

Agenda Item No: 6
Overview & Scrutiny: 5 December 2023

Title: HEART

Lead Officer: Lisa Barker lisa.barker@warwickdc.gov.uk

Portfolio Holder: Councillor Paul Wightman

Wards of the District directly affected: All

Approvals required	Date	Name
Portfolio Holder	26/11/2023	Cllr. Wightman
Finance	22/11/2023	Dilip Dabasia
Legal Services	24/11/2023	Kathryn Tebbey
Chief Executive	21/11/2023	Chris Elliott
Director of Climate Change		Dave Barber
Head of Service(s)	Author	Lisa Barker
Section 151 Officer	.../.../2023	Andrew Rollins
Monitoring Officer	23/11/2023	Graham Leach
Leadership Co-ordination Group		
Final decision by this Committee or rec to another Cttee / Council?	Yes	
Contrary to Policy / Budget framework?	No	
Does this report contain exempt info/Confidential? If so, which paragraph(s)?	No	
Does this report relate to a key decision (referred to in the Cabinet Forward Plan)?	No	
Accessibility Checked?	Yes	

Summary

This report provides an update to members in respect of the Home Environment Assessment and Response Teams (HEART) delivery of Disabled Facilities Grants and related services.

Recommendation(s)

- (1)** That the progress to provide one consistent service to deliver Disabled Facilities Grants and a Home Improvement Agency Service for the County be noted.
-

1. Reasons for the Recommendation

- 1.1 Since 2017 the five District and Borough Councils in Warwickshire and the County Council have delivered equipment and adaptations funded by Disabled Facilities Grants (DFG's), addressed housing conditions and provided associated financial support through the HEART. HEART is a shared service hosted by Nuneaton and Bedworth Borough Council (NBBC) and leadership and oversight is secured through the HEART Board, whose membership is formed from all of the Warwickshire District and Boroughs and Warwickshire County Council.
- 1.2 The key function of the HEART Service is to deliver DFG's to fund adaptations and deliver aligned funding and support to enable people to live independently in their own homes. These are typically property adaptations, including stair lifts, level access showers and similar, that enable older or disabled individuals to live in their own homes and avoid admittance to hospital or care facilities as a result of frailty or accident.
- 1.3 The initial HEART Shared Service agreement was set to expire in early 2022, however for a variety of reasons including the disruptions experienced as a result of the COVID-19 pandemic, a 12-month extension was agreed by all authorities, to enable some reflection on the delivery of the service by HEART and to enable the Board to deliver some of the improvements required following the service reviews.
- 1.4 The 12-month extension afforded the opportunity to consider in detail, the two external reviews and enabled progress against the priorities within the HEART Board Strategic Development Plan. There are clear partner expectations and the benefit of improved understanding of the 2021 White Paper for Social Care. The partnership has continued to benefit from specialist input from Foundations to ensure that decisions surrounding the future of this important provision are strategic, well informed and focused on the best interests of residents.
- 1.5 In December 2022 Cabinet approved for a new legal agreement for a five- year partnership be entered into.
- 1.6 Progress this year includes:
- Development of the Strategic Development Plan
 - Implementation of a new ICT system – Civica Cx
 - New Performance report introduced.
 - Introduction of a new Satisfaction Survey

- Agreement on HR processes for HAO Staff.
- Approval of revised Housing Assistance Policy
- Review of Service against best practice guidance
- New 5-year shared service agreement agreed.

1.7 The appendices of the report demonstrate progress and performance over the period as follows:

Appendix 1: HEART Strategic Development Plan 2023-2024

Appendix 2: HEART Annual Report April 22- March 23

Appendix 3: HEART Customer Satisfaction Survey: Report to Heart Board
Tuesday 3 October 2023

Appendix 4: HEART Performance Report Q1 2023/24

2. Alternative Option

2.1 No alternative options are proposed as the report is for information only.

3.0 Legal Implications

3.1 DFG is a mandatory grant and local authorities are legally required to provide help to those who meet the eligibility criteria, regardless of whether the authority has sufficient budgets to meet the requests. The Housing Grants, Construction & Regeneration Act 1996 sets out the purposes for which a DFG can be [provided and this is summarized as the works being necessary and appropriate to meet the needs of the individual, whilst being reasonable and practicable given the age and condition of the property.

3.2 The Regulatory Reform Order 2002 added flexibility to the above as it gave local authorities the power to determine their own policy and use their DFG 'allocation' to provide other forms of assistance to support people in their homes.

3.3 There are no immediate legal implications arising from this report.

4 Financial Services

4.1 There is a permanent established post dedicated to this role at Grade E1 which is currently filled. There is a revenue budget of £44,234 including pension and on-costs to meet the annual costs of the partnership.

4.2 The 2021 Social Care White Paper confirmed the Government's commitment to a national allocation of £570m until 2024-25. In 2021-22 Warwickshire authorities combined DFG allocation was £5,124,786. Nonetheless whilst the Government has committed to consulting on the current allocation formula at the current time there is no guarantee that the Warwickshire authorities' allocations will remain at the same level for the entire award period.

4.3 The HEART project has been established as a countywide shared service and has its own revenue budgets. The capital funding provided to Warwick District Council from central government to provide DFG's is passed directly to the HEART service for the same purpose.

- 4.4 Whilst HEART undertakes the assessment for adaptations in all tenures, DFG's fund private sector adaptations with the Housing Revenue Account covering the costs of adaptations for council tenants.

5 Corporate Strategy

- 5.1 WDC has adopted a Corporate Strategy which sets three strategic aims for the organisation.

- 5.2 Delivering valued, sustainable services:

DFG works enable people to maintain independence and remain safely in their homes.

- 5.3 Low cost, low carbon energy across the district:

There are limited environmental considerations, although the work around housing standards and general health and wellbeing does have regard for a warm and safe home which could include measures such as efficient central heating and appropriate insulation.

- 5.4 Creating vibrant, safe, and healthy communities of the future:

The provision of a holistic and speedy DFG installation is critical to the dignity and independence of those needing this type of adaptation to their home. A good example would be the benefits in terms of reductions in falls by the provision of a stair lift. The DFG programme is considered to be a contributor to improved health and wellbeing as a result of this and the faster an appropriate adaptation is delivered the better in terms of the health and wellbeing of the recipient and their family/carers.

6 Environmental/Climate Change Implications

- 6.1 There are limited environmental considerations, although the work around housing standards and general health and wellbeing does have regard for a warm and safe home which could include measures such as efficient central heating and appropriate insulation.

7 Analysis of the effects on Equality

- 7.1 There are no equality implications to be considered as part of this report although the provision of DFG's enables the quality of life of vulnerable and disabled people to be improved.

8 Data Protection

- 8.1 Not applicable for the purposes of this report

9 Health and Wellbeing

- 9.1 Included under 5.1 – 5.3.

10 Risk Assessment

- 10.1 The most significant weakness within this arrangement is the arm's length nature of partnerships / shared services and consequent distance from operational management that have caused some frustrations around addressing performance issues.

Supporting documents:

HEART Shared Service Partnership 7th December 2022