services, varying from Christmas hampers and social visiting through to almost complete warden service.

A considerable number of tenants had home helps to clean their homes, collect shopping and provide company. The County Home Help Organizer estimated the mode number of hours for elderly people in sheltered housing receiving home helps was four hours a week and she felt they received no more help than other elderly people with similar characteristics living in independent housing. However, she did comment that the provision of central heating in sheltered housing, compared with open fires in many independent homes (Durham is a mining area), often saved a home help up to half an hour's work per day as there were no grates to be cleaned or coal brought in.

Jones (1976) however, made a study of domiciliary provision and found people in sheltered housing were twice as likely to receive home helps and meals on wheels as similar people living in the community. He felt this was partly due to the type of person who moves into such schemes, perhaps people who find it easier to accept necessary help, and the presence of a warden who sees it as her role to call in services as soon as these become necessary. She also has the added incentive of seeking help for her tenants as the provision of a home help reduces the pressures on her when tenants are ill and unable to manage with their domestic arrangements.

Meals on wheels were provided for a number of elderly people and a few schemes had luncheon clubs open to any elderly person in the locality who wished to attend. Very few tenants received help from a bath attendant but in many schemes chiropody sessions were held on a regular basis in the hall or a nearby hall.

General Practitioners and district nurses were particularly praised by wardens for the care they provided. Very few social workers called but this may be sensible as the warden acts as a form of social worker and can call in the professional social workers as required.

Nearly all the tenants had relatives who visited frequently and provided care when they were ill. Many wardens said they had to "bully" some relatives to provide care. In some cases this was because relatives felt the warden should provide all the support required, but in others, the wardens were encouraging relatives to give care which they could not otherwise provide.

Tenants infrequently visited each other's homes, although in most schemes a number of tenants gave support and help to some of those who were ill. It should be noted however, that it was people with certain personalities who gave the help and not necessarily the younger tenants.

When the wardens were asked if it was difficult to get places for tenants in old people's hostels the answers varied greatly. Whilst pressure on places from the community as a whole influenced the ease with which places were offered, much also depended on the perceptions of the role of sheltered housing held by those allocating vacancies. In some cases the wardens said that their word was normally accepted as being the best guide to the need for a place. Other wardens said that it was extremely difficult to obtain places, because some people believed that wardens were there to provide a high level of personal assistance and tenants could be taken into hostels or hospital later (and discharged earlier) than elderly people living in independent dwellings.

In addition, nearly all wardens had had the occasional tenant who should have been transferred to a hostel but refused to go. Since people in sheltered housing have the normal rights of tenants they cannot be forced to leave their home unless a compulsory order is made under Part IV, Section 47 of the 1948 National Assistance Act.

This puts a strain on the warden for she does not want the tenant in question, or other tenants, to think she is being cruel requesting or supporting a compulsory transfer and yet if the tenant remains, a great physical and mental burden may be placed on her.

A number of studies have been made of the characteristics of tenants in various schemes but the findings are not reproduced here as insufficient accompanying data was available on the competition for places, the standard of alternative housing for elderly people, and the level of other support services, especially old people's hostels.

Two major factors do however appear to emerge about tenants in sheltered housing. The first is that the level of provision of sheltered housing in a district is a major determinant of the type of person in each scheme. In districts with high provision there are many fit, "young" tenants making few demands on wardens, whereas in districts with very low provision, tenancies will be given to the most needy and hence tenants have a high average age, there are more tenants who are physically frail and more demands are made on wardens.

Secondly, the level of domesticiliary, hostel and hospital services available to tenants also has a strong effect on the demands tenants make on wardens. If the provision of these services is low, unsuitable tenants remain in schemes as there are no beds to which they can be transferred and lack of home helps increases the amount of time wardens must spend visiting, tidying beds and shopping.

The researcher spoke to a number of tenants in their homes and found that, almost without exception, they were extremely happy to be in their particular scheme and had nothing but praise for the concept of sheltered housing. Although many had lived in poor housing prior to moving into sheltered housing, most dwellings were beautifully decorated and furnished and much care obviously went into making the rooms attractive and homely. One warden nicely summed up the state of most tenant's dwellings by describing them as "little palaces".

The tenants had many advantages over many other elderly people in that well designed modern accommodation was provided, rents were low, heating was often subsidized and they received a number of services, especially laundry, warden service and social events at no extra cost to themselves. Although many tenants were on supplementary pensions, many wardens commented that the majority of tenants said they had never been so well off and got angry when they heard people, especially on television, saying how badly off all old age pensioners are.

Sheltered housing appears to be popular with existing tenants and surveys in County Durham, details of which are given on pages 79 and 80 suggest there are many more elderly people wishing to have the advantages of the service. This popularity is in marked contrast to old people's hostels which appear to be greatly feared by the majority of elderly people.

ALLOCATION OF TENANCIES

Each district had its own system of allocating tenancies to elderly people. One used a predetermined points scheme which took account of lack of basic amenities, sharing rooms or amenities, structural defects and state of repair, security of tenure, overcrowding, multiple occupancy, disability and ill health, and time on the waiting list. In another district the points were based on only two criteria; the number of years the applicant had lived in the area (up to a maximum of twenty points) and the number of years over the age of sixty-five. In this district, priority was therefore given to a sixty-six year old who had lived in the district all his life over an eighty-five year old who had only just moved into the district, perhaps to be near younger relatives. In another district tenancies were always given to the oldest person on the waiting list. In most of these points schemes, those people with medical priority could be put near the top of the list. In other districts, the needs of each applicant were individually assessed and tenancies given to the people whose need appeared to be greatest. It was usually the district councillors who made the decision in these cases. The County Social Services Department had no say in the allocation of tenancies, although requests from the Department were sympathetically considered.

Only some districts considered owner occupiers and elderly people living outside the area for tenancies although the Cullingworth Report (1969) recommended no-one should be precluded from applying for, or being considered for, a council tenancy on any grounds whatsoever.

Two of the districts with a high level of provision for sheltered housing occasionally gave bungalows to elderly people living with an unmarried daughter or son, especially where the elderly person was left alone all day. In these cases the child gave an undertaking to leave the bungalow and move to another council dwelling when the elderly person died.

Housing authorities have little influence over the movement of tenants out of schemes and hence the demands made on wardens by tenants who become frail and in need of much support. However, authorities can influence the level of work for wardens by regulating the distribution of vacant tenancies.

Many reports on sheltered housing write of the need to balance the number of fit tenants with frail tenants in order to provide a reasonable workload for the warden, to create a lively atmosphere in the scheme and for some active tenants to be available to assist the more frail. This balance naturally occurs in areas with high provision but may be hard to organize in areas with low provision, as it takes a courageous person to give a tenancy to a fit elderly person when there are more deserving cases on the waiting list.

If only those in reasonable health are admitted to schemes, consideration has to be given to what happens to the relatively frail who do not require a place in an old person's hostel and are, in many ways, the ideal candidates for sheltered housing. There are various ways of coping with this dilemma. For example, the most needy cases can be provided with sheltered housing but in the few cases where this creates a very heavy workload for wardens, extra staff could be employed: such as two wardens each working a five-day week.

Alternatively, the most needy tenants could be accepted and provided with much community support, and the warden left to spend her time to the best advantage although accepting that she cannot provide much nursing and supportive care or organize many social activities. This could be justified in that it is better to provide some cover for those in the most need rather than to fill places with people who do not need the service and leave many needy people unassisted in the community.

Another solution to the dilemma is to increase the number of sheltered housing dwellings, perhaps by converting existing elderly people's bungalows, in order that places are made available for many elderly people and not just those who are very frail.

The time spent on the waiting list varied greatly from place to place. If applicants were in considerable need of such accommodation and willing to move anywhere in the district, most could obtain a place quickly, sometimes within weeks of applying for a tenancy. However, location was normally the most important criteria for applicants and the time on the list was related to the demand for places in each village.

In some popular locations it might take five years to obtain a place whereas in a couple of villages, places had been given to people in their late fifties as these could not be filled by older people. On the whole it was only the new schemes which were hard to fill for it was often difficult to find tenants for thirty dwellings in one village all at the same time.

The districts varied in the freedom they gave applicants to refuse offers of tenancies. In some, only a couple of refusals for dwellings in specified areas were allowed, whereas in others, applicants could stay at the top of the list until they were really wanting to move into sheltered housing. The latter policy reduced the number of people moving into sheltered housing early as an "insurance policy" but led to inflated waiting lists which were then used as a justification for more schemes being built.

Applicants

Though most applications knew approximately how long they would have to wait for a tenancy they usually had only a few days in which to decide whether to accept a firm offer. When the accommodation was not quite what they wanted, perhaps in the wrong scheme, a bedsitter or on the first floor; they had very little time in which to make a decision. Once an offer was accepted most tenants moved in within a week, because after this period they were responsible for the rent of the new dwelling and most could not afford two rent commitments. No comment was made to the researcher concerning the shortness of notice, but there must have been some panic as surplus furniture was quickly disposed of and new carpets and curtains for the new dwelling were organized. Only a few districts redecorated accommodation for incoming tenants and yet there was not time for new tenants to organize redecoration before moving in, even if they could afford it.

could

Chapter 4C O S T S O F L O C A L A U T H O R I T Y S H E L T E R E D
H O U S I N G

District Councils varied considerably in their analysis of the capital and current costs of their sheltered housing schemes and great difficulty was experienced by the researcher in obtaining comprehensive costs. Most of the Districts had some form of detailed breakdown of the direct running costs of schemes, but tended to have no records of the loan charges, management or maintenance costs of individual schemes. Details of capital costs were more readily available but few Districts included planning, administrative costs, or professional fees, or the cost of land. However, in a few cases the cost of proposed schemes of development had not been worked out for Committees, even in approximate form, before schemes were approved (although the architects would, of course, have to keep the cost within the strict financial limits laid down by the Department of the Environment).

There would appear to be no guides available to use to compare the costs of the varying sized blocks of dwellings, the facilities and services that can be provided, and the different mixes of bungalows, bedsitters, and one-bedroom or two-bedroom flats. This chapter provides some of these comparative costs as models of capital and current costs have been developed to illustrate the costs of any proposed sheltered housing dwelling. Where the dwelling is occupied by one person this also represents the cost per person. Despite the high current rate of inflation which puts all monetary figures quickly out of date, the costs, all as at March 1976, are not thought likely to change materially in percentage terms, as between one class and another, in the next few years.

CAPITAL COSTS

The prior approval of the Department of the Environment is necessary for all sheltered housing schemes requiring Central Government support. Approval will only be granted if the cost of the scheme comes within the limits of the combined 'yardstick' and allowances, plus a maximum of ten percent extra to take account of any excess costs on basic items resulting from high tenders and for "enhanced standards". Following such approval, the Department of the Environment will pay sixty-six per cent of the annual loan charge incurred on the basic allowances, but the local authority must finance any additional expenditure from its own resources.

The capital costs shown in this chapter are calculated as follows:-

Basic Yardstick

The Department of the Environment's 'cost yardstick' is based on the average number of persons per dwelling and per hectare covered and is expressed as the cost per person that is allowable for super-structure, substructure and external works. Tables of such costs are set of the the Department of the Environment Circular 61/75.

Small Dwelling Allowance

An extra allowance of up to £250 per dwelling may be made for small dwellings, with up to three persons, to offset the higher relative cost of such dwellings.

Category I bungalow schemes

All accommodation designed specifically for elderly people must incorporate certain design features, such as handrails in the bathroom. An allowance of £450 per two or three person dwelling covers the cost of the mandatory features and encourages the inclusion of other beneficial design features. An extra £50 per dwelling is available for the provision of an alarm system.

Where communal facilities are provided £2500 per scheme plus £75 per person is allowable. The allowances per person are based on the maximum number of persons who could be housed rather than the number actually likely to live in the scheme. Where a guest bedroom is provided an allowance of £1000 is made.

Category II blocks of flats and bedsitters

Allowances of £10,000 per scheme plus £1000 per one person dwelling and £1100 per two or three person dwelling are available to cover the cost of providing safety features in each dwelling and for communal facilities. Also available are extra allowances of £1000 for a guest room and £500 for a warden's office.

Regional Variations

Building costs vary according to region and may justify certain percentage increases on the cost yardstick. As at March 1976 the Northern Region enjoyed the lowest building costs, and was allowed six per cent above the basic yardstick for its firm-price contracts. By comparison the regional allowance for some inner London areas were forty-eight per cent extra for firm price contracts.

Exceptional Costs Allowance

Unusual costs relating to particular sites may be allowable for subsidy, for example, where a site is not level and requires special design features to make it suitable for people who have difficulty using stairs. The Department of the Environment Northern Region Chief Quantity Surveyor estimated such costs averaged an additional three per cent.

Uplift

The cost yardstick allowances are reviewed regularly to take account of the increased costs of labour and materials. The uplift at March 1976 was five per cent.

Enhanced Standards

The provision of slightly higher standards by a Local Authority may be approved by the Department of the Environment, but must come within the ten per cent of the allowable costs. The Northern Region Chief Quantity Surveyor believed that the average increase for enhanced standards was around three per cent, though Districts varied greatly in their practice regarding this option.

Car Accommodation and Site Development Costs

These costs vary greatly for each scheme and the costs are not part of the cost yardstick but approved individually by the Regional Office of the Department of the Environment. The figures shown are based on estimates by the Regional Chief Quantity Surveyor.

Professional Fees

The fees of architects, quantity surveyors, and legal surveyors vary according to the type of scheme and the amount of repetitive design, but are here averaged out at eleven per cent as a reasonable figure if the work is carried out by independent consultants. In practice the work is often carried out by the Authorities' own professional staff.

Land

The price of land for each scheme varies greatly between different locations, the shape of the site, the permissible densities of building and the date at which it is purchased by the local authority. The sum of £20,000 per hectare was recommended to the researcher as a reasonable figure for the cost of land in a fairly central location in a small Durham village.

Administrative Costs

This cost should take account of the time council employees spend developing new schemes. No costings were available from local authorities but the figure of one point five per cent is used as this is the figure the Department of the Environment allows for this purpose when Housing Associations apply for grants (Department of the Environment Circular 68/76).

Capitalized Interest on Advances

Loan charges incurred in the development and building of a scheme are usually capitalized. Five per cent is used in the model as this is the rule of thumb recommended by the Housing Corporation (Note 11 of the Housing Corporation's form "Application for scheme approval", undated).

Furnishings

These costs are not subject to any limits by the Department of the Environment, and Districts vary in the quality of furnishings provided. The costs in the model are based on average costs incurred by Districts.

Warden's Dwelling

It can be argued the cost of the warden's dwelling should be excluded from the total cost of a scheme as it provides an extra unit of accommodation. On the other hand the warden's dwelling is part of the service provision of the scheme and a proportion of the cost of her dwelling should be added to that of each tenant's dwelling. This is particularly the case when the warden comes from outside the area or was not formerly a council tenant. The latter argument has been adopted here and prices are just over three per cent dearer than if the former argument was adopted.

Other Allowances

Where mobility or wheelchair housing (see page 42) is provided there are extra allowances available. No account is taken of these in the model as they are rarely taken up by local authorities.

Types of Scheme Costed

The costs of three different forms of sheltered housing were calculated.

- (a) Category II blocks incorporating alarm system, communal facilities, warden's accommodation and office and a guest room. The costs of one person flatlets and two person, one bedroom, flats are shown.

- (b) Category I bungalows with communal facilities adjacent, a warden's dwelling and an alarm system. The costs of one and two bedroom dwellings are shown.
- (c) Category I bungalows with no communal facilities but including a warden's dwelling and an alarm system. Again costings are shown for both one and two bedroom accommodation.

Table 5 shows the capital cost, to the nearest £100, of providing each type of sheltered housing scheme, each consisting of thirty dwellings for elderly people. All costs are those applicable as at March 1976.

Table 5

Capital Costs of Sheltered Housing Schemes for Thirty Dwellings (in £1000s)

Type of Dwelling	Category 2 Flats		Category 2 Bungalows			
	Max. Facilities		Max. Facilities		Alarm & Warden	
	Bed-sitter	1 Bed-room	1 Bed-room	2 Bed-room	1 Bed-room	2 Bed-room
Basic Cost (D.O.E. Yardstick)	£ 151.3	£ 171.3	£ 158.9	£ 177.6	£ 158.9	£ 177.6
Small Dwelling Allowance	7.5	7.5	7.5	7.5	7.5	7.5
<u>Category 1 Allowances</u>						
£450 per dwelling			13.5	13.5	13.5	13.5
£50 per dwelling for alarm			1.5	1.5	1.5	1.5
£2500 per scheme plus £75 per person			7.4	10.3		
£1000 per scheme guest room			1.0	1.0		
<u>Category 2 Allowances</u>						
£10000 per scheme facilities	10.0	10.0				
£1000 per 1 person dwelling	30.0					
£1100 per 2/3 person dwelling		33.0				
£1000 per scheme guest room	1.0	1.0				
£500 per scheme warden's office	0.5	0.5				
General Cost A	200.3	223.3	189.8	211.4	181.4	200.1
Regional Variation 6% of A						
Exceptional Costs 3% of A						
Uplift 5% of A						
Enhanced Standards 3% of A						
	<u>17% of A</u>					
	34.1	38.0	32.2	35.8	30.8	34.0
Accommodation for Car	2.0	2.2	3.0	3.0	3.0	3.0
Site Development Cost	20.0	22.0	50.0	55.0	45.0	50.0
Cost with Extras B	256.4	285.5	275.0	305.2	260.2	287.1
Professional Fees 11% of B	28.2	31.4	30.2	33.5	28.6	31.6
Land Cost	4.6	8.6	11.6	16.6	10.8	15.8
Cost with Fees, Land C	289.2	325.5	316.8	355.3	299.6	334.5
Administration 1.5% of C	4.3	4.9	4.7	5.3	4.5	5.0
Capitalized Interest on Advances 5% of C	14.5	16.3	15.8	17.7	15.0	16.7
Furnishings to Communal Areas	4.8	6.0	1.0	1.2		
Capital Cost per Scheme	312.8	352.7	338.3	379.5	319.1	356.2
Capital Cost per Dwelling	10.4	11.8	11.3	12.6	10.6	11.9
Weekly Loan Charge at 14% over 60 years (see table 6) to nearest 10p	£28.00	£31.80	£30.50	£34.00	£28.60	£32.10

The Capital Cost of a scheme (including the capitalised interest charges incurred during development) is normally repaid over sixty years. The annual loan charge includes this repayment with interest on the reducing balance outstanding. The total charge (as with most mortgage interest and repayment charges) is averaged out so as to make a fixed payment annually over the period. The cost is strongly influenced by the rate of interest at which the District borrows money. During 1975/6 the Public Works Loans Board lending rates were around fourteen per cent (a very high rate) although Districts may have been able to obtain money from other sources at a more favourable rate. Table 6 shows the annual loan charge of the three major forms of sheltered housing at interest rates of six per cent, ten per cent and fourteen per cent over sixty years in order that the effect of changed interest rates can be seen. It may be noted that the effective cost of repayment and interest on the reducing balance when averaged out accords closely with the interest rate as applied to the whole account.

Table 6

Annual Loan Charges on One Bedroom Sheltered Housing Dwellings at Varying Rates of Interest Over Sixty Years

<u>Rate of Interest</u>		<u>Six Per Cent</u>	<u>Ten Per Cent</u>	<u>Fourteen Per Cent</u>
Loan charge per £1000 per annum		£61.92	£100.44	£140.16
	£	£	£	£
Flat in block	11,800	731	1,185	1,654
Bungalow with maximum facilities	11,300	700	1,135	1,584
Bungalow with alarm and warden only	10,600	656	1,065	1,484

Whilst local authorities have no control over interest rates generally, they can, in theory, choose the period of time over which their loans are repaid. Housing departments normally prefer to repay loans over sixty years even though it might be advantageous for them to repay over a shorter period. The annual cost to the ratepayers is naturally lower for long term loans, but the total cost will be much higher, as will be seen in the table given below. Current ratepayers therefore benefit at the expense of future ratepayers, the latter having to pay interest on loans which, for a small additional payment, could have been repaid many years earlier. This argument, however, is negatived and positively outweighed during a period of high inflation, when the real value of the money required for interest and repayment is correspondingly reduced. The factor of inflation will also materially affect the rate of interest charged, for both will presumably rise together. Large scale borrowing is increasingly a complex subject but it is interesting to compare the borrowing of housing departments with the County's Social Services Department. Durham County Council's policy on capital expenditure for old people's hostels is either to write it off completely in the first year or pay it off over a very short period.

Table 7

Total Loan Charges on a Flat in a Block Costing £11800 Over Twenty, Forty and Sixty Years Where the Rate of Interest is Fourteen Per Cent

<u>Period of Repayment</u>	<u>Loan Charge</u>	<u>Loan Charge per Annum</u>	<u>Total Paid</u>
	£	£	£
Twenty years	150.98	1,782	35,631
Forty years	140.74	1,661	66,429
Sixty years	140.16	1,654	99,233

CURRENT COSTS

The Treasurer's Department of the Local Authorities visited were very helpful in providing information concerning running costs, and although the data obtained varied as to the way in which it was presented and in its detail, it was possible to develop a model to show the typical running costs of varying types and sizes of sheltered housing. The costs are itemised in the Table under the following headings.

Warden's Salary

This is based on the rates for 'Wardens of Aged Persons' Dwellings' agreed by the National Joint Council for Local Authority Services at March 1976. It varies according to the number of dwellings covered and the duties performed. There are two basic rates, one for wardens doing only "Good Neighbour" duties and the other for wardens undertaking a fuller range of duties. Wardens of bungalows schemes where maximum facilities are provided could come under either category, but it was decided to class them as undertaking the full range of duties (including some cleaning of communal areas) and allow no extra money for cleaners. In practice for schemes of exactly thirty dwellings wardens of both types get the same basic salary.

The employer's superannuation contributions were taken to be five per cent of the warden's salary, less sixpence per week, multiplied by a factor of 1.3. The employer's contribution to National Insurance is at the rate of 8.5% of the basic salary.

Relief Warden's Salary

This varies but is assessed as being sixteen hours per week at 95p per hour.

Cleaners' Salaries

These are taken as being 75p per hour and allow for 15 hours a week for a thirty dwelling block, 20 hours for a forty dwelling block, and 25 hours for a fifty dwelling block.

Cleaning Materials, Window Cleaning, Telephone, Insurance, Garden Maintenance and Television Rental

These costs are based on the average of all Districts.

Heating, Lighting and Power for Communal Areas

These costs vary greatly according to the design of the building and the type of fuel used. The figures in the table are fairly typical of the costs incurred by schemes in Durham. In some districts the wardens are given an allowance, in addition to their salary, to cover the cost of extra heat and lighting to their home incurred as a result of their work. No separate item is shown for this in the table, these amounts being covered by general heating and lighting costs.

Telephone Rental

This includes the cost of provision for the warden, the relief warden, and an extension to the warden's office in the blocks.

Depreciation of Furnishings

The cost of furnishings, laundry equipment and garden tools is written off over ten years.

Maintenance

The cost of maintenance on a new building should be small though money should be set aside for cyclical repairs. The amount of maintenance needed will be affected by the design of the building and the materials used in construction but the figure used in the model is the one allowed to Housing Associations for this purpose when they make application for grants from the Department of the Environment.

(Department of the Environment Circular 68/76.) *

Management

The management cost of time spent by council staff on sheltered housing is not recorded separately by local authorities. Moreover the cost will vary according to the amount of time spent allocating tenancies, visiting schemes and providing support and training for wardens. The figure in the model is based on the Department of the Environment's allowances to Housing Associations for this purpose.

(Department of the Environment Circular 68/76.) *

General and Water Rates

These are generally averaged and passed on to the tenants as additions to the individual rents. They are therefore not included in the table below.

Miscellaneous Costs and Income

Miscellaneous costs such as those incurred laundering the guest room linen and the rental of the tenants' call box have been ignored as, on the whole, they are offset by income such as that obtained from the letting of the guest room and refunds on tenants' telephone calls.

*An alternative approach would have been to take the average costs of management and maintenance for all council housing in England and Wales. The costs would then have been a little lower. (Housing Policy, Technical Volume, Part I, Department of the Environment 1977)

Table 8

Current Cost per annum of Sheltered Housing Schemes for Thirty Dwellings

Type of Dwelling	Category 2 Flats		Category 1 Bungalows			
	Max. Facilities		Max. Facilities		Alarm & Warden	
	Bed-sitter £	1 Bed-room £	1 Bed-room £	2 Bed-room £	1 Bed-room £	2 Bed-room £
Warden's Salary	1981	1981	1981	1981	1981	1981
Warden's Superannuation and Nat. Insurance	293	293	293	293	293	293
Relief Warden's Salary	790	790	790	790	790	790
Relief Warden's Nat. Insurance	67	67	67	67	67	67
Cleaner's Salary	585	585				
Cleaner's Nat. Insurance	50	50				
Cleaning Materials	50	50	15	15		
Heating, Lighting, Power to Communal Areas	1000	1000	400	400		
Window Cleaning	60	60	30	30		
Telephone Rental	79	79	72	72	72	72
Telephone Calls	36	36	36	36	36	36
Insurance	25	27	25	25	24	24
Depreciation of Furniture etc.	480	600	100	100		
Maintenance	2100	2250	2250	2550	2250	2550
Management	1950	1950	1950	1950	1950	1950
Garden Maintenance	300	300				
Television Rental	80	80	80	80		
Current Cost per Scheme per annum	9926	10198	8089	8389	7463	7763
Current Cost per Dwelling per annum	331	340	270	280	249	259
Current Cost per Dwelling per Week to nearest 10p	6.40	6.50	5.20	5.40	4.80	5.00

COMPARATIVE COSTS OF TYPES OF SHELTERED HOUSING

Table 9 summarises the costs and income of the most commonly provided forms of sheltered housing. In order to help decision-makers the percentage cost of each form is given compared with the most conventional type, which is that of a one-bedroom flat in a block. The costs shown are based on a block or group of thirty dwellings.

Table 9

Summary of Weekly Costs per Dwelling of Sheltered Housing Schemes for Thirty Dwellings

	<u>Category 2 Flats</u>		<u>Category 1 Bungalows</u>			
	<u>Max. Facilities</u> <u>Bed-</u> <u>sitter</u> <u>£</u>	<u>1 Bed-</u> <u>room</u> <u>£</u>	<u>Max. Facilities</u> <u>1 Bed-</u> <u>room</u> <u>£</u>	<u>2 Bed-</u> <u>room</u> <u>£</u>	<u>Alarm & Warden</u> <u>1 Bed-</u> <u>room</u> <u>£</u>	<u>2 Bed-</u> <u>room</u> <u>£</u>
Capital Cost	10400	11800	11300	12600	10600	11900
Loan charge per week	28.00	31.80	30.50	34.00	28.60	32.10
Current cost per week	6.40	6.50	5.20	5.40	4.80	5.00
	34.40	38.30	35.70	39.40	33.40	37.10
Less rent paid by tenant	3.50	4.00	4.00	4.50	4.00	4.50
Net cost per week to nearest 10p	30.90	34.30	31.70	34.90	29.40	32.60
% cost as compared with 1 Bedroom flat in block	90.1	100.0	92.4	101.7	85.7	95.0

The table shows that the costs of providing sheltered housing can vary from £29.40 per week for a one-bedroom bungalow with alarm and warden to £34.90 for a two-bedroom bungalow with all facilities. It is plain that the provision of maximum facilities, however desirable, must be at the cost of reducing the number of dwellings provided for a given total expenditure.

Bedsitters are eleven per cent cheaper to provide than one-bedroom flats but five per cent more expensive than one-bedroom bungalows with alarm and warden. In view of the increasing unpopularity of bedsitters and the greater flexibility of one-bedroom flats and bungalows for either single people or couples, bedsitters may not be a good choice of accommodation.

Two-bedroom accommodation is naturally more expensive to provide than one-bedroom. In the case of bungalows the increase is around ten per cent. It is probably unwarranted for all but a few tenants, especially if a guest bedroom is provided somewhere in the scheme to accommodate a visiting relative. It is reasonable, however, to provide a few two-bedroom dwellings in every scheme for tenants needing two bedrooms, perhaps for medical reasons. The provision of a second bedroom is discussed further on page 194.

Communal facilities cost approximately seven per cent extra to provide. Put another way thirty two dwellings could be provided, without communal facilities, for the price of thirty dwellings with them. In areas, therefore, where good local community amenities for elderly people are already available within easy reach of a proposed scheme, funds are perhaps best spent providing the maximum number of dwellings with only an alarm and warden, for the latter seems to play the most important part in the success of sheltered housing.

Moreover, further communal facilities can always be added later if funds permit.

Economies of Scale

The savings in costs to be expected with the increasing size of schemes are shown in Table 1. 10, for those involving thirty, forty and fifty dwellings.

Table 10

Comparative Costs of Sheltered Housing Schemes comprising Thirty, Forty and Fifty One-bedroom Dwellings

Type of Scheme	Flat in Block Max. Facilities			Bungalow Max. Facilities			Bungalow Alarm & Warden		
	30	40	50	30	40	50	30	40	50
Number of Dwellings	30	40	50	30	40	50	30	40	50
	£	£	£	£	£	£	£	£	£
Loan charge per week	31.80	30.50	29.90	30.50	29.40	28.60	28.60	27.80	27.20
Current costs per week	6.50	5.90	5.60	5.20	4.70	4.40	4.80	4.30	4.00
	38.30	36.40	35.50	35.70	34.10	33.00	33.40	32.10	31.20
Less rent paid by tenant	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00
Net Cost per week to nearest 10p	34.30	32.40	31.50	31.70	30.10	29.00	29.40	28.10	27.20
% Cost as compared with standard (30 dwellings)	100.0	94.5	91.8	100.0	95.0	91.5	100.0	95.6	92.5
No. of dwellings obtained from cost of standard (30 dwellings)	30.0	31.8	32.7	30.0	31.6	32.8	30.0	31.4	32.4

Although blocks or groups of thirty dwellings might be considered the ideal size, savings of around five per cent can be made if forty-unit schemes are chosen, and eight per cent for fifty-unit schemes.

Such savings can be used either to provide more dwellings or more facilities for those built. Increasing the number of bungalows in a group from thirty to fifty, for example, would almost enable communal facilities to be provided for those who would otherwise have had just an alarm and warden or a one-bedroom flat instead of a bedsitter.

Even greater savings than those shown in the tables are possible, for it has been found in practice that, in areas where many places in sheltered housing are available, as many as seventy to eighty bungalows can be looked after by a single warden and relief warden. This is due to the fact that a high proportion of the tenants will be fit and active and make few demands on the warden. However, against any suggestion of larger schemes must be set the danger of a more 'institutionalised' atmosphere, and the possibility of tenants being cut off from local community involvement. The size of schemes is discussed further on page 195.

FINANCE FOR SHELTERED HOUSING

All tenants in sheltered housing obtain subsidies on their rents. Subsidies are provided by the local authority, the Department of the Environment and the Department of Health and Social Security. Details of the way costs are shared are given below.

Rents

The District Housing Departments charge rents, exclusive of general and water rates, of around £4 per week on sheltered housing dwellings. This constitutes just over ten per cent of the capital and running costs. The rents are set by the District housing committees and in all cases are identical to those charged for similar accommodation without communal facilities or a warden, that is, no extra rent is charged for the "service" element of sheltered housing.

Tenants are eligible for rent rebates and those in receipt of supplementary pensions receive a rent allowance within that pension.

Rent Pool

Rents in any one local authority area can be averaged so that the rents on older properties, on which loans have been repaid, help finance the cost of new dwellings. The difference, however, is not considerable, due to the high cost of repairing and modernising the older dwellings. In general it is felt that the burden of subsidising sheltered housing should not fall unduly on other council housing tenants, but on the ratepayers as a whole, both private and commercial.

Rates

Part of the Districts' rate income is used to subsidize sheltered housing dwellings where there is a deficit in the housing revenue account.

County Grants

Prior to April 1973 the Durham County Council made grants to District Councils towards the cost of housing for the elderly.

Ten pounds per annum was paid for each dwelling provided (irrespective of whether welfare facilities were provided) and up to sixty pounds per annum towards the cost of communal facilities, alarm systems and warden. The amount paid was related to actual expenditure.

The 1972 Housing Finance Act made this payment undesirable (from the County's point of view) for if they paid grants to Districts that had a surplus in their housing revenue account the County in effect paid the money to the central government funds. This was due to the fact that (subject to up to fifty per cent being refunded to the Council's General Rate Fund if no rent allowances were received) the District surplus was handed on to the Government. In the other Districts contributions from the County only reduced the level of central government subsidy. The payments were therefore stopped.

However, the 1975 Housing Rents and Subsidies Act repealed part of the 1972 Housing Finance Act and some grants could be made to Districts without "subsidizing" central government funds. Counties may now give grants to Districts in order to encourage the provision of sheltered housing if they believe that this will lead to a reduced call on other county services, such as home helps and old people's hostels. As Districts have a housing responsibility and counties are concerned with welfare, it would appear logical in some ways for counties to contribute to the welfare costs of sheltered housing.

Following the 1975 Act Durham County Council wrote to all county councils in England and Wales asking them if they made grants to Districts for elderly person's accommodation.

Of the fifty-eight councils that replied thirty-two made grants (though four were considering discontinuing them) and twenty-six did not (though fifteen were considering doing so). Of the thirty-two making grants twenty-four based their payments on the cost of the services provided, but often with a fixed maximum. The rest provided a set amount per dwelling.

Central Government Grants

The Department of the Environment makes a grant of sixty-six per cent towards the loan charges incurred on ^{admissible items for} approved sheltered housing schemes. This means that around fifty-five per cent of the combined capital and running costs is paid for by the Treasury. In addition there are other subsidies provided by central government to local authorities, which may indirectly assist expenditure on sheltered housing, for example rate support grants and special elements subsidies.

Savings/Additional Expenditure Incurred as a Result of New Tenant Vacating Another Dwelling

Many tenants who move into sheltered housing vacate a local authority family house and account should be taken of this when costings are being considered. The capital and current costs of a three-bedroomed family house were therefore calculated using the same method as that for sheltered housing. The capital cost of the family house is taken to be £12600 and the net weekly cost £31.80. (Further details of these costings are on page 131.) The differences in costs when tenants move from a family house into various forms of sheltered housing are shown in Table 11 below.

Table 11Difference in Costs of Providing a Three Bedroom Family House with Net Weekly Cost of £31.80 compared with Various Forms of Sheltered Housing

	<u>Weekly Net Cost</u>	<u>Difference in Cost Compared with Family House</u>
	£	£
Bungalow with alarm and warden, one bedroom	29.40	- 2.40
Bedsitter in block	30.90	- 0.90
Bungalow with maximum facilities, one bedroom	31.70	- 0.10
Bungalow with alarm and warden, two bedrooms	32.60	+ 0.80
Flat in block	34.30	+ 2.50
Bungalow with maximum facilities, two bedrooms	34.90	+ 3.10

The table shows that, contrary to popular belief, there are no great financial savings to be made when tenants are transferred from family houses into sheltered housing, in fact flats in blocks and two bedroom bungalows are more expensive to provide. However, account must be taken of the advantage of gaining suitable accommodation for elderly people and the provision of a welfare service for virtually the same cost as a family house.

Where one bedroom bungalow schemes are concerned it is more cheap to provide sheltered housing and it may be sensible for local authorities to provide as many of this type of dwellings as is desired by tenants who are currently in local authority family housing. Assuming that the vacated houses are needed by other people the provision of sheltered housing increases the satisfaction with housing by elderly people, releases family houses for families and probably reduces the demands made on the County Social Services Department.

However, when an owner-occupier moves into sheltered housing, the majority of the net cost is additional expenditure on public funds, although the tenancy may be welcomed by the tenant as he obtains highly subsidized housing and his capital is freed to be spent or saved as he chooses. The money may be invested, used for new purchases, given to relatives or used to purchase an annuity. This financial gain is in great contrast to the provision of other health and welfare services where, although a service may be free or subsidised, the recipient does not become financially better off than someone who has not received the service.

In order to spread a service as widely as possible, most welfare services are means-tested. The home help service is charged at its full economic rate to those who can afford it and there is a sliding scale of charges according to the income and capital of the recipient. When elderly people are in a hostel they pay the average cost of such accommodation but there is a sliding scale of charges down to a minimum which leaves £2.65 for pocket money. The resident's state pension, occupation pension, private income and savings are taken into account when the charge is being calculated. A similar situation occurs where elderly people are in hospital for their state pension is reduced after they have been there six weeks and after a year they receive only £2.65 pocket money a week (unless they have dependants or a home to maintain). However, they can keep their other income and capital, and some of the state pension is refunded as a resettlement allowance, if they leave hospital again.

A disadvantage of providing highly subsidized housing to people who have a high level of capital is that it may mean the service can only be provided to a limited number of people, whereas if larger contributions are made by people who could afford the service, it could be provided for more people.

Mistakenly, some District Councillors view all existing owner-occupiers as wealthy people able to provide themselves with suitable accommodation, and do not allow them on council waiting lists or give them only low priority. This is unfortunate, for a large number of elderly owner-occupiers live in very old, poor quality housing, sometimes lacking damp courses, bathrooms and inside toilets and they cannot afford to purchase well designed flats or bungalows. It was due to these considerations that the Cullingworth Report on council housing (1969) recommended that no person should be precluded from applying for, or being considered for, a council tenancy because they were an owner-occupier.

One of the reasons why even very wealthy applicants need places in local authority sheltered housing is that the service cannot, with a few exceptions, be purchased in the private sector. Applicants can pay for private domestic help but there are no opportunities to purchase the services of a warden or an alarm system. District Councils might reduce the demands made on them if they gave encouragement to private builders to develop sheltered housing, especially if the Council undertook to provide, or organize the provision of, the service element in order to ensure there was continuity of support even if the builder sold out or went bankrupt. This latter suggestion is encouraged by the Department of the Environment in its Consultative Paper "Housing for Old People" (1976).

Who would pay for sheltered housing when the local authority provided good quality housing at a cheaper rate? This is a question which might be asked of all housing yet, in early 1976 fifty-five per cent of all dwellings were owner-occupied (Housing and Construction Statistics, First Quarter 1976). Private property is valued, as it provides a good investment against inflation, may provide a higher standard of accommodation, and pleasant location, and owners may gain satisfaction in knowing that they are living amongst neighbours of a similar background.

However, very few private sheltered housing dwellings have been built in England, partly due to lack of imagination and courage on the part of the builders and partly as there appears to be little demand for such housing by potential owner-occupiers. Only two fairly small organizations, Guardian Homes Ltd., and Retirement Homes Ltd., are known to provide such housing. Anchor Housing Association did consider building a private scheme in Darras Hall, Northumberland in 1976 but although the area had many elderly wealthy people there was insufficient demand to make it worthwhile building the scheme.

An alternative way of preventing unnecessary subsidies to wealthy applicants, would be for the local authority to make certain demands on owner-occupiers who wished sheltered housing. For example, applicants might be invited to give their house to the Council or pay a proportion of the capital realised on the sale, to the Council, either as a gift or as a loan which would be returned to them, or their relatives, if they left the scheme or died. Alternatively they could be charged a higher rent.

However, any such financial schemes needs to be carefully thought out in order to be equitable and to prevent fraud by people moving to a smaller house prior to applying for sheltered housing, or moving into rented accommodation or with relatives with the aim of avoiding charges.

Apart from encouraging private builders, it is unlikely that any of these ideas would be taken up, because there are strong feelings that thrifty people, who have saved to buy their houses in the past, should not be penalized in their old age. In any case any higher proportion of the cost of sheltered housing passed on to tenants would need to be related to the total income and capital of tenants, not just the value of their previous dwelling for there are some tenants who formerly lived in local authority or privately rented accommodation who also have some capital. In practice, rents for elderly people are unlikely to rise unless all local authority rents are raised for few people would like to see elderly people treated worse than younger tenants.

Even if sheltered housing rents were means-tested in some way, it is most unlikely that they would rise much, for tenants live in such housing for many years and should not have their savings depleted quickly, and there would be a need to relate rents to similar properties, such as elderly person's independent bungalows. There is, however, a case for adding a service charge to the basic rent of sheltered housing. This might be related to the level of services provided; it would be low when there was only a warden and an alarm system and a little higher where there were many communal facilities. A service charge would help reduce the cost of sheltered housing to public funds and is likely to be considered equitable to many people, especially elderly people who do not receive such a service. Service charges are made by some housing associations and appear to be acceptable, provided that the tenants who cannot afford the extra charge can claim the money by way of their rent allowances or supplementary pensions.

Chapter 5ALTERNATIVES TO GROUPE D SHELTERED
HOUSING SCHEMES

There are many elderly people who do not wish to live in sheltered housing. A survey conducted by Durham County Council in 1974 found 64% of the sample aged sixty-five and over, who lived alone, did not want to live in sheltered housing. The same question was asked in a survey, conducted by Darlington Housing Department, of all council housing tenants aged sixty-five and over: 81% said they did not wish this form of accommodation. However, it is possible that some of these people would benefit from selected aspects of sheltered housing provision.

Sheltered housing is expensive to provide and it may be morally wrong to provide a very high quality of service to some elderly people if there are others in the area lacking sufficient basic support services. Is it right to provide highly subsidized social activities, laundry and television for people already in receipt of good accommodation and a warden service, when a few pound spent on paying a visiting street warden might do much to brighten a lonely elderly person's day? Should there be some ceiling on the provision of sheltered housing, perhaps ten dwellings per hundred population aged sixty-five and over (in itself high provision), until all elderly people in the area have suitable accommodation? The provision of damp-free, easily heated dwellings with inside lavatories may go much further to keep elderly people in good health than the provision of alarm systems and wardens.

This chapter looks at the ways each of the three main aspects of sheltered housing (specially designed accommodation, alarm systems and personal assistance) can be provided for people not in formal sheltered housing schemes.

1. GOOD ACCOMMODATION

Well designed accommodation for old people is not the prerogative of sheltered housing schemes. Most elderly people can live happily in any dwelling which is well built and has basic amenities such as inside lavatory and bath, running hot water and a limited number of stairs. It is known that many people requesting sheltered housing desire good accommodation. At a more extreme level the whole concept of special housing for the elderly might be unnecessary if the standards of all housing were improved and safety features incorporated in all housing. Where there are minor design factors which cause problems for the very frail, the occupant or, in certain cases, the Social Services Department can install the aids which make it possible for the occupant to remain in the house. These can range from easily turned tap handles, bath seats and front door ramps to the installation of a chair lift or a downstairs toilet.

For many years small, well designed dwellings have been provided for elderly people and these are still popular. Some districts in County Durham have, however, converted all such dwellings into sheltered housing and intend to build no more independent dwellings.

This greatly reduces the freedom of elderly people who do not wish sheltered housing, for a variety of reasons, and they may remain in unsuitable accommodation until they feel psychologically ready for the idea that they "need" a warden to keep an eye on them.

It might be appropriate to build small houses or flats for people in their fifties and sixties and then install an alarm and arrange for a warden only when this becomes necessary. In addition to the convenience to the people who wish this form of housing before the age of sixty-five, larger properties are released earlier for use by families. Elderly people should not, however, be expected to keep moving from one home to another as their health deteriorates. Housing provided for the "young elderly" should also be suitable for the very frail.

Bungalows and flats, whether built by the local authority, housing societies or associations or private builders are the most normal form of accommodation but below are a few extra ideas about the provision of accommodation.

(a) Conversions of Large Properties into Several Flatlets

In most districts the greatest demand for housing came from elderly people wanting small accommodation rather than from families. Instead of building all new bungalows and flats some large properties could be converted into two or more dwellings.

The advantage of the conversions is that accommodation may be provided more cheaply, provided the property is in sound condition; elderly people may, in some cases, find it easier to remain in the area where they have always lived, and former neighbours or the other tenants in the converted house will often keep an eye on each other to ensure all is well.

If a flexible system of sheltered housing is introduced (see page 17) there is no reason why these dwellings should not be linked to a warden scheme when this becomes desirable.

Some housing associations and societies already convert large houses into old people's flatlets and in some cases a resident caretaker is employed and one of his or her functions is to keep an eye on the tenants.

(b) Improvements to Existing Properties

Where elderly people live in well located but poor quality accommodation, they may prefer their dwelling to be modernized and then continue living in the same dwelling.

(c) Granny Annexes

A few councils in England have built family houses with a small "granny annexe" adjacent. Elderly persons have their own separate dwelling but their family is next door so it is easy for them to meet and give mutual aid. Tinker (1976) made a study of 120 granny annexes and found their provision was appreciated by families who wanted their elderly relative(s) nearby, but not living with them, and by the elderly people who wanted to remain in the community near their family. There are, however, many problems associated with these schemes, especially problems of lettings when one of the parties dies or moves away but the other party does not wish to move.

At the time of her survey, Tinker found only a fifth of the annexes were occupied by people who were related to those in the family house.

(d) Flats with Caretakers

Where a number of elderly people live in a large block of flats, there may be a caretaker who either officially or unofficially performs many of the functions of a warden. In Newcastle-upon-Tyne (1976) a survey by the Social Services Department found 75% of elderly people living in high rise flats had a caretaker, and of these, 98% could be contacted in an emergency.

(e) Grouped Accommodation with Shared Facilities but no Warden

Some districts provide small communal halls for the use of people living in a group of elderly persons' bungalows. There is no warden, but the hall is cleaned and cared for by a part-time caretaker. The hall is used as a meeting place as well as for luncheon clubs and visits by a chiropodist. Since the tenants tend to know one another and spend much time looking out of their window, they usually keep an eye on each other.

To some extent this type of scheme covers the problem of being ill and being unable to contact someone, but puts a strain on neighbours or caretakers if they are expected to care for a very ill person where no relatives are available. There appears to be much neighbourliness in County Durham which should not be discouraged in any way, but it might be advantageous, if it were easier to get temporary help for a normal elderly person when they are taken ill suddenly.

In some Continental countries, large blocks of flats for elderly people are more common and as a result of their size many more facilities can be provided for tenants. For example, a block in Denmark with one hundred and eighty-two independent dwellings provides a shop selling everything essential for ordinary housekeeping, an infirmary which provides nursing care for mild cases, a restaurant, which will also deliver meals to tenants' dwellings, and a service desk manned twenty-four hours a day. The doorkeeper will receive and distribute parcels, run small errands and pay bills. All the tenants are provided with telephones in order that they can contact the service desk, community services or relatives in emergencies, and a social curator calls once a week on each tenant to check that they are well. (Beyer and Nierstroasz, 1967.)

(f) Housing Societies

In addition to building their own dwellings local authorities can encourage housing associations and societies to build in their area. Housing associations were discussed in chapter 7 and housing societies are similar but cannot borrow money from a local authority (although they can apply to the Housing Corporation) and they are not eligible for Exchequer^e subsidy or grant.

Some housing societies exist in the North East of England which convert large houses into independent flatlets or provide new flats and bungalows. In some of these schemes tenants are encouraged to help each other and the Abbeyfield Society provides a paid housekeeper who cooks two meals a day for tenants.

Abbeyfield charge about £20 a week to tenants and where necessary most of this charge can be recovered from the Supplementary Benefits Commission.

(g) Boarding Out

An alternative to building new or adapting old accommodation is to take advantage of underoccupation in existing accommodation by encouraging families to provide a room, and possibly meals, for one or more elderly people.

Where schemes exist in other parts of the country, potential host families offer their services; a boarding out officer or social worker visits the home to see if it is suitable and to find the type of lodger who would fit most easily into the home. The tenants then goes to stay, usually on a temporary basis, and if the arrangements are satisfactory the elderly person remains with the family.

2. ALARM SYSTEMS

There are a variety of ways in which elderly people living in independent dwellings can be provided with alarm systems. These are suitable for those elderly people who fear they might be taken ill and unable to contact anyone or who are afraid of burglars and vandals.

(a) Unsupervised Alarm Systems

Some of the District Councils have installed alarms in the homes of old people which, when triggered by a pullcord or button, activates a light and buzzer outside the front door. The aim here is to protect elderly people living alone, by giving them an easy way of informing the general public that assistance is required. The cost of these alarms is around £80 per dwelling. *

While this gives some protection the alarms are rather unsatisfactory where there are few passers-by and a call for help might go unattended for a long time. There are also criticisms that the light, with instructions on it such as "Emergency, please contact police" make the tenants vulnerable as they advertise that the accommodation is occupied by a frail person.

Where several elderly people live close together, a more elaborate system is available, whereby one light and buzzer is located in the best position, for example, on an end wall near a main road. This is to ensure that a response is gained as quickly as possible from the general public. In addition to this light, there are separate identification lights outside each dwelling. The average cost of these multiple alarm units is £84 per dwelling.

* The costs of alarms in this chapter, unless otherwise specified, are based on a report on alarm systems written for the Chester le Street Housing Committee by Mr Martin the District's Chief Architect (1976).

(b) Neighbour Supervised Systems

Alarms can be installed where the alarm rings in the home of a neighbour rather than outside the house. This has advantages in that the neighbour will probably have a key and will be willing to make whatever arrangements are required. The elderly person may feel more willing to use the alarm if he or she knows the call will be answered by a friend rather than a stranger, especially when they are not experiencing a "major emergency". The scheme will not work so well if the neighbour is often out or is so frail that the first person is afraid to call him or her out. The cost of installing these alarms is around £84 per dwelling. If required several neighbours can be linked to one alarm.

(c) Self-Help Groups

Self-help groups can be established where a number of elderly people have an alarm system installed and the master is monitored by one of the more active members. The person receiving an alarm call will investigate the call and bring in the relatives, a doctor or other services as required. With this type of alarm the time spent waiting for emergency help to arrive is usually reduced, compared with unattended alarms, but there may be problems in obtaining a tenant willing to accept the responsibility of monitoring the calls. Most of these schemes have the alarms on a ring circuit and use a master which can easily be passed to another tenant if the normal person is ill or on holiday. The average cost of installing these alarms is around £110 per dwelling.

(d) Paid Tenant Supervisor

This scheme is similar to the self-help groups except that the council provides free rent and telephone to the person accepting the calls. This type of scheme can work where some degree of support is required but the number of dwellings is too small to warrant a full-time warden.

(e) Radio Transmitter Alarms

Individual dwellings, wherever located in an area, can be fitted with a radio transmitter alarm, which, when triggered, causes a signal to be sent to a manned centre. The centre can be run by the local authority or by a commercial organization, such as those providing emergency call systems for general practitioners. When an emergency signal is received the centre will contact the client's next of kin, despatch a social worker, peripatetic warden or the warden from a nearby sheltered housing scheme. With one particular scheme which is used in Holland up to 1000 "at risk" dwellings can be monitored by a single control unit, provided they are within approximately two and a half miles of the units. The Metropolitan Borough of Stockport (1976) studied the scheme and found the cost in 1976 to be in the region of £1 per week per dwelling.

This type of scheme provides twenty-four hour cover for elderly people living in the community and, if desired, for people in sheltered housing when the warden is off duty.

Whilst the system is very suitable for people who do not need frequent warden services the disadvantage is that at the moment only a one way non-speech service is available and false alarms cannot be cancelled. Every call registered from an elderly person therefore has to be personally investigated. It is understood that two way radio transmitted speech systems have been developed but so far licencing regulations have not been worked out with the Post Office. These schemes, when available, although more expensive to purchase, are likely to reduce running costs because it will be easy to cancel false alarms, and time and effort can be saved by quickly sending the right type of help to the scene of an emergency.

(f) Fail-safe Alarms

Nearly all the above mentioned alarms can be associated with passive alarm triggers. These set off an alarm on the basis of "timed inactivity", for example when a pressure mat in a well used part of the dwelling is not trodden on or a lavatory not flushed for more than a pre-set number of hours.

If associated with good supervision these systems can replace the need for some-one to check daily that an elderly person is well.

(g) Telephones as Alarms

Under the 1970 Chronically Sick and Disabled Persons Act, Local Authorities have the power to provide, or assist in obtaining, telephones for the handicapped, which, of course, includes some elderly people.

Whilst telephones can be very useful for calling friends, relatives, doctors and other services they assume that the elderly person is capable of dialling a call after an emergency has occurred and someone suitable is available to respond to the call for help. A number of aids are available to help disabled people to use the telephone but these are only provided for known disabled persons and may not be available, when an "active" elderly person has an emergency and finds it too difficult to dial.

(h) Telephone "Check and Chat" Services

In order to overcome some of the problems already mentioned, telephone checking services can be provided. Under these a volunteer or paid council employee rings people known to be at risk several times a week or daily to check they are well. The callers will also give advice when requested and call in other statutory and voluntary services as required. If the client does not answer the telephone but has given no indication he or she will be out, a listed neighbour, friend or social worker is contacted and asked to visit the client to check that all is well.

Many of these services provide no facilities for clients to ring the callers in emergencies for it is felt that, as they have a telephone, it is best if they contact the service they require direct.

A scheme operating in Durham which uses paid staff to make the calls costs around £20 per annum per client plus the cost of the telephone rental.

(i) Telephone Emergency Services

In addition to "check and chat" services some schemes provide a twenty-four hour emergency service which clients can ring if they experience an emergency or are frightened in any way. The centres usually have a list of social workers, doctors, next of kin and other support services who can be sent round to a home if necessary.

Peter Gregory made a study of one such scheme in 1975, the Gateshead Emergency Telephone Service, and found that whilst the "check and chat" calls and emergency service were appreciated the average cost worked out at £115 per client per annum, plus the installation and rental charges of the telephones. Since the major cost, that of manning the centre continuously, is a fixed charge an increase in the number of clients would probably reduce the average cost per client.

3. PERSONAL ASSISTANCE

Most elderly people in need of some assistance are cared for by their relatives or friends without any assistance from public and voluntary agencies. The Department of Health and Social Security's Good Neighbour Scheme (Local Authority Circular, LAC(76)25, Health Circular HC(76)54) launched in November 1976 aimed to increase this form of help.

There are however a number of organized schemes which provide a service similar to that given by a warden.

(a) Organized Voluntary Visiting Schemes

There are several schemes in Durham whereby volunteers undertake to visit a number of elderly persons on a regular basis. This may range from once a day to once a fortnight. These schemes are mainly run by voluntary bodies and they vary in the formality with which they are organized. At the simplest they involve putting a visitor in touch with an elderly person and hoping that a friendship develops and that the visiting continues. More elaborate schemes involve providing a paid organizer to co-ordinate the scheme, back-up facilities and training for all concerned. The volunteers' visitors may be asked to keep a record of the clients' doctors and next of kin and to send in a monthly report confirming daily calls and passing on important information.

Where the volunteer calls briefly each day the service is very similar to that given by some wardens. The volunteer visiting schemes tend to work well unless an elderly person is very ill and there are no relatives or other friends available to look after them. This puts a severe strain on the visitor, whether or not they provide the practical and emotional support required. More volunteers might be recruited if there was some way in which this strain could be avoided.

Another problem which has been experienced by organizers is that it is comparatively easy to establish schemes in areas where a good community spirit already exists, but much harder in areas where people are not so friendly and yet where there is a greater need for such a service.

Where all the work is carried out voluntarily the cost of these schemes is almost negligible, the only charges being the organizer's telephone, postage and petrol expenses (if claimed). Even where a paid organizer is employed the cost may be very low. In a scheme in Sunderland, the average cost per client was under £10 per annum although most received a daily call from a volunteer.

A less frequent service is often performed by special housing social workers who periodically visit tenants. For example some charitable organizations providing non-sheltered housing accommodation for elderly people, have special volunteers who regularly visit all tenants to ensure that they are well. This person checks that the health of the tenant is not deteriorating unduly, gives advice and calls in services where this is required.

(b) Visits by Local Authority and Health Service Personnel

Where a home help is provided she carries out, during the time she is there, most of the duties of a warden as well as her cleaning and supporting jobs. District nurses, health visitors, social workers and meals on wheels staff also perform a similar role and in some areas the visits are co-ordinated so that someone calls every week-day on very frail people.

When these people are calling it may be unnecessary for anyone else to be organized to visit but problems arise at the weekends when most staff are off-duty. If a daily check is required, a volunteer might be employed at weekends for this is the time of the week when certain types of volunteers are most willing to offer their services.

(c) Emergency Care Service

Most elderly people need no assistance except for an occasional few days or weeks if they are taken ill. In the vast majority of cases the elderly person's relatives are able to care for them but there are a few who have no-one to turn to or the relatives are not available to help at that particular time. Some of these people have kindly neighbours or volunteer visitors but sometimes the latter are afraid to get involved too closely with the elderly person as they fear they may be obliged to give more help than they wish to give.

Instead of providing full sheltered housing services for these elderly people, it might be better to provide an emergency service which can be called upon with the minimum of delay. To some extent the home help and home nursing services fulfil this function but they appear insufficiently flexible or under-staffed to provide services for many such people.

Michael Davis of Newcastle University is currently looking for funds to organize and assess a scheme which he hopes would bring, at low cost, many of the advantages of sheltered housing to elderly or disabled people in independent dwellings. The people in his scheme would be provided with a two-way radio transmitter linking them to a manned centre. A set number of home helps, home nurses and other service personnel would be allocated to the scheme but the number of hours of help given to each client would vary according to their health and need at any given time.

Thus if an elderly person had a bad attack of asthma, he would contact the centre who could arrange for a doctor and the person's relatives to go to the dwelling immediately. In the morning a home help, nurse, or those services which were required would call, and continue to call though perhaps less frequently until the person was well again. It is hoped the scheme would be more economical on staff time in that services would not be provided unless really needed.

Even this scheme assumes a set number of staff and yet it is in winter that elderly people need most assistance. An emergency care service would be more economic if extra staff could be taken on only as required. If such a scheme were provided it could also be used to give support to wardens at the occasional times of year when they have too many demands made upon them. If this extra help were available, and relief wardens are an ideal source of recruitment, it is possible that wardens could manage with larger numbers of tenants.

(d) Peripatetic Wardens

Radio transmitter alarm systems linked to manned centres were mentioned earlier and an extension of this would be to employ wardens to visit occasionally the elderly people served by the alarm system. The visits would be used to check that the elderly people are well and to give support when required, for example, after an emergency call has been received.

Special wardens could be employed to carry out this work or, where geographically feasible, the warden of a nearby sheltered housing scheme could provide this service for a few elderly people living near her in independent dwellings.

With this type of scheme, especially if associated with an alarm system, some of the benefits of sheltered housing can be brought to tenants who do not wish to move into formal sheltered housing schemes and elderly people can stay amongst their friends and relatives who will probably be willing to provide some support when they are ill. From the point of view of the District Council this is a cheaper form of care than sheltered housing or old person's hostels for there are no new capital costs involved and only minimum running costs, i.e. the warden's salary and the alarm system.

This type of scheme is especially appropriate for owner occupiers and those in privately rented accommodation. However, one of the great barriers standing in the way of providing this service is that support for elderly people in private accommodation is the responsibility of the County Social Services Departments, whereas warden support for tenants in local authority accommodation is organized by the housing departments at District levels. As the District Councils have much experience of employing wardens, County Councils might find it useful to let the District housing departments act as their agents in providing warden services for non-council housing elderly people.

Chapter 6COSTS OF ALTERNATIVE FORMS OF CARE
FOR THE ELDERLY

For the majority of elderly persons the alternatives to living in sheltered housing are to live in :-

- (a) Local authority house.
- (b) Local authority bungalow.
- (c) Local authority elderly person's bungalow.
- (d) Owner-occupied dwelling.
- (e) Dwelling shared with younger relative(s).
- (f) Old person's hostel.
- (g) Hospital.

It is outside the scope of this thesis to compare the long-term social and medical benefits of each of these forms of care as an alternative to the costs of sheltered housing. However, consideration has been given to the costs of these alternatives, except hospital care, as this is not considered a comparable alternative.

(a) Local authority house

The cost of a new three-bedroom semi-detached council house is used as a basis for comparison as most of the tenants in sheltered housing come from such houses, and if they remain in their old home the local authority must build new houses for the younger families who would otherwise occupy them. If they were previously on a waiting list they might have been allocated a house if no small flats or bungalows were available.

The cost of a new three-bedroom, five person, house was ascertained, using the same method as that used for sheltered housing, and is taken as £12,600. This figure agrees closely with the actual costs incurred by District Councils in Durham. Management and maintenance costs are taken to be £200 per annum.*

(b) Local authority ordinary bungalow

Some elderly people are housed in ordinary small bungalows provided by local authorities but not specially designed for elderly persons and therefore not containing any special safety factors. The capital value of these 'ordinary bungalows' is taken to be about £9,600, and management and maintenance £150 per annum.

(c) Local authority elderly person's bungalow

Before sheltered housing schemes were made available most local authorities provided specially designed bungalows for elderly people, and still do so, even though some may have been converted to a form of sheltered housing.

The cost of providing these bungalows has been taken as the cost of providing new bungalows identical to those built for "Category I" sheltered housing schemes, but excluding the cost of an alarm system and warden or any communal facilities. The capital cost of such dwellings is taken as £10,200 and management and maintenance as £150 per annum.

*This is an arbitrary figure chosen to be a little higher than that of bungalows.

(d) Owner-occupied dwelling

In comparing the cost of providing full local authority accommodation with that incurred in supporting elderly people in owner-occupied accommodation, it was assumed that any mortgage on the property has been paid off (and thus no exchequer subsidy provided via income tax allowances of loan interest), and that the only costs to public funds are those of providing home helps, meals on wheels, and any other domiciliary services required.

(e) Dwelling shared with younger relative(s)

It is difficult to estimate the cost of this style of living as there are so many variations in the way the capital and running costs of the household are allocated between members and in the different types of dwelling occupied.

To simplify the matter, it was decided to assume that the younger generation was already occupying the dwelling and that no extra capital or running costs were incurred by the local authority. The only costs involved, therefore, are those of services such as meals on wheels and home nurses.

(f) Old person's hostel

The cost of providing one place in a new hostel in Durham was calculated using as similar a method as possible to that used to ascertain the cost of sheltered housing.

The average cost of providing one place in a new hostel in Durham in 1975/6 was obtained and one point five per cent added for County Administrative costs and five per cent for capitalised interest. The average capital cost comes to £8,800.

For comparative purposes loan charges are calculated as being spread over sixty years, although the County Council normally pays for its hostels over a very short period or even out of current income. As Durham had only two schemes costed in 1975/6 seven other county councils in the Northern Economic Planning Region were contacted to see if the Durham costs were representative. It was found that the Durham figures were indeed fairly typical.

Current costs are taken as the average weekly costs per resident actually incurred in the ten most recently opened homes for forty-five to fifty tenants in County Durham. The average current costs were £30.30 per week per resident. (County Council Statistics 1975/6.) The high current cost of hostels is mainly due to the high staff/resident ratio necessary for the care of elderly people in the hostel, many of whom are likely to have quite severe infirmities.

While all tenants in sheltered housing pay the standard rents, currently about twelve per cent of the real cost, the charge to residents in hostels is related to their means. A maximum charge of £29.54 per week is made (about fifty-five per cent of the real cost in this case) and the capital and almost all the income of tenants, including state and occupational pensions and interest on investments, is taken into account in assessing their ability to pay. Those that cannot pay the full amount pay what they can, but must be left with at least £2.65 per week for personal expenses. In 1975/6 the average charge to residents was £12.88, a low mean as between the maximum of £29.54 and the minimum of £10.65.

It should be noted old person's hostels are generally administered by the County Social Services Department whereas most other forms of public housing are the responsibility of local authority housing departments.

Table 12 shows the Capital Cost of the various forms of local authority independent housing and sheltered housing. All costs are as at March 1976, and all bungalows have one bedroom unless otherwise specified.

Table 12

Capital Cost of Various Forms of Local Authority Dwellings

	<u>Capital Cost</u> £	<u>Rank Order from Low to High</u>
<u>Independent</u>		
Three-bedroom house	12600	7
Ordinary bungalow	9600	1
Elderly person's bungalow	10200	2
<u>Sheltered</u>		
Bedsitter in block	10400	3
Flat in block	11800	6
Bungalow with max. facilities	11300	5
Bungalow with warden & alarm	10600	4

Such figures are frequently used in discussions on the relative costs of independent and sheltered housing, and yet they are misleading, for the picture changes when other relevant costs are taken into account.

The addition of just current costs and rents/hostel charges, as shown in Table 13 alters the rank order of the cost of these forms of housing and makes a three bedroom house cheaper to provide than a sheltered housing flat in a block.

Table 13

Summary of Costs of Providing Alternative Forms of Care per Dwelling

	Local Authority Owned			Local Authority Sheltered Housing			
	House	Ordinary Bungalow	Old P.'s Bungalow	Bed-sitter in Block.	Flat in Block	Max. Fac. Bungalow	Alarm & Warden Bungalow
	£	£	£	£	£	£	£
Capital Cost	12600	9600	10200	10400	11800	11300	10600
Loan Charge at fourteen per cent over sixty years per week	34.00	25.90	27.50	28.00	31.80	30.50	28.60
Current cost per week	3.80	2.90	2.90	6.40	6.50	5.20	4.80
Gross Cost	37.80	28.80	30.40	34.40	38.30	35.70	33.40
Less rent or hostel charge	6.00	4.00	4.00	3.50	4.00	4.00	4.00
Net Cost per week	31.80	24.80	26.40	30.90	34.30	31.70	29.40
Rank order from low to high	6	1	2	4	7	5	3

In comparing the cost of local authority owned independent and sheltered housing with that of owner-occupied and 'living with relatives' dwellings, and with county council administered old person's hostels, it is necessary to include the transfer costs of state pensions and any supplementary pensions and allowances.

The income of tenants will vary greatly but to facilitate discussion two sets of figures have been prepared, one for a 'poor' person who has no income other than the state pensions and allowances, and the other for a 'rich person' who can afford the full cost of the hostel. The latter person will have an income of at least £32.29 a week (or capital equivalent after certain allowances), that is £29.54 for the hostel charge and £2.65 for personal expenses.

Tables 14 and 15 show the costs borne by local authorities, county councils, and central government for varying forms of care. They take into account capital and current running costs, rents and hostel charges, state pensions, and supplementary pensions and benefits. The latter show the costs for a person living alone as this is the most common type of tenancy.* The state pension is based on £13.70 per week for a single person and £21.55 for a couple plus an allowance for rent. A special allowance is available for owner-occupiers which is equivalent to the rent allowance. This is calculated by adding together general and water rates, insurance, any ground rent, and an allowance for repairs. The total is divided by fifty-two to obtain the weekly additional supplementary allowance.

The sum of fifty-five pence is added as a heating allowance for persons on supplementary benefits. This is awarded where a person finds it hard to move around because of age, or has a long term illness such as bronchitis or rheumatism or the house is difficult to keep warm. Not all elderly people will receive this allowance but there will be others who receive a higher allowance if they fulfil more than one of the above conditions or are housebound, seriously ill or confined to bed.

* Where two people live in a dwelling in the community the housing cost per person is almost half that of providing it for one person. However there are no similar savings if both members have to go into an old person's hostel or one goes into a hostel and the other remains in the community.

Where there is a central heating fixed charge, any charge over £2.20 is met by supplementary pensions. No allowance is made for invalidity pensions, graduated pensions, attendance allowances, disablement benefits, industrial injury, worker's compensation, pneumoconiosis or byssinosis benefit schemes, or special supplementary benefit allowances for special diets, laundry, bedding or new clothing, although some tenants will be in receipt of these. Rates have been excluded as the money is returned to the local authority by tenants.

Tables 14 and 15 show that for a 'rich' person a place in a hostel is cheaper, as far as public expenditure is concerned, than any form of local authority provision, whereas for a 'poor' person it is the most expensive.

The table also suggests it is cost effective to give a great deal of support to a frail elderly person living with relatives if by this means the need for sheltered housing or hostel accommodation is avoided. However, at present, such support does not seem to receive much encouragement by the public authorities. Home helps, for example, are not normally provided if relatives are available to give support, or if provided are perhaps only for half an hour per day to give personal services to a frail elderly person whose relatives are out of the house all day.

Table 14

Weekly Cost of Care for "RICH" Elderly Persons Living Alone who have Sufficient Means (Income or Capital) to Meet a Hostel Charge of £29.50 per Week. Capital and Current Costs, Rents and Pensions

Independent		Local Authority Owned				Local Authority Sheltered Housing			
With Relatives	Owner Occupied	Family House	Ordinary Bungalow	Old Person's Bungalow	Old Person's Hostel	Bed-sitter in Block	Flat in Block	Max. Fac. Bungalow	Alarm & Warden Bungalow
£	£	£	£	£	£	£	£	£	£
-	-	34.00	25.90	27.50	23.70	28.00	31.80	30.50	23.60
-	-	3.80	2.90	2.90	30.30	6.40	6.50	5.20	4.80
-	-	37.80	28.80	30.40	54.00	34.40	38.30	35.70	33.40
-	-	6.00	4.00	4.00	29.50	3.50	4.00	4.00	4.00
-	-	31.80	24.80	26.40	24.50	30.90	34.30	31.70	29.40
13.30	13.30	13.30	13.30	13.30	13.30	13.30	13.30	13.30	13.30
13.30	13.30	45.10	38.10	39.70	37.80	44.20	47.60	45.00	42.70
1	1	9	4	5	3	7	10	8	6

Loan Charge

Current Cost

Less Rent or Hostel Charge

Net Housing Cost

State Pension

Total Cost to Authorities

Rank order from low to high

Table 15

Weekly Cost of Care for "POOR" Elderly Persons Living Alone Who Have No Savings or Income Other Than Their State Pensions and Supplementary Benefits. Capital and Current Costs, Rents and Pensions

Independent		Local Authority Owned				Local Authority Sheltered Housing			
With Relatives	Owner Occupied	Family House	Ordinary Bungalow	Old Person's Bungalow	Old Person's Hostel	Bed-sitter in Block	Flat in Block	Max. Fac. Bungalow	Alarm & Warden Bungalow
£	£	£	£	£	£	£	£	£	£
-	-	34.00	25.90	27.50	23.70	28.00	31.80	30.50	28.60
-	-	3.80	2.90	2.90	30.30	6.40	6.50	5.20	4.80
-	-	37.80	28.80	30.40	54.00	34.40	38.30	35.70	33.40
-	-	6.00	4.00	4.00	10.70	3.50	4.00	4.00	4.00
-	-	31.80	24.80	26.40	43.30	30.90	34.30	31.70	29.40
13.30	13.30	13.30	13.30	13.30	13.30	13.30	13.30	13.30	13.30
0.40	6.40	6.40	4.40	4.40	-	3.90	4.40	4.40	4.40
-	1.70	1.70	1.10	1.10	-	0.80	1.10	1.10	1.10
13.70	21.40	53.20	43.60	45.20	56.60	48.90	53.10	50.50	48.20
1	2	9	3	4	10	6	8	7	5

Loan Charge

Current Cost

Less Rent or Hostel Charge

Net Housing Cost

State Pension

Supplementary Benefit

Heating Allowance

Total Cost to Authorities

Rank order from low to high

If more support was given to relatives they might be able to keep house for an elderly person for a longer period of time. As more and more emphasis is placed on community care, much more thought needs to be given to the ways support can be given to relatives caring for elderly people at home. Moreover such help should not only be financial but also in terms of encouragement and advice, and perhaps relief services to enable the relatives to take a holiday.

Owner-occupiers should also be helped to stay in their own home or be encouraged to purchase smaller privately owned accommodation for if they move into sheltered housing or a hostel a greatly increased financial burden falls on public funds. Table 14 shows that it would be cheaper to support a frail 'rich' person living in an owner-occupied dwelling up to a cost of £34 per week when interest rates are fourteen per cent (or £25 at ten per cent) rather than provide him or her with a sheltered housing flat in a block.

In fact in most cases it would be unnecessary to provide such a large amount of help, but it might well pay the community to provide them with an alarm system and a peripatetic warden in order to keep them safely and happily in their own homes. At the moment very few owner-occupiers receive these services. One of the reasons for this was discussed on page 125.

To make a reasonable comparison of the costs of an old person's hostel with other forms of care it is also necessary to take account of the extra care that is normally provided in hostels and which would be equally necessary for elderly people preferring to remain in the wider community.

Separate calculations have been made to show the cost of providing each form of care for "rich" and "poor" people who need a very high level of domiciliary services. Weekly provision has been taken as ten hours of home helps (three where the person lives with relatives), five meals on wheels and two visits from a district nurse. It is realized that the level of provision will vary according to the general availability of these services within a county. Durham has a high provision of almost all services for the elderly.

In Durham home helps cost £1 per hour. No charge is made to "poor" recipients but the full cost, up to a maximum of £8.30 per week*, is charged to the "rich". Subsidies on meals on wheels are taken to be forty-five pence per meal. The cost of a visit from a district nurse is taken to be £1 and assumes only a brief visit, as opposed to the provision of major nursing care.

At the time of research interest rates were around fourteen per cent and have since dropped quite dramatically. At the bottom of Tables 16 and 17 may be found the costs which would be incurred if the rate is taken to be ten per cent.

* Based on the single person receiving a state pension of £13.30 per week plus an occupational pension of £20 and having a rent of £4.

Table 16
 Net Weekly Cost of Care for Very FRAIL or Disabled "RICH" Elderly Persons Living Alone Who Have Sufficient Income or Capital to Meet a Hostel Charge of £29.50 Per Week

	Independent		Local Authority Owned				Local Authority Sheltered Housing			
	With Relatives	Owner Occupied	Family House	Ordinary Bungalow	Old Person's Bungalow	Old Person's Hostel	Bed-sitter in Block	Flat in Block	Max. Fac. Bungalow	Alarm & Warden Bungalow
£	£	£	£	£	£	£	£	£	£	£
Net Cost of Housing or Hostel after Rent/Hostel Charge	-	-	31.80	24.80	26.40	24.50	30.90	34.30	31.70	29.40
Total Pensions	13.30	13.30	13.30	13.30	13.30	13.30	13.30	13.30	13.30	13.30
Home Helps	-	1.70	1.70	1.70	1.70	-	1.70	1.70	1.70	1.70
Meals on Wheels	2.30	2.30	2.30	2.30	2.30	-	2.30	2.30	2.30	2.30
Home Nurse	2.00	2.00	2.00	2.00	2.00	-	2.00	2.00	2.00	2.00
Total Cost to State (Interest @ 14% over 60yr)	17.60	19.30	51.10	44.10	45.70	37.80	50.20	53.60	51.00	48.70
Rank order low to high	1	2	9	4	5	3	7	10	8	6
Tot. Cost to State (Interest @ 10% over 60yr)	17.60	19.30	41.40	36.70	37.80	31.00	42.20	44.50	42.30	40.50
Rank order low to high	1	2	7	4	5	3	8	10	9	6

Table 17
Net Weekly Cost of Care for Very FRAIL or Disabled "POOR" Elderly Persons Living Alone Who Have No Savings or Income Other Than Their State Pensions and Supplementary Benefits

	Independent		Local Authority Owned				Local Authority Sheltered Housing			
	With Relatives	Owner Occupied	Family House	Ordinary Bungalow	Old Person's Bungalow	Old Person's Hostel	Bed-sitter in Block	Flat in Block	Max. Fac. Bungalow	Alarm & Warden Bungalow
	£	£	£	£	£	£	£	£	£	£
Net Cost of Housing/Hostel after Rent/Hostel Charge	-	-	31.80	24.80	26.40	43.30	30.90	34.30	31.70	29.40
Total Pensions & Supp. Benefits	13.70	21.40	21.40	18.80	18.80	13.30	18.80	18.80	18.80	18.80
Home Helps	3.00	10.00	10.00	10.00	10.00	-	10.00	10.00	10.00	10.00
Meals on Wheels	2.30	2.30	2.30	2.30	2.30	-	2.30	2.30	2.30	2.30
Home Nurse	2.00	2.00	2.00	2.00	2.00	-	2.00	2.00	2.00	2.00
Total Cost to State (Int. @ 14% over 60 yr)	21.00	35.70	67.50	57.90	59.50	56.60	63.20	67.40	64.80	62.50
Rank order from low to high	1	2	10	4	5	3	7	9	8	6
Total Cost to State (Int. @ 10% over 60 yr)	21.00	35.70	57.80	50.50	51.60	49.80	55.20	58.30	56.10	54.30
Rank order from								10	8	6

These tables show the surprising fact that, when the costs of pensions, home helps, meals on wheels and home nurses are added to the cost of local authority housing and hostels, the hostels appear to be cheaper than local authority dwellings for very frail elderly people, cheaper that is in economic terms, although probably not in social terms.

The cost to the state of a place in a hostel for a "rich" person is considerably cheaper than all forms of local authority housing, whether or not the person receives any extra domiciliary support. Since these calculations were made the differences have, in fact, been accentuated for, although the costs of both sheltered housing and hostels have increased, the rents of the former have only risen by a few pounds a week whereas in November 1977 hostel charges in Durham were raised from a maximum of £29.50 per week to £51.66.

The cost to the state of a hostel place for a "poor" person is dearer than local authority housing where no support is required, although a place in a sheltered housing flat in a block costs only £3.50 less per week. As soon as any domiciliary services are provided to poor people the differences quickly diminish and where a high level of domiciliary support is required, for example as shown in Table 17, hostels again become the cheapest form of care.

These findings are in contrast to conventional opinion which considers hostels to be the most expensive form of community care for elderly people.

The anomaly arises mainly from the fact that the hostel tenants are means-tested, whilst those in sheltered housing pay a standard rent, regardless of capital or income. It is important to stress that it is often the system of charging recipients for these services that causes hostels to appear comparatively cheap. To illustrate this point Table 18 shows the cost of schemes to the State before and after receiving tenant contributions by way of rent or hostel charges. The table shows that although the cost to the State for a hostel place for a rich frail person is only seventy per cent of that of providing much support for the same person living in a block of flats, when the rent or hostel charge is added back the combined percentage rises to one hundred and sixteen per cent, thus making hostels the most expensive to provide. In the case of a 'poor' frail person, the percentage rises from eighty-four per cent to ninety-four per cent.

Table 18
Weekly Net Cost to State and to 'Rich' and 'Poor' Frail Tenants of Accommodation, Pensions and Benefits, and a High Level of Domiciliary Support

Local Authority Owned		Local Authority Sheltered Housing					
Family House	Ordinary Bungalow	Old Person's Bungalow	Old Person's Hostel	Bedsitter in Block	Flat in Block	Max. Fac. Bungalow	Alarm & Warden Bungalow
£	£	£	£	£	£	£	£
51.10	44.10	45.70	37.80	50.20	53.60	51.00	48.70
95.3%	82.3%	85.3%	<u>70.5%</u>	93.7%	100.0%	95.1%	90.9%
57.10	48.10	49.70	67.30	53.70	57.60	55.00	52.70
99.1%	83.5%	86.3%	<u>116.8%</u>	93.2%	100.0%	95.5%	91.5%
67.50	57.90	59.50	56.60	63.20	67.40	64.80	62.50
100.1%	65.9%	88.3%	<u>84.0%</u>	93.8%	100.0%	96.1%	92.7%
73.50	61.90	63.50	67.30	66.70	71.40	68.80	66.50
102.9%	86.7%	88.9%	<u>94.3%</u>	93.4%	100.0%	96.4%	93.1%

Rich Person

Net Cost to State
(as per Table 16)

% Cost as compared
with Flat in Block

Gross Cost to State
and Tenant

% Cost as compared
with Flat in Block

Poor Person

Net Cost to State
(as per Table 17)

% Cost as compared
with Flat in Block

Gross Cost to State
and Tenant

% Cost as compared
with Flat in Block

Table 19 summarises the main findings of this chapter by comparing the cost of each form of care as against that of providing a sheltered housing flat in a block. The table shows the variations in costs and, in theory, should provide some guidance to decision-makers discussing forms of care for the elderly. In practice, however, each of the agencies providing services sees the situation from its own point of view, rather than globally, and is primarily concerned to provide the services which are most economical for themselves. Thus to the local authority and to the county council sheltered housing appears cheaper than hostel accommodation as the former is highly subsidized by the Department of the Environment. To see the picture globally it is necessary to consider all costs to the State for as shown this strongly influences the relative costs of the alternatives discussed.

Table 19

Summary of Net Costs to State of Various Forms of Care, as Compared With Flat in Block

Independent		Local Authority Owned				Local Authority-Sheltered Housing			
With Relatives	Owner Occupied	Family House	Ordinary Bungalow	Old Person's Bungalow	Old Person's Hostel	Bed-sitter in Block	Flat in Block	Max. Fac. Bungalow	Alarm & Warden Bungalow
%	%	%	%	%	%	%	%	%	%
27.9	27.9	94.7	80.0	83.4	79.4	92.9	100.0	94.5	89.7
32.8	36.0	95.3	82.3	85.3	70.5	93.7	100.0	95.1	90.9
25.8	40.3	100.2	82.1	85.1	106.6	92.1	100.0	95.1	90.8
31.1	53.0	100.1	85.9	88.3	84.0	93.8	100.0	96.1	92.7

'Rich' Person

Requiring no domiciliary support

Requiring high level of domiciliary support

'Poor' Person

Requiring no domiciliary support

Requiring high level of domiciliary support

Chapter 7PROVISION OF SHELTERED HOUSING BY
AUTONOMOUS BODIES

There are at least seven hundred and fifty-four dwellings in sheltered housing schemes in County Durham which are not owned by local authorities, but by autonomous bodies such as Housing Associations or Almshouses. Table 20 shows their distribution according to District and the organization to which they belong. Organizations providing less than ten places are excluded.

Table 20Provision of Sheltered Housing by Autonomous Bodies and District

<u>District</u>	Anchor	Hanover/ Jane Cameron	British Legion	Licensed Victuallers	North Eastern Housing	E.D. Walker	Durham Aged Mineworkers	PeterLee Development Corporation	Total
Derwent			42				12		54
Chester-le- Street							6		6
Wear Valley		16			108				124
Durham		31		22					53
Easington					38		56	82	176
Teesdale					34				34
Sedgefield					42		108		150
Darlington	60	28	28			41			157
Total	60	75	70	22	222	41	182	82	754

Table 21 shows the provision of these dwellings in comparison with that of local authorities. Autonomous bodies provide around eight per cent of the sheltered housing in County Durham.

Table 21

Sheltered Housing Provision by Autonomous Bodies and Local Authorities
by Dwellings and People

District	Population Aged 65 and over	Autonomous Bodies			Local Authority			Combined		
		No. of Dwellings	Estimated No. of People ¹	% of Population Aged 65 and over	No. of Dwellings	Estimated No. of People ¹	% of Population Aged 65 and over	No. of Dwellings	Estimated No. of People ¹	% of Population Aged 65 and over
Derwent	14,285	54	70	0.5	629	818	5.7	683	888	6.2
Chesterle Street	6,033	6	8	0.1	563	732	12.1	569	740	12.2
Wear Valley	10,175	124	161	1.6	1,052	1,368	13.4	1,176	1,529	15.0
Durham	10,566	53	69	0.7	1,226	1,594	15.1	1,279	1,663	15.7
Easington	14,323	176	229	1.6	1,966	2,556	17.8	2,142	2,785	19.4
Teesdale	4,301	34	44	1.0	30	39	0.9	64	83	1.9
Sedgefield	11,352	150	195	1.7	2,406	3,128	27.6	2,556	3,323	29.3
Darlington	14,055	157	204	1.5	323	420	3.0	480	624	4.4
Total	85,090	754	980	1.2	8,195	10,655	12.5	8,949	11,635	13.7

1 This is based on an estimate of three dwellings in every ten being occupied by two people; the rest are occupied by one person.

The researcher made a visit to at least one scheme run by each of the autonomous bodies listed above and found the services and accommodation which they offered were very similar to the sheltered housing provided by local authorities, as described in Chapter 2. The main differences in provision by autonomous agencies arise from financial aspects. A general description of housing associations and almshouses is given and then brief information on each organization which operates in County Durham. The chapter concludes with a discussion of the reputed advantages of sheltered housing provision by private organizations.

HOUSING ASSOCIATIONS

Housing Associations, the first of which were created in the middle of the last century, have always been concerned with providing well built accommodation to let at low rents. However, the movement mainly expanded as a result of acts passed in the late sixties and early seventies which gave much encouragement to the work of housing associations and set up the Housing Corporation which could lend associations capital for conversions and new schemes. These changes enabled Housing Associations to plan for the future with confidence and without dependence upon charitable donations and rate fund contributions from local authorities.

Housing Associations provide a variety of housing for different groups of people and the provision of sheltered housing for the elderly is a comparatively recent development. However by 1976 12.6% of Housing Corporation loan instructions were for "Category II" schemes for the elderly and 7.5% for "Category I" schemes for the elderly, some of which will have been sheltered housing. (Personal Communication, April 1977.)

When Housing Associations plan to build new sheltered housing schemes, they can approach the Housing Corporation, a local authority or a building society for a loan. Loans from the Housing Corporation are the most common, although rigorous criteria have to be met before these loans are given. When the scheme is completed the loan is paid back through mortgage arrangements or the Association raises all or part of the capital required to repay the loan. The provision of finance for sheltered housing schemes plays a large part in the Corporation's work but they now feel that too much emphasis was placed in this direction in the past and are looking for other ways of providing housing for the elderly and are directing funds to other specialist needs, particularly the physically and mentally handicapped, (personal communication).

Where housing of value to the community is provided and the Housing Association is working closely with the Local Authority to alleviate particular housing shortages, a Housing Association Grant, to repay part of the loan, can be applied for from the Department of the Environment. The Department's circular 170/74 lays down the priorities which must be met, if this grant is to be given, and each scheme is judged in the light of local circumstances. The grant is the lump sum sufficient to reduce the mortgage on the scheme to such a level as can be met from the fair rent, after deductions for running costs. In exceptional circumstances it may be one hundred per cent of the capital cost of the scheme.

Provided that the costs of the project are within the levels qualifying for grant aid, the grant received will effectively cover the anticipated net deficit. Where a Housing Association Grant is given the local authority of the district in which the scheme is located usually gets nomination rights over a number of tenancies. Fifty per cent of all tenancies is a common proportion.

The Housing Association Grant is provided on completion of a scheme and after this the Associations are expected to be able to repay outstanding loans and meet running costs out of their income. The grant does not take account of increased interest rates, subsequent inflation or other unforeseen circumstances, and if the Association incurs a deficit on its revenue account and they are unable to increase their rents, (they must charge "fair rents") they may be eligible to apply for a Revenue Deficit Grant. The grant is payable entirely at the discretion of the Secretary of State and only provided where the circumstances leading to the deficit are beyond the control of responsible financial planning.

Local Authorities are allowed to make grants to Housing Associations for the welfare elements of sheltered housing schemes, i.e. for the accommodation and salary of the warden and for communal facilities. No limit is imposed by legislation on the amount payable, which may be an annual contribution and/or an initial capital payment at the discretion of the Authority. No grants of this kind are given to housing associations in County Durham although assistance is given to one charity providing sheltered housing.

Housing Associations which are registered charities can obtain a fifty per cent reduction on the general rates of the communal areas of their schemes and in some districts the same reduction is given to all the old people's accommodation as well, although in these cases, the tenants cannot claim any rate rebate from the local authority.

Housing Associations can build to a higher standard than local authorities (who have to keep within ten per cent of the cost yardstick) and still receive loan approval and a grant, providing that the Association is able to meet all the additional expenditure from its own resources. Extra money is sometimes spent on items such as greenhouses, lifts, hairdressing rooms and higher standards of finishes to the building. However, there is not often much money available for such refinements.

"Fair rents" must be charged for Housing Association dwellings but, where applicable, tenants can apply for rent allowances and rate rebates or, if claiming Supplementary Pensions, they can obtain rent allowances in their Supplementary Pension.

Tenants are also eligible to apply for all normal domiciliary services such as meals on wheels, home helps and district nurses.

ALMSHOUSES

Some of the sheltered housing in Durham is provided in Almshouses. The word Almshouses used to mean "dwellings for elderly poor, subject to charitable Trust and occupied rent and rate free" (National Association of Almshouses: publicity literature 1970) but nowadays, almshouses may make modest maintenance charges to tenants at a level agreed by the Charity Commissioners, sufficient to balance their revenue account.

When almshouses are founded, either under a will of a deceased person or as a charitable bequest by a living donor, the benefactor(s) are expected to endow them for their up-keep. In the past this was usually adequate to meet all running costs and to provide 'pocket money' for tenants but nowadays this income is often inadequate and money has to be raised from external sources to meet capital and current costs. Most almshouses, which provide new accommodation, register as a housing association, as this makes them eligible for all grants and subsidies which are payable to housing associations. The main advantage of being a "pure" almshouse is that very low rents can be charged, whereas if they register as a housing association as well they must charge a "fair rent". These low rents do not in fact benefit the least well off tenants, for they can obtain help towards the cost of high rents from the Supplementary Benefits Commission or through rent allowances. It is the tenants with some income in addition to the retirement pension who benefit most.

Almshouses vary greatly in the way they support their tenants and only some provide sheltered housing. However, in the past, most almshouses provided some supervision or support for their tenants and, with some justification, some of them can be called the forerunners of sheltered housing. The "Sir E. D. Walker Homes" trustees installed a warden to look after the tenants of separate bungalows as early as 1919, whereas the first local authority schemes in the area did not open until about 1968.

The Almshouses providing sheltered housing in Durham for more than ten people are the "Sir E.D. Walker Homes", the "Jane Cameron Trust" and the "Licensed Victuallers' Homes".

In terms of services and accommodation these almshouses provide sheltered housing which is almost identical to that provided by other autonomous bodies and local authorities.

Where tenants cannot afford the rents of almshouses they can apply for rent allowances and rate rebates or for the rent to be taken into account for the assessment of supplementary pensions. Tenants can also, where applicable, apply for home helps, meals on wheels and other local authority services.

OTHER AGENCIES PROVIDING SHELTERED HOUSING

In addition to Housing Associations and Almshouses there are two other agencies providing sheltered housing. These are the Peterlee New Town Development Corporation and the Durham Aged Mineworkers Homes Association. Details of these are given in the case studies which follow.

Anchor Housing Association

The Housing Association which provides the most sheltered housing for elderly people in England and Wales was formed in 1968 by Voluntary and Christian Services. It was called "Help the Aged Housing Association (UK) Ltd.", and funds from "Help the Aged" appeals gave it its early impetus.

However, the Housing Act 1974 provided specific financial support for the sheltered housing schemes of Housing Associations and there was then less need for charitable support for the main work of the Association. In 1975 the Association decided to change its name to "Anchor Housing Association" to reflect the specialised housing role of the Association, as distinct from the fund raising and campaigning role of "Help the Aged".

The objective of the Association is "provision of sheltered housing for the elderly in need of it which will enable them to continue active and independent lives with the reassurance of background support from a warden". (Anchor's Annual Report 1974/75.) By April 1976, Anchor had over four thousand flats in operation with a further seven thousand flats in various stages of planning and construction. (Housing the Elderly, The Guardian, 6th April, 1976.) Nearly all accommodation provided by Anchor is "Category II" sheltered housing with a high proportion of bed-sitting rooms.

The Association charges "fair rents", and after receipt of Housing Association Grants, is able to cover its running costs and mortgage repayments from this income. However, if it were unable to do this it could either apply to individual local authorities for Welfare Grants or make an application to the Department of the Environment for a Revenue Deficit Grant.

Tenants pay a rent of around £5.00 for a flatlet, and £6.00 for a one bedroom flat. This excludes general and water rates. Tenants also pay a service charge of £2.50 a week per dwelling.

Heating and hot water for the individual flats is charged at a flat rate of £1.44 for single accommodation and £1.75 for double.

Accommodation is offered to the most "needy", as assessed on individual merit, taking into account such things as poor accommodation, living alone and frailty. The Association will provide accommodation for owner occupiers if they have need for sheltered accommodation, such as loneliness or inability to cope with running their home. In the past, Anchor only took people with a total capital of less than £6,000, but they found that this excluded many people in need of their accommodation and they now allow people with capital of up to £20,000 to apply for tenancies. However, where two people with similar levels of need apply for housing the one with the smaller capital would normally get the tenancy. In practice Anchor have very few ex-owner occupier tenants. A survey carried out by Anchor in 1974 showed over ninety per cent of their tenants were in receipt of supplementary pensions and many of the remaining tenants were receiving rent and rate rebates.

Anchor accommodation is very popular and there are on average six applicants for every vacancy. Applicants hear of the schemes through advertisements and personal contacts. Anchor offers around fifty per cent of their vacancies to those people on local authority housing waiting lists.

However, Anchor has found :-

"the most vulnerable and deserving are often the most resigned and least articulate: the council's list does not necessarily include their names: to find them requires effort and cost. Anchor tries to find such people by intensive local inquiry through voluntary workers, doctors and service organizations." (Housing the Elderly, The Guardian, 6th April, 1976.)

Anchor appears to be the only organization which actively goes out to find the people most in need of their accommodation.

Anchor has a fund raising department and receives money from Help the Aged as well as donations and legacies from organizations and individuals. Some of this money is used to provide facilities for tenants which cannot be afforded within the cost yardstick; items such as hairdressing rooms and greenhouses and some funds are used to subsidize social activities for the tenants. The rest of the money is used to conduct experiments, for which grants or loans are not available. For example, some schemes are being built with a day centre attached, which will be available for both tenants and other elderly people in the neighbourhood. Anchor are also looking to see what extra services might be required to enable frail old people to stay in sheltered housing who might otherwise have to go into an old person's hostel.

Hanover Housing Association

The Hanover Housing Association was set up in 1963 by the National Corporation for the Care of Old People with assistance from the Nuffield Foundation with the aim of providing sheltered housing principally as an alternative to local authority housing and for those who were unlikely to qualify for this type.

The Association has recently broadened its intake and anyone in receipt of a pension can now apply for a tenancy. By March 1976 the Association had three thousand, eight hundred and twenty-eight sheltered housing dwellings and another one thousand, three hundred and forty-three under construction. Each scheme now tends to have people from most social classes, though in the North East it is thought the majority of tenants are in receipt of supplementary pensions. (Personal communication.) Places are offered to the applicants most in need of sheltered housing and under-occupation of owner occupied accommodation is taken into account in this assessment.

Hanover raises the capital for new schemes by applying for loans from the Housing Corporation or local authorities, although the former is the most common. All developments have a Housing Association Grant and the Association is also in receipt of revenue deficit grants. The rents in the North East are £28 per month for a one bedroomed flat and on top of this tenants pay general and water rates. Hanover also has a fund raising committee and is able to provide a few extra facilities for its tenants through this source.

All Hanover's sheltered housing accommodation in Durham is in "Category I" schemes and there are few communal facilities. Emphasis is on independent living with the warden available for emergencies and general support only.

The schemes in Durham are not normal Hanover developments but the Association manages them as Trustees for the Jane Cameron Charity.

They are classified as Almshouses although registered as housing association properties. Jane Cameron left some money in her will to be used for housing old people from Northumberland and Durham. Before anybody can be considered for these particular schemes they have had to have lived in the area for one year at some stage in their lives, preference is given to single ladies. The money which she left provided only a fairly small proportion of the cost of the scheme; the balance of the money required was obtained through a housing association grant and her money was utilised to obtain extras for each scheme.

British Legion Housing Association

The British Legion Housing Association has over ninety sheltered housing schemes in England and Wales which provide accommodation for ex-servicemen, ex-servicewomen and their families. The money to develop these schemes mainly comes from the Housing Corporation although sometimes the Association borrows money from local authorities. The Association gets a Housing Association Grant towards the capital cost of schemes and running costs are mostly met from the rent income and service charges. The Association currently has a revenue deficit grant which covers the deficit on schemes which cannot meet their running costs in this way.

Day to day administration of each scheme is in the hands of a local voluntary committee made up of members of the British Legion, and there are regional offices to assist with administration. The local committees keep in close contact with their schemes and are responsible for all lettings. Priority is given to ex-servicemen, ex-servicewomen and their families, who are most in need of sheltered housing.

Such factors as the applicant's present accommodation, loneliness and lack of friends or relatives, are taken into consideration.

Licensed Victuallers Housing Association

This Association provides eighteen sheltered housing schemes in England and Wales which are available to ex-licence holders who have been a member of the Licensed Victuallers' Association for at least five years. As well as being a housing association each scheme is registered as an Almshouse. In the past the capital costs of dwellings were obtained by voluntary fund raising but now the Association can apply to the Department of the Environment for a Housing Association Grant.

Each scheme is run by a local committee who administer the scheme and allocate tenancies. Tenancies are given to those most in need of sheltered housing and there are no financial limitations on the capital tenants can have before they are considered for a tenancy. The Association charges fair rents, but the rent income is insufficient to cover running costs and the Association receives a Housing Revenue Grant. The Association has fund raising activities and the money is mainly used to provide social events for tenants.

There is only one scheme in County Durham. This consists of twenty-two bungalows which were built at Witton Gilbert in 1953. In 1972 the local authority developed a sheltered housing scheme which is adjacent to these bungalows, and asked the Licensed Victuallers' Association if they would like to join the scheme.

The Association provided a two-way communication system and the local authority appointed a warden to look after twenty-two of their own bungalows and the twenty-two belonging to the Licensed Victuallers. The latter pay half of the warden's salary.

The warden finds there are few differences between the two groups of tenants except that, as the Victualler tenants have moved to the village, they do not have relatives living nearby. This causes extra work for her, but there are several very helpful tenants who assist her in the care of ill tenants and almost all have relatives who will come to stay if they are very ill.

North Eastern Housing Association

The North Eastern Housing Association was formed in 1935 as a non-profit making organization to assist local authorities who lacked the capital and expertise to build their own accommodation. Legally and financially, the Association does not function as a Housing Association but has special regulations laid down by Parliament. Its role is more like that of a specialist Government agency, especially a New Town Development Corporation. The Association can only work in certain districts, as laid down by the Department of the Environment, and even in these the Association only builds if the local council welcomes them and are willing to finance any running cost deficits incurred on schemes in their district. The Association have over nineteen thousand dwellings in the North East of England, including many bungalows for elderly people, but has only provided sheltered housing since 1971. It now has three purpose built "Category II" schemes and has converted six groups of bungalows into sheltered housing.

It is the policy of the Association to provide warden-cover for as many of its old person's bungalows as possible, but this aim is restricted by the number of grants that can be obtained to finance warden's accommodation and the alarm system, and by the willingness of local authorities to pay the deficit on the running cost of such schemes.

The capital required for a new scheme is borrowed from the local authority of the district in which the scheme will be located. The local authority then applies to the Department of the Environment for all the grants and subsidies which it would receive if the scheme were its own. Prior to 1972 all running costs had to be met from rent income but despite this rents were generally lower than those of local authorities for similar properties. Since the Housing Finance Act 1972, the local authorities set the rents but they have to make up any difference between this and the true cost from their rate income. In exchange for this financial support, the local authorities get one hundred per cent nomination rights over tenancies.

The passing of the 1972 Housing Act threw the Association's method of operation into array and the re-organization of local authorities in 1971 enabled all authorities to provide their own sheltered housing if they so wished. Much discussion therefore took place on the future of the Association, for in many ways its role became superfluous. Consideration was given to whether the Association should hand over its properties to the relevant local authorities and then cease to exist.

Although all New Town Development Corporation properties will be handed over to local authorities in April 1978, it was decided to leave the North Eastern Housing Association to manage its existing properties, but to cease new building.

However, in order to take advantage of the expertise of the Association's staff a new conventional housing association, the North Housing Association was set up in 1974. The two organizations work together closely and the first sheltered housing built by the new Housing Association will open shortly.

Sir E. D. Walker Homes (Almshouse)

The Homes consist of forty-one separate bungalows with a communal hall and a library. An emergency alarm system and a warden have been provided since the scheme opened in 1919. The scheme was set up under the will of Sir E.D. Walker, a former major of Darlington, to provide accommodation for the aged poor of Darlington. All the dwellings have been modernised and have central heating. The scheme is currently self-financing and does not receive any support from central or local government funds. Income comes from the rents and investments left under the founder's will, plus a few donations from local charities. Rents, inclusive of general and water rates, central heating and hot water are £5 per week for single person dwellings and £10 per week for two person dwellings. If a deficit were to occur the Trustees could apply to the Local Authority for a grant towards the cost of providing the welfare services.

Durham Aged Mineworkers Homes Association

The Durham Aged Mineworkers Homes Association owns one thousand, one hundred and thirty bungalows which it rents to retired mine-workers. One hundred and eighty-two of these dwellings have been converted into sheltered housing. All bungalows were built with money raised by voluntary weekly contributions to the Association by working miners. The oldest property was built more than sixty years ago and the most recent in 1953. Accommodation is available to retired miners who belong to the Association, i.e. those who have made contributions in the past. Miners can put their name on a waiting list when they reach the age of sixty-five. Bungalows are allocated according to the length of time an applicant has been on the waiting list. Some of the accommodation has been modernised but there is a shortage of money as the closure of many pits has reduced the number of subscriptions, and hence the Association's income. Accommodation used to be rent free but tenants now pay rent of between 60p and £1 a week.

Since 1973 the larger groups of dwellings have been converted into sheltered housing by the installation of wardens and alarm systems. These facilities were either financed by welfare grants or were provided by the local authorities.

These schemes have no communal facilities, except in a couple of places where a small hall was provided when the schemes were originally built. In a few cases the local authority have their own sheltered housing scheme with communal facilities adjacent to the Mineworkers' housing and the two schemes are linked together to share the same facilities and warden.

The Association is registered as a charity, but is neither a Housing Association nor an Almshouse. Consideration was recently given to converting the Association into a Housing Association, but it was found there would be no real benefits in doing this. The position would probably be different if the Association were building new schemes rather than just running existing schemes.

Peterlee Development Corporation

The Peterlee Development Corporation was set up in the late nineteen forties to develop the new town of Peterlee. Industry was attracted to the area by financial incentives and by providing housing for the employees. No positive encouragement was given to old people to move to the new town but as workers have retired or "retired parents" wanted to move near their children, old people's bungalows have been built, and eighty-three of these have been made into sheltered housing, in three groups.

The Department of the Environment made special grants to the Development Corporation to finance these dwellings, whose running costs must mainly be met from rent income. There is no rate income available to support low rents as the rates are paid to Easington District Council. The rents for bungalows in sheltered housing schemes are approximately £2.80 a week.

In April 1978, all the Development Corporation properties will be handed over to Easington District Council and the District Councillors will then set rents and subsidize any running cost deficits in their normal manner.

As the concept of sheltered housing is considered to be successful by both the Development Corporation and the Easington District Council, plans have been produced to eventually convert all old people's housing currently owned by the Development Corporation into sheltered housing.

The Newton Aycliffe Development Corporation, in one district of Sedgefield, whose status is similar to that of the Peterlee Development Corporation, currently has no sheltered housing schemes, but plans have been drawn up to eventually convert all its old people's accommodation into sheltered housing.

REPUTED ADVANTAGES OF SHELTERED HOUSING PROVIDED BY AUTONOMOUS AGENCIES

- (1) Pressure on public expenditure is reduced when charitable money is used.

When Almshouses were built before the nineteen sixties they made very few, if any, calls on public money as the buildings were provided by the benefactors and current costs were covered by charitable income. However, since the Housing Act 1974 which gave specific financial support to the sheltered housing schemes of Housing Associations, there has been almost no incentive to autonomous agencies to provide the capital cost of such schemes. Organizations such as the British Legion, Help the Aged (now Anchor) and the Jane Cameron Trust (who decided to work through Hanover) now can raise all the necessary capital costs from Housing Association Grants and use their own funds for additional amenities for tenants or for quite different purposes.

Almost all the money for new sheltered housing schemes now comes from public funds. The financial assistance, which they receive, is very similar to that received by local authorities though the grants and subsidies come from different sources or have different names. For capital costs, the Department of the Environment's Housing Association Grant, which pays a proportion of the Housing Association's capital costs, is very similar to the same department's payment of sixty-six per cent of the loan charges incurred on local authority sheltered housing. Local authority running costs deficits are met from the rates and central government rate support grants, whereas Housing Association deficits (unless caused by maladministration) are covered by revenue deficit grants from the Department of the Environment or by welfare grants from Local Authorities, which in their turn come out of rate income.

- (2) A higher proportion of the cost is paid by people who can afford it as most Housing Associations charge a "fair rent" plus, in a few cases, a service charge, the total of which may be higher than the rents charged for similar accommodation by local authorities.

Comparative^{ly} well off people thus pay higher rents and less well off people can apply for rent and service charge allowances as part of their supplementary pensions.

It is likely that the differences between fair rents and local authority rents will gradually diminish as Housing Associations agitate for higher grants (so that their rents can get more in line with local authority rents) and pressure is put on the Government to raise local authority rents up to "fair rents" levels.

- (3) A better quality of building and services can be provided.

Housing Associations (except North Eastern) are allowed to build to a higher standard than local authorities, providing that the extra money comes from the Housing Association's own funds, and they can also subsidize social activities for tenants. Whilst most of the extras provided in this way are appreciated by the tenants, it is questionable whether this is a good use of the limited amount of money from voluntary sources which is available for the care of the elderly. The tenants are already in a privileged position and as the cost allowances are sufficient to meet a reasonable standard of provision the extra money is used on what might be considered "frills" such as hairdressing and hobbies rooms, greenhouses and good quality carpets in the corridors. Better use of the money might occur if the money was used to provide help for other elderly people, such as those who are lonely, unable to cope with increasing frailty or those who are living in poor housing. Whilst each Housing Association must spend the money it has been given on its schemes, it is questionable whether they should develop their fund raising activities beyond the need to raise money for worthwhile experiments for which no other finance is available.

Local authorities can, if they wish, also provide extras for their tenants out of the rate fund. The most usual assistance are highly subsidized rents and heating charges, but some provide extras like pianos and Christmas trees, hobbies rooms and provide generous allowances for furnishing communal areas.

- (4) Freedom to assist those who, for a variety of reasons, encounter difficulty obtaining council housing.

Housing Associations are usually more willing to accept people who live outside the district in which a scheme is located. This is valuable when elderly people wish to move to a different district, for example, to be near their children, but cannot obtain a council tenancy as they do not have the required residential qualifications. Housing Associations can also offer accommodation to ex-owner occupiers who find it difficult, or impossible, to obtain a council tenancy due to ineligibility or low priority compared with other applicants.

However, in practice there are not very many places for such people: some schemes have tight restrictions on eligibility, for example tenants must be ex-mineworkers or ex-servicemen, or there are residential qualifications as with the "Sir E.D. Walker Homes" and the "Jane Cameron Trust". In many schemes this freedom is restricted as the local authorities have nomination rights over a proportion of the Housing Association's dwellings, one hundred per cent in the case of the North Eastern Housing Association. When Miller (1971) made a survey of Housing Associations he found, when asking about nomination rights :-

"some associations did not object to this curtailment of their freedom but others felt not only was it unjustified but that it conflicted with one of their primary aims - to house people who could not be helped by local authorities."

Page (1971a) in her research on Housing Associations asked local authorities and Housing Associations what they felt to be the role of the latter. She concluded :-

"The flexibility of Housing Associations in their letting policy to deal with needy cases - where the authority is not always able to help - is their most generally accepted advantage over local authorities."

However, the Cullingworth Report (1969) recommended no old person should be ineligible for council housing on the grounds of lack of residential qualifications and several of the districts in Durham have no restrictions at all concerning residence.

- (5) Pressure on local authority waiting lists is reduced.

The extra provision by Housing Associations in a district may reduce the time that people spend on the local authority waiting list. Miller (1971) commented :-

"The value of the contribution of Housing Associations is much more obvious in the areas with the worst housing problems, which tend to be the larger authorities. Here, the Housing Associations can often relieve the authority of cases which, despite their urgency, do not qualify for the council's help for one reason or another. In this kind of situation there can be no doubt that Associations are supplementing the work of the authority. In areas where there was less pressure, on the other hand, there was a greater tendency for the authority to feel that housing associations represented an unnecessary duplication of effort, especially when lack of expertise or experience meant that they had to be 'nursed at all material points' by the authority."

Page (1971a) asked local authorities what they considered the role of Housing Associations to be :-

"Over half felt that the main role of Housing Associations was to complement provision by local authorities. By this they usually meant housing for special groups rather than general needs. Only about a quarter (27%) saw them as supplementing local authority provision by providing for general needs."

The role of Housing Associations is still rather unclear; for, whilst both major political parties support the Housing Association movement, they consider it to have different aims.

^e
Harlow et alia (1974) wrote :-

Underscore

"the housing association dwellings were often considered by the Conservatives as an alternative to further 'soulless' council blocks. Many Labour controlled boroughs have however continued to support the Associations because of the additional help and resources it was felt they could bring to the relief of housing problems.

"This political ambiguity in the reasons for the encouragement of Housing Associations has been reflected in their activities. As a result it has never been clear whether they should be housing those in need who would normally look to the local authority, or housing those categories such as the single students or the homeless, whom a pressurized local authority with a long waiting list could not hope to cater for."

In Durham the major role of the Housing Associations in providing sheltered housing appeared to be that of supplementing the work of local authorities by providing extra dwellings for applicants similar to those eligible for local authority schemes.

As only certain types of people are eligible for accommodation in some Housing Associations schemes there is the danger that tenancies in schemes run by autonomous agencies may be given to people with relatively low levels of need compared with other elderly people in the community or on local authority waiting lists. In addition the more aware applicants may put their name down on several waiting lists and get accepted by one of them earlier than someone else who needs the accommodation more but does not realise the schemes in his area are administered by different organizations. Even where local authorities have one hundred per cent nomination rights, the Housing Associations have the power of veto and can reject nominees. As Housing Associations cannot run at a loss they tend to put considerable emphasis on a satisfactory record of rent payments and on sociability and cleanliness, although by selecting only the "best" tenants they may cause an unbalanced population in local authority schemes. This differentiation may be heightened where the "fair rent" is higher than local authority rents, for those with a low income may feel unable to apply for a dwelling with, what appears to them, a high rent if they are not aware of the rent allowances for which they might be eligible.

- (6) Housing Associations may have more experience of building, and management of, sheltered housing.

The Associations which specialise in sheltered housing acquire an extensive knowledge of the needs and problems associated with sheltered housing, for example Anchor has published a book giving very detailed instructions to architects (1974) and both Anchor and Hanover have commissioned research to learn more of the views of their tenants.

As their management staff often deal only with sheltered housing they are able to specialise in that field whereas for local authority officers sheltered housing is usually only one aspect of their work. In addition, in local authorities sheltered housing is dealt with by councillors and officials involved with the planning, architects, housing, maintenance and treasurer's department and knowledge and planning may be fragmented. Sometimes the County Social Services Department and the Medical Officer of Health are also involved. However, local authorities and autonomous bodies vary in their skills of managing sheltered housing. For example, Derek Fox, a former adviser to the Department of the Environment on housing wrote in 1971 :-

"It is true to say that throughout the Housing Association movement there is the best and worst of housing management. Good voluntary management inspired by idealism can at times surpass the professional standard encumbered by its nine to six, five day week approach and by its inability to meet known needs because of inhibitions of establishment. On the other hand, voluntary management can be spasmodic, and can even cease to all intents and purposes, if the idealism dies or finds other openings for its enthusiasm. It can suffer from an excess of paternalism, can at times be even more restrictive in its outlook and clientele than local authorities, and may be difficult to keep its objectives and methods up to date: it can also be expensive if it has only one small scheme or is spread out in several small schemes hundreds of miles apart."

Housing Associations in Durham tended to be more aware of the true cost of their schemes as they had to prepare detailed accounts in support of grant and subsidy applications while local authorities were not under any such obligations and therefore occasionally neglected to produce detailed costings.

In one District there was no heading at all for the costs of sheltered housing in the annual accounts. In several Districts no information was readily available on debt charges or rent income of sheltered housing schemes and no detailed costs were prepared before councillors approved new schemes.

Housing Associations tend to have fairly definite policies on what they wish to provide in their schemes. These are based on their own research and experience and on that of other Associations. In contrast, the designs of local authority schemes appear to be much more influenced by the whims of individual officers and councillors who may have a limited knowledge of the alternatives available to them in their decision making. However, the freedom of choice exercised by the Districts may be advantageous at times in that designs may be flexible to meet local needs and usually both Category I and II schemes are provided.

In the past some of the smaller Districts relied on the North Eastern Housing Association to provide the specialist knowledge needed to build sheltered housing schemes in their area. Now the local authorities have experience of managing their own schemes, some resent the North Eastern's continued presence in their area as they have to finance any deficit on schemes over which they do not have full control. There has been pressure on the Government to create new legislation to hand over these properties to the local authorities but so far this suggestion has been resisted, in contrast to the position with New Town Development Corporations.

There does not seem to be so much resentment towards other Associations, as most of them make no call on local authority finance. The only one that does, the Durham Aged Mineworkers Homes Association, enjoys considerable sympathy, as Durham is traditionally a mining county and quite a number of Councillors are miners or ex-miners.

- (7) Extra capital is brought into the areas with the greatest need, for Housing Association Grants are only given if the dwellings are built in areas where there is a shortage of the type of accommodation the Housing Association will provide.

The Housing Association Grant may be higher than the sixty-six per cent debt charges subsidy which the Department of the Environment pays to local authorities and running cost deficits, if met by Revenue Deficit Grants rather than Welfare Grants, are a burden on the national purse rather than local ratepayers.

However only some local authorities welcome Housing Associations in their area while others believe they can build just as good, or better, schemes themselves and resent "outsiders" operating in their area. Housing Association schemes are therefore only likely to be built in areas where they are encouraged and there may be other Districts which would benefit from the provision of extra capital but do not receive it for political reasons. In addition, those authorities which do not value sheltered housing, and therefore have low provision, may not encourage anyone else to build such accommodation as they do not consider that there is a need for it.

In some Districts the North Eastern Housing Association would like to convert many of its old people's accommodation into sheltered housing but the local authority will only agree if the Association undertakes to pay the cost of these services. This in fact blocks the proposals as the local authority sets the rents and unless the authority will increase the rents there is no way of paying for the new service. In a few cases Councillors or officials seem to purposely block improvements in North Eastern schemes, perhaps because they wish their own schemes to appear the best in the District.

- (8) Management by a mix of volunteers and professional employees who are able to respond quickly to changes in the needs of the elderly and give a more personal approach to the care of the elderly.

The Housing Associations feel they have a more personal relationship with tenants and know more of their needs. They are less bound by party political influences and feel freer to experiment with new ideas, though they are limited in their experiments by the need to conform to Government regulations in order to obtain grants and subsidies. However, most housing associations gain experience of only one type of scheme, for example Hanover mainly built "Category I" schemes and Anchor "Category II", whereas most local authorities have a variety of types.

The Councillors are, to some extent, the equivalent of the voluntary managers of Housing Associations and often have a good knowledge of the needs of all the old people in their district, not just those already in sheltered housing. The Councillors have a standing and authority derived from public elections whereas the voluntary managers are appointed and tend to come from the professional and managerial classes. However the managers may be more knowledgeable than some of the Councillors who have spent all their lives in one small district.

The Housing Associations claim their relative small size enables them to have a more personal contact with their tenants and wardens. This was particularly evident in the care given to the interviewing of potential tenants and the appointments of wardens though there was little difference between Housing Associations and local authorities in the proportion who have special officers visiting schemes to support the warden and tenants.

(9) Freedom to initiate new forms of management.

Almshouses first provided sheltered housing and the idea was later taken up by local authorities and Housing Associations. Housing Associations are less tied to traditional patterns of management, although they are limited to some extent in what they can do as regards the need to obtain grants and subsidies.

Anchor are considering ways of providing loan stock sheltered housing through an associated company, Guardian Housing (see page 106) and of involving tenants more in the management of schemes. Some local authorities and Housing Associations are working on ways of enabling very frail tenants to stay in sheltered housing who would otherwise have to go into an old person's hostel. Local authorities alone are in the position of experimenting with ways of bringing the advantages of sheltered housing to old people living in scattered dwellings in the community.

- (10) Housing Associations provide an alternative form of accommodation to owner occupation and local authority housing and help to replace the fading functions of the private landlord.

The provision of the "third arm" of housing may be ideologically desirable in that it decentralises power in the allocation of housing. This is particularly important for sheltered housing in County Durham as there are no owner occupied sheltered housing. Yet some people may not wish to live in local authority dwellings or may not be considered as in need of such accommodation.

The disadvantage of this recent decentralization of power is that large sums of public money are given to autonomous agencies in the form of Housing Association Grants and yet there are few checks on the managers to ensure that the schemes are being managed in the way it was intended.

Some people consider these grants as attempts to nationalise Housing Associations yet there are not the same controls, rightly or wrongly, that are exercised over other agencies receiving such large sums of public money.

It is unlikely/^{that} money for sheltered housing schemes is misused but a Yorkshire Television Film "Goodbye Longfellow Road" shown on 8th March 1977 alleged that some Housing Associations, funded by the Greater London Council, were charging homeless people exorbitant rents for squalid housing. A report on one of these Associations had been referred to the Director of Public Prosecutions eight months previously and after the programme much concern was expressed at the lack of supervision of public money which goes to Housing Associations.

Conclusion

It would appear that in the Durham area, the current provision of sheltered housing by Housing Associations is very similar, in many ways, to that of local authorities. The actual buildings and services are similar and many of the advantages claimed for Housing Associations are in practice not as great as they may appear. As there are no clear guidelines or directives from central government on the purpose and organization of sheltered housing schemes, local authorities, as well as Housing Associations, are able to experiment with new ideas. The financial arrangements of schemes are technically different but in practice for typical tenants who are in receipt of a supplementary pension, the respective costs of sheltered housing accommodation to the public purse are almost identical. The charges are merely paid in different proportions by the Department of the Environment, Local Authorities and the Department of Health and Social Security.

Chapter 8FUTURE PROVISION OF SHELTERED HOUSING

The service of sheltered housing to elderly people is generally considered to be successful, although it is not always clear whether this success is considered to be related mainly to the satisfaction it provides to elderly people or because of the way it is believed to reduce the pressure on other health and welfare services.

Much encouragement is given to local authorities to provide this type of housing, for example, the Department of the Environment's Consultative Paper Housing for Old People (1976). This encouragement is relevant where provision is low, but as the number of dwellings increases, there is a need to consider optimum levels of provision. Great thought needs to be given to the level which is appropriate for each District and when, if ever, Districts should stop building this type of accommodation or give it very low priority compared with other forms. Although sheltered housing is in demand, as are most welfare services, all calls on public expenditure must be balanced. It would be wrong to provide expensive sheltered housing to people in little need of it if there is not enough money to provide good care and support for, for example, the young physically handicapped.

Unlike many welfare services there are no guidelines to local authorities on the number of sheltered housing dwellings to provide and there has been very little discussion of factors which should be considered when plans are being made for the care of elderly people.

Views on optimal levels of provision of sheltered housing vary greatly for they are influenced by many factors such as the aims for which such housing is intended, the expectations of different groups, the provision of other services for the elderly and competing financial demands. Bradshaw (1972) however suggests a taxonomy of social need which provides a useful framework for discussing levels of provision. He suggests four kinds of need: felt, expressed, normative and comparative.

Felt need This is equated with want and is assessed by asking people if they feel that they need a service.

In the Durham Household Survey (1974) people living alone were asked:

"In some places older people live in sheltered housing. They have their own home but there is a warden nearby who keeps an eye on things. If you had a choice, would you prefer to live as you are or in sheltered housing?"

Of those living alone, and not already in sheltered housing, thirty-six per cent said that they would prefer this type of accommodation.

However, in order to estimate the percentage of elderly people living alone who would like sheltered housing, it is necessary to include those already in this type of housing. No exact figures are available for these calculations, but table 22 is an attempt to make an estimate. It suggests around fifty-four per cent of people living alone would welcome sheltered housing.

Table 22Sheltered Housing Requirement in County Durham, 1974

1.	Estimated number of elderly persons living alone. *	22294	
2.	Single persons already in sheltered housing, assuming 7 in 10 dwellings single occupied.	6264	
3.	Single persons not in sheltered housing.	16030	
4.	Percentage requiring such accommodation (36% of 3)	5771	
5.	Single people in or requiring sheltered housing (Lines 2 + 4).	12035	= 54% of single people.

When analysis is made for men and women, thirty-four per cent of men and thirty-six per cent of women living alone would have liked to move into sheltered housing. Since the average age of single women is likely to be higher than that of men (there are nearly twice as many women than men over seventy-five) these findings suggest that women are more able, or more willing, to manage longer on their own.

Demand from couples and single people living with others must also be taken into account. The author had the opportunity to ask the identical question to that used in the Durham Household Survey in a survey carried out by Darlington District Council on their tenants. The results showed that of such households containing elderly people, nineteen per cent would have liked sheltered housing. (This compares with the earlier survey of single elderly people where thirty-six per cent wished this form of housing.) Again, the findings are of limited value, as only local authority tenants were interviewed.

* Based on population living alone as shown in 1971 Census. Figure adjusted to take account of boundary changes.

In addition any findings based on only one question about desire for sheltered housing are limited. Much depends on a knowledge and personal experience of such schemes and on the conditions under which people would move, for example, "only if it is near my old home", "only if it is a bungalow". Any policy based on desire and demand needs to look at the reasons why elderly people would avail themselves of the service. They may think that they would like the service when responding to a survey or when joining a waiting list, when really they only want a few of the service benefits: good quality housing, a better location or ready access to a warden when needed. Others may express a desire for sheltered housing because they like the idea of the free laundry, the warden service, television for five pence a year or the ease of attending social events, chiropody sessions and luncheon clubs. Others may feel that they might as well take advantage of a service which is no more expensive than independent elderly people's housing. Some may choose sheltered housing as a means of freeing capital. Factors such as these may well lead to an inappropriate demand for a high level of provision.

Demand may also be related to provision. The more dwellings available, the fewer people there are wanting such accommodation but unable to get it. Alternatively, the more dwellings provided, the more people know of such schemes and may desire a place. Analysis of the Durham Household Survey findings showed no significant relationship between these factors. In most Districts, demand was less in those with high provision, yet Sedgefield, with the highest provision, also had the highest unmet demand.

Expressed need Expressed need is 'felt' need turned into action and in the case of sheltered housing is reflected by waiting lists.

Most Districts used statistics on housing waiting lists as a basis for assessing unmet need and choosing the location of any new scheme. Most aimed to provide for all 'expressed' need for sheltered housing, a policy which differs from those relating to the majority of other welfare services.

The majority of people on local authority waiting lists for sheltered housing were already in council housing but wished a different form of accommodation. Most Districts did not keep separate lists for 'independent' elderly person's dwellings and sheltered housing, and the researcher was unable to obtain details of the 'expressed' need for sheltered housing. However, the combined need for elderly person's accommodation usually composed around a third of all requests for council housing.

Waiting lists are a useful guide to 'need' in an area but are limited as, at any given time, they contain the names of a number of people who no longer wish such accommodation, have died or moved away. When provision is based on 'expressed' need there is the danger that the people with initiative and ability will request places and not those in the greatest need. An isolated elderly person with no friends may never hear of sheltered housing or may feel it is not for him as he may not want to be supervised by anyone. This may be particularly so when the schemes are referred to as "warden-controlled schemes".

People may not feel or express a need for sheltered housing until they learn that it is available at little or no extra cost to themselves. It is interesting, and perhaps significant, that despite the popularity of local authority sheltered housing there appears to be no expressed demand in the owner-occupier market. The reason for this is not known but it is possible many people only want certain aspects of sheltered housing, and owner-occupiers find these easier to obtain, for example, well-designed small dwellings in a convenient location. No owner-occupier sheltered housing existed in Durham and the organizations providing such accommodation in other parts of the country, mainly the Guardian Housing Association Limited and Retirement Homes Limited, have only a small number of schemes.

One alarm company, Davies Safety Alarms, found a similar situation with emergency alarms for elderly people when they advertised such systems, linked to a manned centre. Whilst alarms are widely provided for elderly people in local authority dwellings, owner-occupiers appeared to be uninterested in such schemes, or the ability to call help in an emergency has low priority if the service has to be paid for.

Normative need 'Normative' need is that which the expert or professional, administrator or social scientist defines as 'need' in any given situation. A 'desirable' standard is laid down and compared with the standard that actually exists. If an individual or group falls short of the desirable standard they are identified as being in need.

District Councillors and officials varied greatly in their views on desirable standards. One District felt a desirable level had been reached though providing places for only two per cent of its elderly people, whereas the District with over twenty-nine per cent of its elderly people in sheltered housing aimed to provide many more schemes. Similar variations were found by an Age Concern survey in 1973 when sixty randomly selected local authorities were asked to estimate the proportion of elderly people on their housing lists who might require warden-assisted grouped housing. The replies showed estimates ranging from less than ten per cent (the lowest category) to one hundred per cent.

Most Districts in Durham had no ideal number of dwellings they were aiming to provide, they just knew they wanted more. The Department of the Environment has provided no guidelines on levels of provision although is encouraging local authorities to provide more of this type of dwelling, for example, Housing for Old People, A Consultative Paper, 1976.

It is likely that decisions will not be taken only on strict criteria based on the "need" for the service but also for reasons such as the status high provision provides for the District, the votes gained by councillors when they show, in an overt way, that they care about the elderly and their personal perceptions on the needs of the elderly.

Davis et alia (1971) found that decisions on welfare services were also related to party politics :-

"The proportion of seats held by the Labour Party seems to have an independent impact on authorities' per capita spending (and therefore on the priorities they devote to spending on welfare services) and on other aspects of standards."

authors?

A fascinating study, Ageing in Mass Society, Myths and Realities (1977) asked elderly people about their lives and younger people what they thought the lives of elderly people were like. The findings showed great differences between the younger people's views and the experiences of the elderly people. The under sixty-fives greatly overestimated the loneliness, poor housing, poverty and lack of feeling needed actually experienced by elderly people. In Britain national charities publicize the worst living conditions of elderly people in order to obtain money or offers of help but the advertisements may be harmful in that they create an artificial view of the lives of the majority of elderly people. Younger people may develop very false views about old age and provide unnecessary or inappropriate services. This point is, however, recognized by some charities and in its report on the role of the warden, Age Concern wrote :-

"Any report on some aspects of the services for the elderly always runs the risk of appearing to suggest that 'old age' is a problem for everyone and that all elderly people are in need of help. This view must at once be formally rejected: the majority of old people are well able to manage (except perhaps in cases of serious or terminal illness) in the community alongside their neighbours and relations and for them special housing with warden service or the residential home will not be necessary. Furthermore the number of elderly needing accommodation in grouped schemes is only a small minority of the elderly population."

Comparative need By this definition a measure of need is obtained by studying the characteristics of the population in receipt of a service. If there are people with similar characteristics not in receipt of a service, then they are in need.

This concept is difficult to apply with sheltered housing for, if it is believed a proportion of tenants should be fit and active in order to keep the warden's work load down then, any elderly person, whether fit or frail, can be considered in need. If the number of elderly people in sheltered housing, as a proportion of all elderly people per District, is used as the basis then many people in areas with low provision are in "comparative need".

Comparisons can be dangerous in that everyone is encouraged to provide many services in order to emulate the high providers, whereas alternative forms of support might be more beneficial.

If the provision in every District was brought up to the level of that of Sedgefield (the highest) with 29.3 dwellings per 100 elderly population, then in Durham anything up to 10,000 extra dwellings would be required even before allowance is made for increased population. The combined net cost to the public purse in County Durham alone would be around 30 million per annum.*

* Based on 1976 prices of an average cost of £32 per dwelling per week for 19,000 dwellings.)

Even if current provision is considered about right, if comparative levels of provision are to remain in a constant relationship to the number of elderly people in the population, account must be taken of the increasing number of elderly people.

Between 1976 and 1991 the number of people in Durham County over sixty-five is expected to rise by 6.3%. When this projection is broken down by age group, the number between sixty-five and seventy-four years of age is expected to drop, whereas, the number of those seventy-five and over will increase sharply.

Table 22

Durham County Population Projections

	<u>1976</u>	<u>1991</u>	<u>Increase/ Decrease</u>
65 - 74	56 171	53 979	- 3.9%
75 +	28 920	36 465	+ 26.1%
Total	85 091	90 444	+ 6.3%

Source: Durham County Council Population Projections.

If provision was evenly distributed across the population aged sixty-five and over, to keep provision at its current level, an additional five hundred and thirty-six dwellings would be required in the next fifteen years. However, if sheltered housing is seen as being primarily for the most elderly, then a much larger number of dwellings will be required to keep up with current levels of provision.

Several counties are now planning the provision of services by obtaining information about the characteristics of elderly people, for example physical and mental condition, degree of dependency, housing condition, whether living alone and planning care according to the number of people falling into predetermined categories. People in the same category would be expected to require the same services. For example, if it is decided sheltered housing should be provided for all people over sixty-five years, living alone, and with a physical handicap, it can be ascertained around twenty-six * per cent of such people live alone (Census 1971, Durham County Report) and around forty per cent have appreciable or severe physical or mental handicaps (Harris, 1971, Townsend and Wedderburn, 1965, Durham Household Survey, 1976) and new surveys could show the extent of overlap. However, such schemes are of limited value as they are rarely sensitive enough to take account of all relevant factors, for example, level of support from relatives and friends, ability to cope with adverse situations, despite sheltered housing. However, they do give planners some guide to the characteristics of the people for whom they are planning and allow some comparisons to be made between the characteristics of existing tenants and those on the waiting list.

Not only has the level of provision to be decided but also the type of scheme to be provided. A decision is normally taken to provide either "Category II" blocks of flats or "Category I" bungalows (or flats) with or without communal facilities.

* It should be noted that twenty-six per cent of all persons over pensionable age in Durham live alone, but the figure rises to forty-six per cent when consideration is given to just one and two person households where all inhabitants are over pensionable age.

The Districts vary in their preferences. Some build only bungalows, others only blocks and some a mixture of both. Where there is only one type built, experience is only gained of that type, and as each type can work successfully there may be little incentive to try any other form.

On the whole, the Districts with the most schemes preferred bungalows although this may partly be due to their experience of the success of this type of sheltered housing due to their policies of converting all existing old people's dwellings into sheltered housing.

It is easy to suggest that a mixture of types should be provided but this is not necessarily realistic for schemes are purposely distributed geographically in order to allow as many people as possible to live near their old home, and the type most suitable in one village may also be the most suitable in another. Both blocks of flats and separate bungalows have their supporters and tenants appear to be happy with whichever form they are in. However, overall, most wardens and housing managers interviewed considered bungalow schemes to be the most successful.

The researcher found a number of policy-makers outside Durham, and many authors of books or articles on sheltered housing, do not consider bungalow schemes to be "real" sheltered housing nor do they appear to be aware of the success of the ways in which they can be run.

The main advantages of bungalows are increased opportunities for privacy, greater space, lack of stairs, little discomfort from noise, and increased opportunities for interaction with the rest of the community, for example, tenants can watch passers-by from their window or stand at their door and talk to people going past. The fear that tenants would be isolated in winter or not able to use the communal facilities readily unless they could be reached by enclosed corridors, as in the blocks, did not appear to be a problem for almost all tenants.

There is, however, a place for blocks of flats, for location is very important and where a small site in a good location becomes available it may be better to build flats to house a larger number of tenants than would be possible if the land was used for bungalows. Flats are therefore likely to be suitable for town centres, and schemes can be built with several floors in order to allow many tenants to live near shops and social activities.

Originally "Category I" bungalows were intended for old people of the more active kind and "Category II" flats for tenants with restricted mobility. (Ministry of Housing and Local Government Circular 82/69.) However, this distinction does not work well because the fit elderly become more frail as they grow older and some of the frail applicants wanted to enter bungalow schemes as these were nearer their old home.

The distinction between the active and frail assumes an almost "conveyor belt" approach where tenants are expected to move from one dwelling to another, and finally on to an old person's hostel, as their physical condition deteriorates.

An example of this "conveyor belt" approach is given in the following extract :-

"The distinction between ageing and aged persons may very well be helpful when allocating flatted houses. The upper floors, inaccessible to the aged person may yet be within the capacity of the ageing person and through time, when vacancies occur, transition from upper to lower flats can be arranged."
(Smith, 1966.)

Most policy-makers are now aware of the need to make all accommodation for the elderly suitable for the very frail in order that tenants can stay in the same dwelling until they die, unless they are some of the few people who need to transfer to a hostel or hospital.

Unless blocks are to be used to provide an intensive form of care (see page 17), it may be unfortunate that such rigid distinction as far as mandatory design requirements are concerned, exist between bungalow schemes and blocks of flats.

The Scottish Development Department, who supervise sheltered housing in Scotland are aware of this problem and in December 1975 abolished the distinction between "Category I and II" schemes. (Scottish Development Department Circular 120/1975.) The Department felt that the mandatory features in "Category II" schemes, such as heated corridors and laundry, were not essential and that their high cost deterred many local authorities and housing associations from making this form of provision.

The circular therefore announced that a warden service was the only requirement for sheltered housing and that, although optional features could be provided in any combination, their inclusion would have to be justified to the Department during the planning stages. It was anticipated that only a small proportion of future schemes would incorporate all the options.

The Department hoped that the new flexibility would encourage more sheltered housing to be built and allow the form of schemes to vary according to the character of the area.

"For example, a sheltered housing development in a remote rural area might well comprise a few single storey dwellings located here and there throughout the community, but all within a reasonable distance from the warden's house. In urban areas sheltered accommodation could be provided in terraced houses or in blocks of flats."

In addition to the type of dwelling which should be provided, consideration has to be given to the internal features of each dwelling. Since housing is intended to be suitable for the very frail, it would appear to be sensible to make each dwelling "mobility housing" * as this is inexpensive to provide (the cost yardstick allows £50 for this purpose), allows greater flexibility in letting and benefits to tenants who, in later years, benefit from this form of accommodation. It might also be beneficial to provide some "wheelchair housing",*as sheltered housing can be suitable for elderly people with quite severe physical handicaps.

* A description of these forms of accommodation is given on page 42.

Consideration must also be given to the number of bedrooms provided in each dwelling. Bedsitters were intended for use by the very frail who have difficulty cleaning and do not "need" a larger dwelling. (Ministry of Housing and Local Government Circular 82/69.) In practice, small dwellings may be harder to keep clean and tidy and this type of tenant may benefit from the opportunity of moving into a different room at night more than tenants who are more mobile and can get out to have a change of scenery. A letter in the Journal of the Institute of Social Welfare (1976) described a survey carried out by members of the Essex Warden's Association and stated that :-

"The wardens found that flatlets, particularly single person units*, can turn into a prison for the tenant if he/she cannot get out, particularly the more severely handicapped."
(Case 1976.)

Most housing managers and housing associations said that they found bedsitters difficult to let. It is likely that this form of dwelling will become harder to let, as provision rises and it becomes comparatively easy for applicants to obtain a flat or bungalow. Stone (1970) discussed dwelling size in general and although not writing about sheltered housing, his comments are useful :-

"Because the price of dwellings rises less than proportionately to increases in size, it is not very costly to increase the amount of floor area per dwelling. ... Floor space standards have been rising for at least the last 100 years and are expected to increase with increasing affluence. The provision of generous floor space is probably the cheapest way of reducing the risks of early obsolescence, whilst it also simplifies adaptations."

* In some very early schemes in England a few two person bedsitting rooms were built. SC

Table 9 on page 96 showed one bedroom flats cost eleven per cent more to provide than bedsitters. However, a bungalow with alarm and warden only, was five per cent cheaper than a bedsitter, and bungalows with maximum facilities only three per cent more expensive to provide. In view of the letting problems already experienced, even in Districts with low provision, this type of accommodation may shortly become outdated in the same way that shared bathrooms, intended to make life easier for the very frail, are now rarely built, and shared toilets and bedsitters for two people are no longer allowed.

If bungalows are provided, a decision must be taken as to whether to build some with two bedrooms. Some Districts build all two-bedroomed accommodation but, since very few tenants appear to use the second bedroom, the extra expenditure, in the region of an extra ten per cent, may be wasteful if, by the provision of unnecessary extra bedrooms, many elderly people are excluded from sheltered housing.

Whilst a spare bedroom for visitors may be appreciated, it is not absolutely necessary if a guestroom is provided in the scheme. However, a small number of dwellings are occupied by people who are not married to each other or couples who wish to sleep separately and Districts might provide a number of two bedroom dwellings for these people. The 1971 Census, Durham County Report, showed the following breakdown of one and two person households, where all inhabitants were over pensionable age :-

Table 23Living Arrangements of One and Two Person Households Where All Inhabitants Over Pensionable Age, County Durham

	<u>Mainly Require</u> <u>One Bedroom</u>	<u>May Require</u> <u>Two Bedrooms</u>
	%	%
Living alone	46	
Married couples	38	
Unmarried couples		9
Two persons of same sex	—	<u>7</u>
	<u>?</u> 84	16
	—	—

Some married couples may wish separate bedrooms and some unmarried couples or siblings of the same sex may share a bedroom. However, the table suggests at least sixteen per cent of applicants, including those in blocks of flats, might wish two bedrooms for regular use. In practice, to cater for these people, the number of two-bedroomed dwellings would have to be greater, because the remaining tenants should not be expected to move from such a dwelling when one partner dies. Two-bedroomed bungalows might also be built in localities where the number of elderly people is expected to drop and dwellings might, in future years, be used to house tenants of different ages.

Another important topic to discuss is whether there is an appropriate number of dwellings which should be grouped together to form one scheme. There has been little debate on the ideal size, although planners are aware of the balance to be achieved between having schemes large enough to provide services economically and giving tenants sufficient opportunity to meet like-minded people, and the need to prevent schemes becoming too big and tenants not integrating with other people outside the scheme.

The early schemes were built with around thirty dwellings, probably as this appeared sensible bearing in mind the health of the tenants. This size then became incorporated into official recommendations. The major guidelines on this topic notes :-

"too large suggests segregation from rest of community. One warden = about 30 units maximum. There will generally be social disadvantages if a scheme is much larger than this and larger schemes should not be considered unless they make it possible to provide worthwhile additional amenities such as commercial laundry, shop, club or meals service."

Ministry of Housing and Local Government
Circular 82/69.

A study of sheltered housing by the Institute of Housing Managers in 1967 found that nearly all local authority housing managers were in favour of groups of thirty dwellings although this may have been due to their satisfaction with the size of their current provision and lack of experience of larger schemes. Beyer and Nierstroasz (1967) show that in some countries, especially Finland, Switzerland and the United States of America, large schemes of a hundred or more dwellings for elderly people are common and can be run successfully.

The Circular quoted above, still stands despite the fact that the Department of the Environment (the successor to the Ministry of Housing and Local Government) commissioned a study on the size of sheltered housing (Design Bulletin 31/75) and found that schemes of many different sizes could be successful.

"No particular size of scheme emerged clearly as universally successful nor did the question of size seem to be uppermost in most tenant's minds. Any sized scheme could work well, or badly, depending on a number of factors ... the choice of warden, a well-designed dwelling, a location with easy access to buses, shops and post offices, congenial neighbours, an interesting view, and freedom from excessive noise of traffic and children."

The research found that :-

"The materials used in the finish of internal corridors, the type and amount of lighting in internal corridors, the door furniture, and furnishings in communal areas, all seemed to be much more important in creating a personal atmosphere than the length of corridors or size of blocks."

Tenants' satisfaction remained high even in very large schemes, because when tenants were asked about their overall satisfaction with the schemes and their individual dwellings on a five-point scale (very satisfied, fairly satisfied, no feelings either way, fairly dissatisfied, very dissatisfied) the following findings emerged*:-

<u>Tenants' Overall Satisfaction</u>	<u>24-49 Dwellings</u>	<u>50-99 Dwellings</u>	<u>100 or more Dwellings</u>
Very satisfied with scheme	80%	62%	75%
Very satisfied with dwelling	78%	74%	86%

As a result of the absence of concrete evidence, although the original circular 82/69 was not revised, the Department said it would not reject plans submitted for subsidy approval on the basis of size alone. (Design Bulletin 31 1975.)

* Unfortunately no figures were given for the other points on the scale.

The financial economies, which occurred when larger size schemes were built, were discussed in Chapter 4 and showed a small saving of around five per cent was made when blocks of forty dwellings were built and eight per cent if blocks of fifty were built. Social factors must, however, be taken into account, for it would be wrong to build large schemes /^{because} they were more cheap if they were unsatisfactory in human terms. There is a great fear of grouping too many elderly people together, but it is difficult to know what number becomes "too many" in any given situation and what other factors, such as the density of the surrounding population, affect this number. It is quite possible that the size of schemes could rise from thirty to forty in most localities without any adverse effects on tenants.

Although schemes with around thirty dwellings are successful many factors have changed since the early sheltered housing schemes were built and this "ideal" size developed. The main factors are the development of two-way intercommunication systems, organized systems of relief wardens and the changing characteristics of tenants.

Before two-way intercommunication systems were available, the warden had to walk around visiting each dwelling at least once a day to check that all the tenants were well. With a two-way system, the warden can stay in her home and quickly contact each tenant each morning and during the day with the minimum of time spent between calls. These systems, therefore, save the warden's time which can be used for contacting or supporting other elderly people.

It is now the local authority's responsibility to ensure that a relief warden is employed two days per week and when the warden is ill or on holiday. While there are some problems associated with relief cover, especially where no accommodation is available for the relief warden or no separate alarm indicator board, basically the system seems to work well and wardens can get proper periods of time off-duty. In the past, most wardens did not have regular relief wardens and the constant demands by tenants, every day of the year, must have meant that wardens could assist with a small number of tenants.

The majority of schemes in County Durham had around thirty dwellings, but the size of both local authority and housing association schemes was slowly increasing, for high levels of provision allow many couples and fit elderly people to move into sheltered housing and the average work load per dwelling falls. Districts with high provision are therefore increasing the sizes of their schemes often to about forty dwellings and already there were about a dozen schemes with over seventy dwellings, which the housing managers claimed to work well.

The Department of the Environment's study on the size of schemes (1975) found that although the average number of dwellings per warden was thirty in small schemes (twenty-four to forty-nine dwellings), fifty-one in medium (fifty to ninety-nine dwellings) and eighty-seven in large (one hundred or more dwellings),* only two wardens felt that they had too many tenants to deal with and these were both in medium sized schemes where they had no other resident help.

*A few large schemes had two wardens, thus reducing the average number of dwellings per warden.

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The warden-tenant ratio does affect the amount of time available for each tenant but less time does not necessarily seem to be harmful to the tenants. The Department of the Environment study found that :-

"The wardens in the smaller schemes all saw their tenants every day and had more time for nursing care (though the amount of nursing care also depended upon the qualifications of the warden and what was expected of her). In the larger schemes wardens only visited those tenants who were ill or had problems. ... From the tenants' point of view both arrangements could be equally satisfactory. Most tenants in the medium and large schemes said they saw the warden as often as they wanted to. About a quarter added that, although they saw the warden as frequently as they wanted to, they did not see her often. This did not seem to be criticism but a comment on the fact that they were sufficiently independent not to need to see her more frequently. A handful of tenants in the medium and large schemes said they felt they needed to see the warden more often. ... Almost all tenants in small schemes said they saw the warden as often as they wanted to. There were isolated cases where it seemed to the researchers that such close contact, especially in small schemes where the warden rarely had time off, encouraged overdependence on the warden and occasionally resulted in a situation of conflict between warden and tenant, making all concerned unhappy."

Almost every warden interviewed in Durham felt that the size of her scheme was about right and it is likely that the wardens expand or contract their work to fill up the time available to them. Where limited demands are made on them for practical help, many wardens and relief wardens devote much of their time to organizing social events. Whilst these events are usually appreciated by tenants, they may be a luxury which could be reduced as long as there are elderly people without any form of warden service or living in poor quality housing.

If the wardens were able to support more tenants it is possible that the increased number of tenants might help boost tenant involvement in organizing social events. It is interesting to note that in Durham, where many people attended one hall, there was a greater chance of tenants forming their own social committee to organize events and more interested people available for each activity. In these cases the schemes had many tenants; two schemes shared one hall, or elderly people living nearby, in independent housing, were encouraged to join activities.

The size of a scheme, and the form it takes, should be closely related to the type of area in which it is situated. In isolated areas, small schemes of perhaps half a dozen dwellings may be the most suitable in order that tenants need not move far from their old home. In built-up urban areas, much larger schemes might be beneficial both to the tenants and to the extra people who can receive the service as a result of the economies of size.

The provision of sheltered housing was originally based on the idea that some elderly people were in need of special support and that these people should be brought together and housed in groups of around thirty dwellings. Although the need to balance frail and less frail tenants was appreciated, at least in principle, all tenants were assumed to be at risk in some way and therefore in need of the service.

The schemes have been popular and the justification of the service has partly changed to that of prevention. From this some people are now advocating that sheltered housing should be available to all elderly people. Several Districts accept this as a general aim, at least as far as elderly tenants in local authority dwellings are concerned. Where local authority dwellings have almost all been converted into sheltered housing, thought is now being given to people in privately rented accommodation, and in some cases owner-occupiers, to see if some of the advantages of the service could be given to elderly people in their existing homes.

When provision is considered in such terms it is necessary to reconsider the original form of sheltered housing to see if it is still suitable. The size of schemes was discussed earlier in this light but thought must also be given to the type of warden service provided and the location of dwellings.

When a service is available to all elderly people their requirements might be classified as follows :-

1. Regular need - people who need regular supervision or assistance.¹
2. Occasional need - people who manage adequately except during short periods of illness.²

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1. People who are very afraid of being alone might be included in this category.
 2. Within this category it may be difficult to distinguish those who really need help and those who could manage unaided but take advantage of any warden's services provided.

3. Possible need in the near future
 - elderly people who manage well without help but by virtue of age or other causes might need help within a few years.

4. Assumed future need only
 - people who are fit and healthy and unlikely to need help in the near future. Also included in this group might be people whose relatives and friends are currently providing all necessary support.

These groups are not separate but form a continuum through which tenants may gradually pass, although not necessarily ever reaching the stage of requiring any help at all.

In order to save people moving to different types of accommodation as their level of need changes, a flexible system could be introduced which provides small well-designed housing for all older people who require it, including perhaps people in their fifties and early sixties, but warden service is not provided for those who do not need the service, but may request it as an insurance policy against future need.

A flexible system might consist of a number of well-designed dwellings, possibly associated with a communal hall, all wired so that alarm systems can be added, or removed, at any time.

At the moment two groups of elderly person's dwellings may be located next to each other and although they both contain a number of frail or ill tenants, no services are provided for one group and full warden service to the other. A more flexible system might have provided the same number of dwellings but provided a warden service only to those in regular or occasional need of such a service.

In schemes where there are seventy or eighty dwellings, a flexible system in practice operates for the wardens give services only to those in need of help, but are available to other tenants as required.

It is easy to advocate the warden's supervisory role for all elderly people but it is expensive to provide and may be harmful to the maintenance of a good community spirit where everyone is encouraged to care about his neighbour. It may be harmful to a fit person to be told regularly that society expects him to be dependent on others either then or in the near future.

If well-designed, small dwellings are to be provided for tenants of varying ages, for example, from fifty upwards, where they will be able to stay for the rest of their lives; thought must be given to the location of these dwellings. They can either be all grouped together, dispersed amongst other housing or a mixture of both. Dispersed housing need not be very far from the warden's home and communal hall, but it should provide opportunities for other members of the community to provide some friendship and support for tenants. Alternatively, most dwellings could be grouped together, but with a few dispersed dwellings linked to the scheme available for persons wishing to move to smaller housing at a "young" age, but not wishing to live amongst a group of solely elderly people.

A flexible system might make the service more sensitive to the needs of all people at risk and not just elderly people who are local authority tenants. If the service was easily available, but not provided to anyone not currently in need of it, there might be savings which would allow the service to be extended to some members of other groups, such as the young physically handicapped or chronic sick, who might welcome the service if they experience problems similar to those of the frail elderly people.

There has been some discussion as to whether the County Social Services Department should take over sheltered housing in order that places are given to the most needy and the provision co-ordinated with other services for the elderly. This suggestion has arisen as there have been some problems caused by lack of co-ordination between Districts and Counties. However it is likely that even more problems would arise if the services were ever transferred. As the level of provision rises, and places are available to any particularly needy applicant, the desire by the Social Services Departments to have control over the allocation of tenancies is reduced and the aspects of housing dominate because there is a need to maintain effective liaison between housing for elderly people and that of other sectors of the community.

Rather than alter existing arrangements, the Morris Report on Housing and Social Work (1975) recommended that many of the problems might be overcome if a formal administrative structure for liaison between housing and social work services was established.

The Report also said :-

"The social work department may also be able to give more general advice to the housing authority on how the general social welfare of an area could be improved. ... Social work departments will be interested in such schemes from the preventative point of view, since failures by housing authorities to meet certain needs may result in additional burdens being placed on them. For example, an inadequate provision of sheltered housing might face some elderly people with no alternative but to move into a residential home. We would not wish it to be thought however that only social workers can pronounce on the social implications of housing. Housing departments in particular have a wealth of experience in this field."

Increased liaison between housing departments and all health and welfare services can be beneficial for liaison may lead to more effective and ^{or} ~~more~~ cheap forms of care. At the moment each individual agency aims to provide services as economically for itself as possible, but these arrangements may not be the most efficient when total public expenditure is considered.

The issues relating to the provision of sheltered housing are complex and must always take local conditions and the provision of other services into account. The current research has only considered a few important aspects but it is hoped that the research, by being conducted in an area with a relatively high provision, isolates some of the issues which will become more relevant as the service expands. It is hoped that some of the points raised will prove useful when consideration is being given to alternative forms of care for elderly people and the effect of providing sheltered housing for a large number of elderly people.

Policy-makers must, in the end, base their judgments on their own beliefs and understanding of the service, but if they are aware of how the service changes as the average level of dependence of tenants alters they may prefer to modify some forms of the service.

The service is fairly rigidly defined at the moment, in that the majority of schemes have thirty dwellings and one warden, whereas there are many alternative ways of running the service successfully. The service is also restricted to elderly people who become local authority tenants although nearly all pre-1920 housing (the type that is the most likely to lack a proper damp course, inside toilet or bathroom) is in the hands of owner-occupiers or privately rented.

as to

A decision needs to be made ^{as to} whether to provide an intensive service which provides a great deal of support for a limited number of people, or an extensive service which aims to provide a smaller amount of service for a wider number of people. Blocks of sheltered housing flats, the most common type in England (Attenburrow 1976) provide an intensive service to a small number of people, especially when communal activities are not open to other elderly people in an area. Until such time as local authorities have sufficient good quality housing and personal social services to eliminate the worst cases of poverty, loneliness and hardship during infirmity, it may be fairer to distribute services only to the needy and not to a large number of fit people. Originally, this is exactly what sheltered housing did, but this does not seem to be quite the case now in some areas.

Despite the problems discussed in this thesis, sheltered housing appears to be extremely popular with a large number of elderly people and demand may well increase as more people learn of the service and wish to enjoy the advantages that it offers. Such housing, however, is not required, or even wanted, by many people and it may be wrong to build this type of accommodation for elderly people to the exclusion of any other.

Many documents, for example the Department of the Environment's Consultative Papers, Housing for Old People (1976) and Housing Policy (1977) discuss ways in which the choice of housing for elderly people could be widened, both in the short and long term. It is therefore surprising to find that some District Councils have such enthusiasm for sheltered housing that they aim to provide this service to all their elderly person's accommodation. This means that elderly people who do not wish to remain in a local authority family house or cannot obtain suitable accommodation in the owner-occupier or privately rented market, for whatever reason, will have little choice but to go into local authority sheltered housing, even if they intensely dislike such a service. Since the major housing associations catering for the elderly are also building mainly sheltered housing, this avenue is also closing. It is likely there will always be a considerable number of elderly people who dislike group-living or the idea of the warden watching them and provision must be made for these people.

The Cullingworth report made this important point when it concluded :-

X beware?

"One must be aware of speaking of the 8,750,000 elderly people as if they were a homogeneous group, still less a problem group. ... The elderly differ as much as the non-elderly in their housing conditions, needs and aspirations. And all that we can say on the individuality of people as a whole applies equally to that group which we label 'elderly'. There is therefore no single housing policy - or house allocation system - which can apply to the elderly. Their needs must be assessed with the same care and individual treatment as anyone else. We make this point strongly, because of the ease with which one can step into a single argument that the elderly need independent accommodation, or housing close to relatives, or ground floor accommodation, or housing with a warden system, and so on. Different people want different things." (1969.)

Schemes are built to last over sixty years and thought must be given to the way the service is likely to develop, not just how it exists at the moment. Most Districts in Durham appeared to be aware of many of the changes which are taking place, but at a national level no guidance or information has been provided to assist those Districts which have no experience of providing the service for a large number of people or awareness of the changes that occur as the level of provision increases. Much thought needs to be given to the future of this excellent service in order that it becomes available, in the most suitable form, to those people most able to benefit from the care and support it provides.

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