

Home Adaptations Policy 2024

Private Sector Housing

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Foreword

Having good quality housing is crucial for the health and wellbeing of Shropshire residents, and this policy aims to reduce health inequalities in the area. Research has shown that the condition of people's homes directly affects their health and wellbeing. Poor housing can lead to health problems for residents.

The Housing Health and Well Being Service have both statutory duties and discretionary powers to offer help and assistance to improve private sector housing conditions within the area. The policy has been developed with regard to local, regional and national priorities and available funding.

This document sets out policy guidance of the available financial assistance for home adaptations in Shropshire. The policy will be reviewed annually and amendments to the policy can be approved by the delegated powers held by the Council's Head of Paid Service. Should new grant funds be secured by the Council, the assistance criteria can be approved by the delegated powers held by the Council's Head of Paid Service in consultation with the relevant Portfolio Holder.

All assistance provided through this policy is discretionary and is therefore subject to funding availability.

Introduction

This policy aligns with the Regulatory Reform (Housing Assistance) (England and Wales) Order 2002¹, which introduced a greater flexibility and discretionary power in providing housing assistance and funding to local authorities and applies to any residents living in owner-occupied homes, housing association and private rented tenants. Further information can be found at Appendix ii.

Shropshire Council may only use powers identified within the Regulatory Reform Order (RRO) if there is a published local Housing Assistance policy (Home Adaptations Policy). This policy replaces all previously published Housing Assistance Policies and will apply to all applications from 2024 implementation.

The Housing Grants, Construction, and Regeneration Act 1996¹, with amendments from the Disabled Facilities Grants (Maximum Amounts and Additional Purposes) (England) Order 2008², makes it the council's legal duty to adapt homes for disabled people in accordance with local, regional and national priorities, while considering available funding.

In addition to adhering to Part 1 of the Housing Grants, Construction, and Regeneration Act 1996, which covers mandatory Disabled Facilities Grants (DFG), the council exercises discretionary powers to offer housing assistance and funding beyond the mandatory requirements. This flexibility enables the provision of adaptations for disabled individuals and extends to housing renewal delivery, allowing for various forms of financial and other assistance for improvements and adaptations.

In 2008, the government broadened the reach of the Regulatory Reform (Housing Assistance) Order 2002 to encompass the use of the Disabled Facilities Grants (DFG) funds, allowing authorities to allocate these resources for a broader range of purposes beyond their original scope.

The Government's view is that while responsibility for maintaining privately owned property primarily rests with homeowners, the council recognises circumstances where financial assistance may be necessary for essential repairs or improvements. The legislation allows local authorities to target assistance to those most in need, making the most effective use of limited resources for private sector housing.

¹ [The Regulatory Reform \(Housing Assistance\) \(England and Wales\) Order 2002 \(legislation.gov.uk\)](#)

² [The Disabled Facilities Grants \(Maximum Amounts and Additional Purposes\) \(England\) Order 2008 \(legislation.gov.uk\)](#)

Legislative Framework

Shropshire Council Housing Services operates within a legal framework that encompasses both statutory duties and discretionary powers aimed at enhancing private sector housing conditions.

This policy addresses the housing needs of disabled individuals, aiming to promote independent living. It aligns with the Housing Act 2004³, which introduced the Housing Health and Safety Rating System⁴ (HHSRS) to establish minimum standards for housing. The Act also mandates action if serious hazards (Category 1) are found in dwellings, emphasising the importance of good housing standards for health and wellbeing.

The Department for Local Government and Communities further established the standard for Decent Homes in 2006⁵, specifying minimum requirements for housing quality, repair, facilities, and thermal comfort. Ensuring good housing standards is crucial for addressing health and wellbeing inequalities.

The Care Act 2014⁶ states that local authorities must provide services and facilities that help people live independently. The core purpose of adult care and support is to assist individuals in achieving their personal goals. The “wellbeing principle” is central to this act, emphasising the importance of promoting wellbeing and independent living. To fulfil the Care Act, Shropshire Council must provide practical assistance, such as home adaptations, community equipment and comprehensive guidance on housing (which includes adaptations of properties), care and financial choices. This Act aligns with the Disabled Facilities Grant guidance of 2022⁷, which mandates assistance provision by social care authorities, even if housing authorities cannot fully approve or fund applications.

The Chronically Sick and Disabled Persons Act 1970⁸ Section 2 continues to apply to disabled children and young people and places a strong duty on social services in relation to adaptations, along with the Housing Grants, Construction and Regeneration Act 1996. This duty arises where Shropshire Council has assessed the need for specific adaptations.

Moreover, under section 343 of the Armed Forces Act 2006 (as amended by section 8 of the Armed Forces Act 2021⁹), Shropshire Council must consider the Armed Forces Covenant when allocating funding, with special consideration for veterans in certain circumstances.

³ [The Housing Act 2004 \(Commencement No. 11\) \(England and Wales\) Order 2008 \(legislation.gov.uk\)](#)

⁴ [Housing health and safety rating system \(HHSRS\): guidance for landlords and property-related professionals - GOV.UK \(www.gov.uk\)](#)

⁵ [COVER \(publishing.service.gov.uk\)](#)

⁶ [Care Act 2014 \(legislation.gov.uk\)](#)

⁷ [Disabled Facilities Grant \(DFG\) delivery: Guidance for Local Authorities in England \(publishing.service.gov.uk\)](#)

⁸ [Chronically Sick and Disabled Persons Act 1970 \(legislation.gov.uk\)](#)

⁹ [Armed Forces Act 2021 \(legislation.gov.uk\)](#)

The Equality Act 2010¹⁰ provides definitions (section 100) of those who qualify, by reason of disability for assistance in carrying adaptations through a Disabled Facilities Grant. For these purposes a person is disabled if:¹¹

- their sight, hearing or speech is substantially impaired;
- they have a mental disorder or impairment of any kind; or
- they are physically substantially disabled by illness, injury, impairment present since birth, or otherwise.

The Disabled Facilities Grant (DFG) delivery: guidance for local authorities in England¹² states that where the social care authority determines that a need has been established it is its duty to assist, even where the housing authority is unable to approve or fully fund an application.

This Policy integrates various legal frameworks and wider elements to ensure comprehensive housing assistance and improvement strategies, addressing the diverse needs of the community while upholding legal obligations and promoting wellbeing.

Alignment with Key Council Strategies and Plans

This policy does not work in isolation and should be considered together with other related strategies and plans to form a comprehensive approach to improving homes. The Home Adaptations Policy aligns with several key Council strategies and plans, supporting their main priorities and goals. Here are the main documents it aligns with:

- [Shropshire Plan 2022-2025](#)
- [Adopted Local Plan](#) and in the future the emerging Shropshire Local Plan¹³
- [Shropshire Council Housing Strategy 2020 – 2025](#)
- [Shropshire Council Allocations Policy and Scheme](#)
- [Private Rented Sector Housing Enforcement Policy](#)
- [Shropshire Council Strategic Housing Market Assessment](#) – part 1
- [Shropshire Council Strategic Housing Market Assessment](#) – part 2
- [Shropshire 2022-2027 Joint Health and Wellbeing Strategy \(JHWBS\)](#)
- [People Directorate strategic plan for 2024 – 2027](#)

Better Care Fund Plan

Housing, social services departments and the National Health Service (NHS) are delivering increasingly integrated services for vulnerable households that recognise the benefits of enabling people to stay in their own homes wherever possible. Poor housing can be a barrier for older and disabled people, contributing to immobility, social exclusion, ill health and depression.

¹⁰ [Equality Act 2010 \(legislation.gov.uk\)](#)

¹¹ [dfg-good-practice-guide-10-september.pdf](#)

¹² [Disabled Facilities Grant \(DFG\) delivery: Guidance for local authorities in England - GOV.UK \(www.gov.uk\)](#)

¹³ <https://www.shropshire.gov.uk/media/21100/sd002-draft-shropshire-local-plan.pdf>

The draft Home Adaptations policy compliments the Better Care Fund Plan and enables people to live with greater independence in secure, safe, well-maintained, warm and suitable housing.

The Better Care Fund (BCF) is a Department of Health initiative that combines health and social care budgets between local authorities and the Integrated Care Boards (ICB) to enhance outcomes, increase joint working and furthering integration of health and social care. An element of this funding is provided to local authorities to finance the various types of aids and adaptations. Representatives from Shropshire Council, as part of the Integrated Care Boards (ICB) play a role in ensuring these resources are effectively utilised to benefit the community.

By providing a more flexible grant funding process, this policy supports a joined-up approach, integrating with local social and healthcare strategies by providing tailored housing solutions, working across teams, for example housing, public health commissioners and adult social care, local integrated health care board (ICB) commissioners and other local partners to benefit disabled, older and vulnerable residents in Shropshire.

Local context

We have clear evidence showing the need for assistance in Shropshire. The information presented here gives an overview of key factors that influenced the development of this policy.

In Shropshire, 153,000 people are in employment (2023)¹⁴ with a large employment base in low paid sectors (care, retail, hospitality) and pay is less than the national average. This policy is designed to be accessible for households facing financial difficulties.

The population of people over 65 is expected to increase significantly, particularly among those aged 85 and older. Shropshire's projected increase in population between 2022 and 2030 is expected to rise by 8.4%, with our older demographic growing at an accelerated pace. Projections indicate a substantial rise of 24.2% in the 65 plus population, whilst individuals aged 80 and above are projected to increase by 33.6%¹⁵

These demographic trends demonstrate the pressing need to address the housing and care requirements of the older population, many of whom are asset rich, but still struggle to afford to heat their homes and afford the increasing cost of food. Homes that are not suitable for their needs can affect their independence, health, and wellbeing, increasing the risk of falls. Many older individuals suffer from dementia, and this policy includes low-cost changes to homes that can help them maintain independence and assist their caregivers. The goal is to prevent hospital stays and costly health and social care interventions.

¹⁴ ONS Annual population survey year ending September 2023

¹⁵ Source: 2022 MYE and 208 population projections.

Health

In response to the 2021 Census, 16,445 people in Shropshire indicated that they were in bad or very bad health. Using the age- standardised proportions to allow comparisons, 4.5% of Shropshire's population were in bad or very bad health, which is similar to the regional average and slightly lower than the national figure 5.3%. Almost 24,375 people in Shropshire (7.5% of the population) said that their day-to-day activities were limited a lot and 11.0% (35,615) said their day-to-day activities were limited a little. When comparing with England (using age standardised proportions) Shropshire had a lower proportion of residents who said that their day-to-day activities were limited a lot, 6.5% compared to 7.5% in England and 8.0% in the West Midlands. In Shropshire 16.9% (59,990) people described themselves as disabled under the Equality Act¹⁶

This policy aims to address the connection between housing conditions, social care, and health. By providing adaptations for disabled people, we can help them live safely and independently in their homes. Additionally, we will work to reduce serious hazards in homes that could cause accidents and health problems, which, in turn, would increase the demand for social care services.

Assessing Housing Options to Maximise Independent Living in the Community for Disabled People

Ensuring the promotion of independence within the community for individuals is a key priority for Shropshire Council. It is important that at the earliest stage, after contacting the Council for assistance, that individuals are engaged in discussions around how best both their short and longer-term needs can be met. Several key partners are available to offer support and guidance and may be able to assist with this process:

- Shropshire Council's Private Sector Housing Grants Officers
- Shropshire Council's Occupational Therapists and Social Workers
- Shropshire Council's Internal Home Improvement Service; incorporating Case Workers and Technical Officers
- Registered Social Landlords
- Private Landlords
- Shropshire Disability Network can provide advice on appropriate Voluntary Groups

There are a few options which can be explored where a disabled person is experiencing difficulties in their home. Whilst adapting the home remains a viable solution, it may not always be the most suitable option in the short term or long term. Therefore, it is crucial to consider a range of alternatives alongside the possibility of major adaptations.

¹⁶ [Nomis - Official Census and Labour Market Statistics - Nomis - Official Census and Labour Market Statistics \(nomisweb.co.uk\)](https://www.nomisweb.co.uk)

Equipment and Minor Adaptations

The provision of equipment or minor adaptations e.g., grab rails can often assist disabled people in meeting their needs. Occupational Therapists will not make referrals for major adaptations where a disabled person's needs can be met through the provision of equipment or minor adaptations.

Moving to more suitable accommodation

Shropshire Council works closely with partners with the aim of optimising the opportunities for re-housing people with disabilities in properties which either have appropriate adaptations in place which meet the individuals housing need or can be easily adapted to meet that need. Social Landlords have individual policies regarding financial assistance to support tenants with such moves. Shropshire Council's [Housing Allocations Policy and Scheme](#) supports this aim.

Adaptations

In cases where a disabled person's individual needs cannot be met through equipment, minor adaptations or moving to more suitable accommodation it may be appropriate to consider the possibility of carrying out adaptations to their existing home. For those opting to self-fund such adaptations, advice and support are accessible from both Occupational Therapists and the Council's Home Improvement Service. This support encompasses various aspects, including adaptation, drafting plans, contractor selection and overseeing the works. Please note that this service incurs a fee.

Council Home Improvement Service

The Council offers a Home Improvement (H.I.) Service which will manage the works or adaptation project on behalf of the applicant. This includes the design and tendering of plans, appointing a contractor (subject to the applicant's approval), applying for planning and/or building control permissions, agreeing commencement date with the applicant and the contractor. Once works have started the contractor will be responsible for all aspects of the works carried out on site, however, if any issues arise during the installation the H.I. Service can assist the client and resolve any problems.

If during the grant process an applicant decides they no longer wish to use the services of the H.I. Service, they **may** be responsible for paying back any reasonable cost incurred by the H.I. Service up to that point.

Non-Home Improvement Service Application

If an applicant chooses to not use the services of the Council's H.I. Service, they must follow the steps as outlined in the non H.I. Service pack which will be provided. The applicant must provide drawings of the proposed adaptations, and these must have been approved by the Occupational Therapist before you obtain quotes. The applicant must obtain a minimum of two itemised competitive quotes and only for the work that has been identified as needed by the Occupational Therapist.

If a relative of the applicant provides the quotations, the grant will be approved for the cost of the materials only. The applicant will be responsible for the cost of labour.

The grant will only cover the lowest price quotation, but applicants will retain the right to choose their own contractor providing:

- The contractor is qualified and suitably experienced to undertake the works required
- The contractor provides a suitable quotation in accordance with the required works.
- The applicant funds any additional costs

Once the application is approved formally in writing, the applicant can contact the contractor to arrange a start date. Work should not commence until Planning and/or Building Regulation approval is in place, or confirmation that the work is confirmed as exempt otherwise the grant may not be paid.

As part of the grant conditions, the works must be completed within 12 months from formal approval and must be carried out by one of the contractors whose estimate were submitted with the application. The contract for the works remains between the applicant and contractor.

Where an architect, structural engineer etc. is required the applicant will be responsible for engaging their services. However, the Council must approve the estimated fees for such services before the grant is approved.

Social Services Funding and Assistance

The Council also has a duty under the Care Act 2014 and the Chronically Sick and Disabled Persons Act 1970 to assist Disabled People in need of assistance which can include the need to carry out alterations to their home. The Care Act repealed the Chronically Sick etc. Act.

General Information about Funding Assistance and Grants.

Central government funding for Major Adaptations Grants in England was set to be £573 million in 2023/24 and to remain at this level in the next financial year and on 4 April 2023, an additional £102 million was announced as a capital top up. The grants are administered by local authorities (in England) and are aimed at enabling eligible disabled individuals to continue to live safely and independently at home through adaptations.

- Funds will be prioritised due to limited resources.
- Financial assistance is only available for properties which are located within the boundaries of Shropshire Council Local Authority.
- The Council will attach specific conditions to funding and tell applicants what these conditions are before it gives an approval for a particular funding stream.
- The Council will not accept financial assistance applications from the owners or occupants of commercial premises, such as hotels, guest houses, care homes, nursing homes or properties owned by the Council.

Major Adaptations Grant (MAG)

The Major Adaptations Grant supersedes the previous mandatory Disabled Facilities Grant (DFG), meaning the DFG is no longer provided by the Local Authority. While the MAG closely aligns with the DFG legislation and its conditions, it enhances certain aspects, including considerations for the maximum grant funding and means testing, to provide fairer financial assistance for home adaptations.

Where there is a disabled person in a household, in many circumstances local authorities have a mandatory duty to offer a Major Adaptations Grant (MAG) to assist with the cost of adaptation work. The proposed adaptation works must be **necessary** and **appropriate** and **reasonable** and **practicable**. This decision rests with Housing Services in consultation with the Social Care Teams.

This assistance is provided, in accordance with statute. It is subject to a maximum grant limit of **£100,000**, for adaptations to facilitate better access into and around the home and for essential provisions within it for the disabled applicant and his or her family. This maximum grant will be reduced by the assessed client contribution. All works will be carried out in the most cost-effective manner to meet the disabled person's needs.

An applicant must be:

- a) The owner or tenant of the dwelling requiring adaptation. A landlord may apply on behalf of a tenant, or;
- b) The owner or tenant of a houseboat or caravan requiring adaptation. A landlord may apply on behalf of a tenant.

Before a grant can be considered, an assessment and subsequent referral must have been made by an Occupational Therapist, (normally from Shropshire Council) detailing the needs of the disabled person. If the service user has enlisted the service of a private Occupational Therapist and submitted plans, then these will be seen and agreed by an Occupational Therapist in the Local Authority.

Major Adaptations Grant (MAG) are means-tested for adults but not children. The disabled person (and, where applicable, their partner or other person) will be subject to the means test, except in the case of adaptations for children and young persons as defined in the Act. Any contributions made by the applicant towards the cost of works under this type of grant will be taken into account with regard to any future application.

Major Adaptations Grants will become a Local Land Charge and are subject to an indefinite condition period from the certified date, during which the following applies: -

- Where a grant exceeds £20,000, and the Council considers it reasonable to do so, repayment of grant money exceeding £20,000 may be required where the property is disposed of by sale, assignment, transfer or otherwise. The value of grant, which may be recovered, may not exceed £30,000.
- Where works for which a grant is paid are also the subject of an insurance claim or legal claim against another person, the applicant is required to take reasonable steps to pursue that claim and repay the grant out of the proceeds. In the event of a breach, the Council may demand repayment of the appropriate part of the grant with compound interest.
- The applicant is required to notify the Council if, and as soon as, any specialised equipment provided under the grant is no longer needed. The Council may choose to recover the unwanted specialised equipment by prior written notice and will make good any damage caused to the property by recovery.

Tenants of Registered Social Landlords (i.e., Housing Associations) should contact their landlord in the first instance so that the landlord can consider funding the work themselves.

The Council's housing stock is managed by its Arms-Length Management Organisation (ALMO) Shropshire Towns and Rural (STAR) Housing. Council tenants who require major adaptations will be assessed in terms of whether the dwelling can be adapted, the cost of the adaptation and the availability of alternative accommodation.

The Council works in partnership with Housing Associations in the area and funding equivalent to a Major Adaptations Grant may be provided through alternative mechanisms.

Major Adaptations Grant Prioritisation - Priority Pointing

If an Occupational Therapist determines that it is appropriate to make a referral for an adaptation a Priority Pointing assessment will also be undertaken.

Priority Pointing is aimed at ensuring that the limited resources available for mandatory financial assistance are targeted at those people in greatest need.

Major Adaptation Grant Priority Pointing is an assessment process, which aims to identify and evaluate the level of need, risk, and urgency by taking into account the following:

- the reason why the adaptation is required
- the mobility of the disabled person and their ability to move around their existing home and access the facilities within
- the risk to their health and safety should the adaptation be delayed or not carried out
- whether the person is a child, or a young person aged under 18 years
- whether or not previous adaptations have been carried out, which partially meet their current needs
- the length of time that the person has been waiting for the adaptation

This approach has been used extensively in other local authorities across the country. Both the Audit Commission and Local Government Ombudsman have recognised the need for such approaches where resources are limited.

Further details regarding the current Major Adaptations Grant (MAG) Prioritisation - Priority Pointing scheme can be found in **Appendix iii**.

Major Adaptations Grant (MAG) Eligible Works

Shropshire Council officers who administer financial assistance, have agreed that under Regulatory Reform (Housing Assistance) (England and Wales) Order 2002 the following adaptation works can generally be considered for a financial assistance, but only where the works are considered to be **necessary and appropriate** for the needs of the disabled person and it is **reasonable and practicable** to carry the works out in the disabled person's home.

Eligible works may include:

- a. facilitating access by the disabled occupant to and from the dwelling or the building in which the dwelling or as the case may be flat is situated;
- b. making the dwelling or building safe for the disabled occupant and other persons residing with him;
- c. facilitating access by the disabled occupant to a room used or usable as the principal family room;
- d. facilitating access by the disabled occupant to or providing for the disabled occupant a room used or usable for sleeping;

- e. facilitating access by the disabled occupant to or providing for the disabled occupant a room in which there is a lavatory or facilitating the use by the disabled occupant of such a facility;
- f. facilitating access by the disabled occupant to or providing for the disabled occupant a room in which there is a bath or shower or facilitating the use by the disabled occupant of such a facility;
- g. facilitating access by the disabled occupant to or providing for the disabled occupant a room in which there is a wash hand basin or facilitating the use by the disabled occupant of such a facility;
- h. facilitating the preparation and cooking of food by the disabled occupant;
- i. improving any heating system in the dwelling to meet the needs of the disabled occupant or if there is no existing heating system in the dwelling or any such system is unsuitable for use by the disabled occupant providing a heating system suitable to meet his needs;
- j. facilitating the use by the disabled occupant of a source of power, light or heat by altering the position of one or more means of access to or control of that source or by providing additional means of control;
- k. facilitating access and movement by the disabled occupant around the dwelling in order to enable him to care for a person who is normally resident in the dwelling and is in need of such care;
- l. facilitating access to and from a garden by a disabled occupant
- m. making access to a garden safe for a disabled occupant
- n. such other purposes as may be specified by order of the Secretary of State.

Alternative Works

Where an applicant wishes to carry out an alternative scheme of works to those being proposed by the Council as meeting the needs of the disabled person, the grant will be limited to the costs of the lesser scheme. This grant may be used towards the costs of a preferred scheme providing that scheme is agreed by the Council as meeting the needs of the disabled person.

Property Conditions

Regard will be given to the age, condition, and layout of the property to determine whether an adaptation is reasonable and practicable. An inspection under the Housing, Health and Safety Rating System may be necessary (**Appendix iv**). If during the course of carrying out adaptation works, it becomes apparent that works of repair or improvement are required in order to enable the adaptation to be completed e.g., the condition of the electrical installation, then access to grant funding will only be made available when the property owner has carried out all remedial works to a satisfactory standard. Landlords will always be deemed responsible for the condition of their tenant's properties.

Additional Assistance

Shropshire Council may provide the following discretionary assistance:

- Relocation Grant
- Major Adaptation Grant Equipment (MAGe)

The availability of this assistance will be subject to the Council's annual budget setting procedure and is offered at the Council's discretion and the framework for this is subject to this policy. In approving an application for financial assistance, the Council may require, as a condition of the assistance, that the eligible works are carried out in accordance with any specification they decide to impose.

If the work for which financial assistance is paid is also the subject of an insurance or legal claim against another person, it is a condition of assistance that throughout a period of **five years** from the certified date the applicant is required to take reasonable steps to pursue any relevant claim and to repay the financial assistance given, so far as is appropriate, out of the proceeds of such a claim. In the event of a breach of the above condition, the Council may demand repayment of the appropriate part of the financial assistance with compound interest.

It is a condition of any application for assistance that the applicant shall notify the Council if, and as soon as, any specialised equipment provided under the funding is no longer needed. The Council **may** choose to recover the unwanted specialised equipment by prior written notice and will make good any damage caused to the property by the recovery.

It is a condition of financial assistance that the eligible works are carried out within **twelve months** from the date of approval of the application. This period may, however, be extended by the Council if they think fit, particularly where they are satisfied that the eligible works cannot be, or could not have been, carried out without carrying out other works which could not have been reasonably foreseen when the application was made.

Relocation Grant

This assistance will normally only be available once in any 5-year period for owner-occupiers or tenants of Private Landlords who are eligible for a Disabled Facilities Grant. (Social Landlords have individual arrangements in place to assist their tenants with moving to more suitable accommodation). The grant will be awarded only in cases where relocation to a property more suitable for the applicant or the applicant's family is considered as a cost effective or practical alternative to awarding a Disabled Facilities Grant or where an existing home is unsuitable for adaptation.

The amount of financial assistance will be subject to the standard Major Adaptations Grant means test and up to a maximum of £8,000.

Where both a Relocation Grant and Major Adaptation Grant are being awarded and a contribution is required under the means test, the contribution towards the Relocation Grant will be deducted from any contribution required under the means test for the Major Adaptations Grant.

The Relocation Grant is awarded to cover expenditure which may be incurred during a house move such as removal costs, estate agent's fees, solicitor's fees, and stamp duty.

The suitability of an applicant's new home will be assessed by the Council. If the property is outside of the Council's administrative area, the property will be assessed by the relevant Local Authority. Although the new property may require some further adaptation to suit the applicant's needs, it must require a demonstrably lower level of work than the applicant's existing home.

The applicant, together with any joint owner will be required to agree to a legal charge being placed on the property/land, or any other form of security as deemed appropriate in order to ensure repayment of the assistance. The Relocation Grant must be repaid to the local authority in full when the assistance recipient disposes of the property in respect of which the funding was given.

Major Adaptation Grant [equipment] (MAGe)

A Major Adaptation Grant [equipment] is a discretionary grant and is available for the **installation** or **replacement** of a major piece of adaptation equipment, e.g., stair lift. It is **not** a grant to repair any already installed pieces of equipment. The primary objective of this grant is to avoid the need for immediate care packages or admission to a care facility due to the lengthy process of the Major Adaptation Grant.

Referral for this assistance is made via the Occupational Therapy Team and, if the referral is for a replacement piece of equipment, it **must** be accompanied by a relevant engineer's report confirming the existing piece of equipment is unsafe and beyond repair. Assistance can also be sought if a person is to be imminently discharged from hospital/care facility but the lack of required major equipment is delaying the planned discharge.

Each referral will be dealt with on a 'case-by-case' basis and any exceptions to the above will be deliberated by the Private Sector Housing Manager.

Financial eligibility for the MAG and MAGE

Financial eligibility to the grant is based solely on an individual or couple's amount of capital. Income and expenditure are disregarded. Capital includes but is not limited to; bank accounts, stocks, shares, cash, additional properties other than their main residence, bonds, and notional capital (unclaimed inheritance, inappropriately spent and or gifted money). Capital that is not counted includes but is not limited to; business assets, compensation, life assurance, life insurance, personal possessions, and home property (main residence).

- If the person for whom the grant will benefit [Relevant Person] and their partner's (if applicable) capital is below £20,000, they will receive the grant and not have to contribute towards the works.
- If the Relevant Person (and their partner) is in receipt on any benefits, they can 'passport' the process of providing their capital information, therefore, they will receive the grant and not have to contribute towards the works. If the Relevant Person (and their partner's) capital is above £100,000, they will not receive financial assistance via the grant.
- If the Relevant Person (and their partner's) capital is between £20,000 and £100,000, they may receive a grant but will be expected to contribute towards the cost of the works.

Removal of Grant Funded Equipment and Related Items

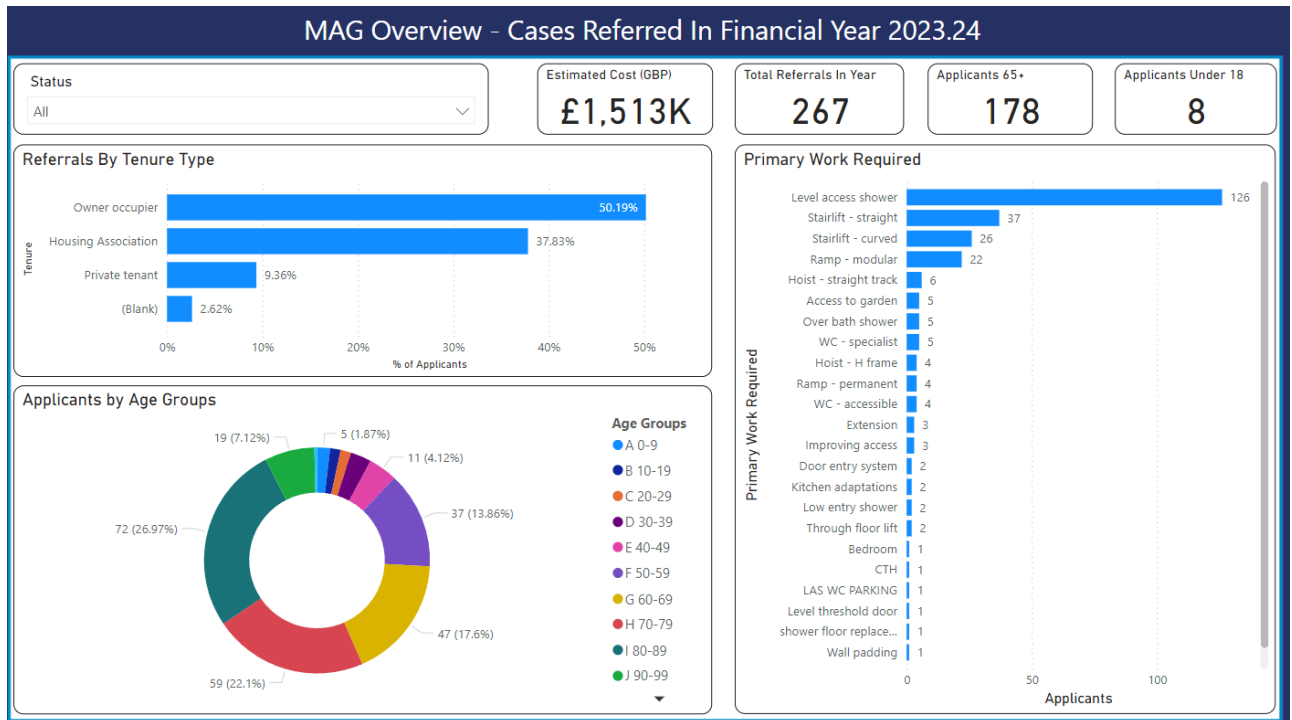
Lifts and similar equipment provided through a grant is the property and responsibility of the applicant / property owner (not the Council). The Council **may**, however, choose to exercise its power through grant conditions to recover specialist equipment in some circumstances. The discretion to arrange for and fund removal of MAG and related works rests with the Council.

There is no statutory obligation for the Council to arrange or fund this work; however, it will aim to provide advice as to Partner Agencies or companies who may be able to assist. Any subsequent agreement between the homeowner and contractor is a private matter.

The Council reserves the right to make minor amendments to the eligibility criteria, level of grant or assistance. Should new grant funds be secured by the Council for the delivery of housing related assistance that is not covered by this policy, the assistance criteria can be approved by the delegated powers held by the Council's Head of Paid Service in consultation with the relevant Portfolio Holder.

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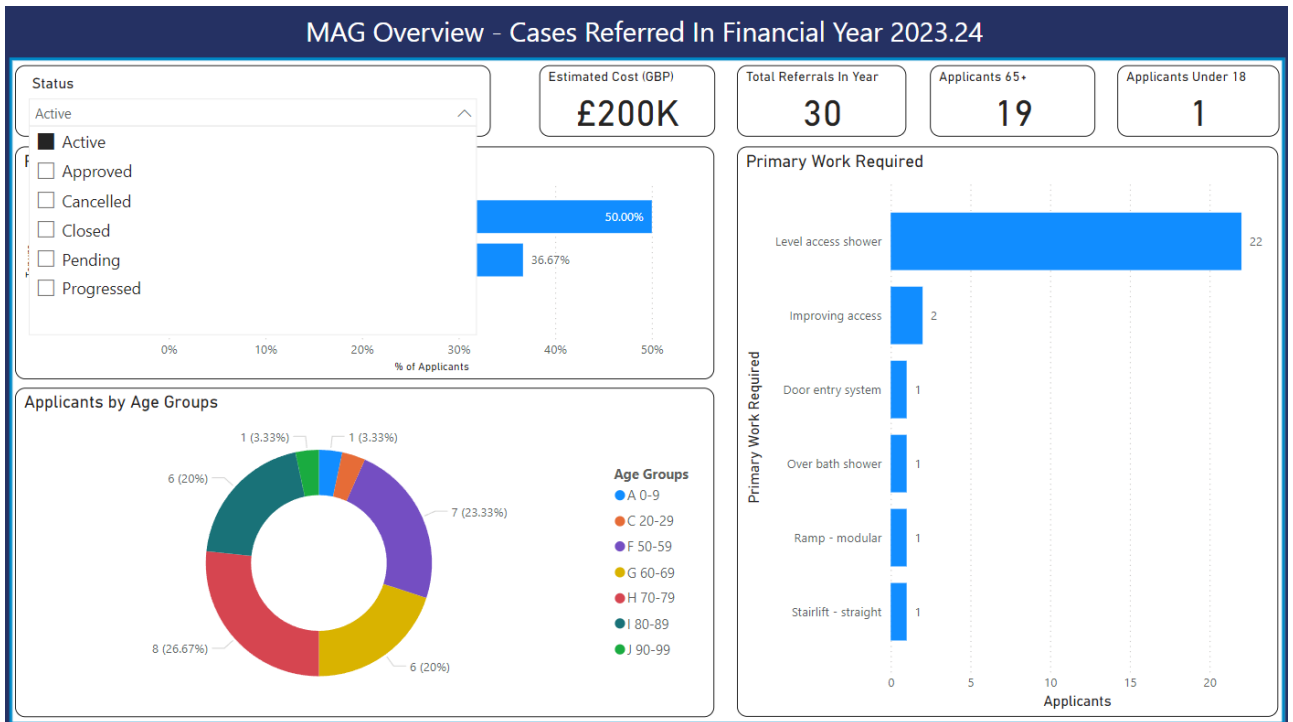
Major Adaptations Grant – All cases referred in financial year 2023/24



Source: Shropshire Council Power Bi

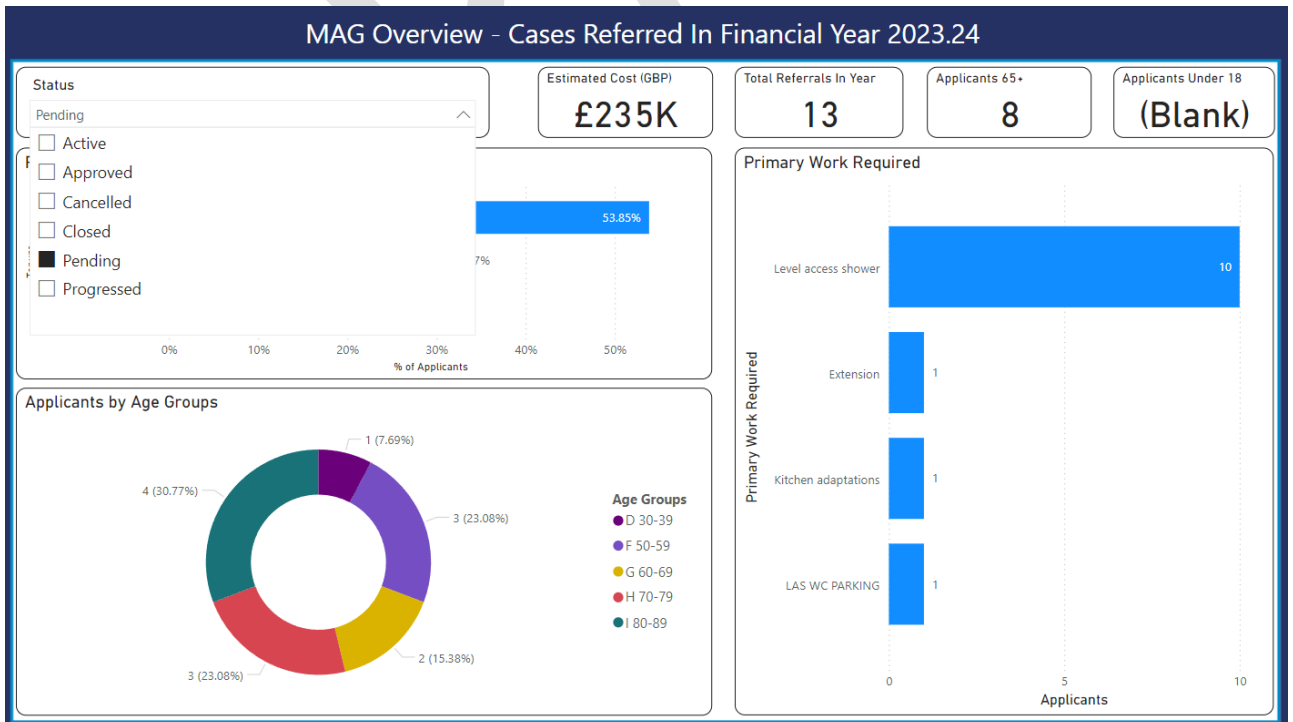
Private Sector Housing

Major Adaptations Overview – all active cases referred in financial year 2023/24. Active cases are where people are financially eligible and are awaiting availability from the Caseworker or Technical officers.



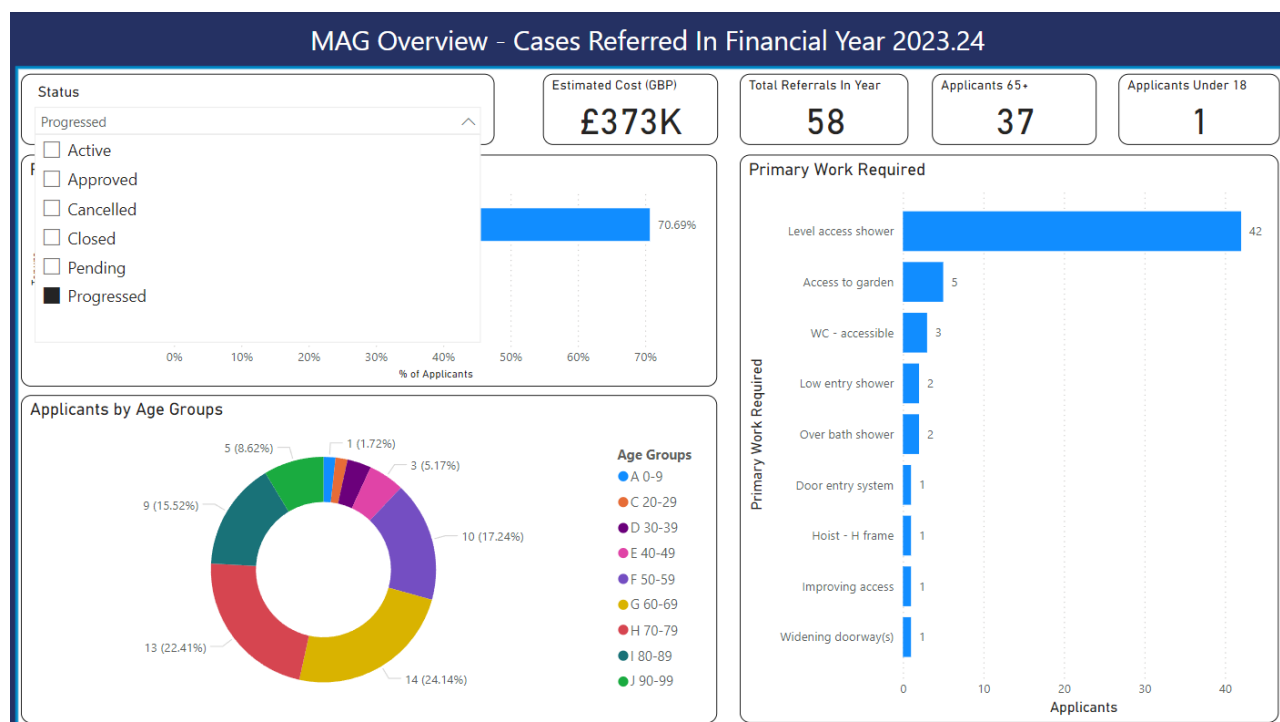
Source: Shropshire Council Power Bi

Major Adaptations Grant overview for all pending referrals in financial year 2023/24. Pending cases are awaiting to be assessed for financial eligibility.



Source: Shropshire Council Power Bi

Major Adaptations Grant Overview of progressed cases in financial year 2023-2024. Progressed cases are in the stages between approval and completed works.



Source: Shropshire Council Power BI

Equality and Diversity

The Home Adaptations Policy complies with the law and addresses all the “protected characteristics” outlined in the Equalities Act 2010. We will apply this policy fairly and give equality of opportunity and experience regardless of age, disability, gender, sexual orientation, transgender status/gender reassignment, race and religion/belief.

All members, employees and agents of the Council must seek to eliminate discrimination and promote equality and good relations between all groups. Information on Equality, diversity and social inclusion can be found on the council’s website at [Equality, diversity and social inclusion | Shropshire Council](#).

We want to improve the lives of everyone in Shropshire and ensure that people have a safe and suitable home so that they can live independently in their current home for as long as possible. This policy is particularly relevant for anyone who has a disability or long-term condition.

General Conditions

During any condition period, applicants for any form of assistance must provide reasonable information on request of the Council or will be deemed to have contravened those conditions.

Administrative Fees

When making an application for assistance, applicants who utilise the Council's Home Improvement Service will incur an administrative fee. For every major adaptation a fee is charged to cover the costs of the service provided. This fee is to support the project management of the adaptation from design to completion.

The administrative fee is inclusive of the total amount of the adaptation and is therefore included within any grant funding. All fees will be outlined to you as part of the application process.

The fee is incorporated into the total cost of the works and is to be paid as part of the funding assistance as per the Housing Renewal Grants (Services and Charges) Order 1996.

Local Land Charge

A Local Land Charge is a restriction or prohibition imposed on a particular piece of land to secure the payment of a sum of money. This charge is binding on successive owners and occupiers of the land. Local Land Charges placed onto a land as a result of Council financial assistance will not incur any interest charges. Only monies used for eligible assistance works, not including administrative fees, will be placed as a Local Land Charge.

A Local Land Charge that has been imposed as a result of discretionary funding assistance will remain in perpetuity until the property has been sold, transferred, or disposed of.

Where any discretionary funding assistance has been approved in conjunction with a Major Adaptations Grants, all Local Land Charge rules apply according to the conditions given to the assistance type.

Local Land Charges can be removed in the event of the charge being repaid in full to the Council, however, the Council cannot accept instalment payments to reduce the charge.

Appeals and Complaints

Any applicant wishing to appeal against a decision on the provision of financial assistance may appeal in writing to the Private Sector Housing Manager, setting out grounds for appeal. If still dissatisfied, the matter will be referred to the Director of People for a decision.

Should an applicant or potential applicant be dissatisfied with the level of service received, contact should be made with the officer concerned or the Private Sector Housing Manager who will aim to resolve the problem. How to make a complaint is available on [Corporate complaints | Shropshire Council](#)

Arrangements to Implement the Policy

Officers implementing this policy will have regard to current national guidelines and local circumstances. Enforcement will only be undertaken by authorised officers. Only competent and suitably qualified and experienced officers will be so authorised, and their authority will reflect their competence, qualities, and experience.

Policy Amendments

All changes must be approved by the Director of People and Housing in conjunction with the Portfolio Holder for Housing and Assets.

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Appendix II

Policy Framework

Made under The Regulatory Reform (Housing Assistance) (England and Wales) Order 2002.

1. Purpose of Housing Assistance:

- 1.a Subject to prevailing policy and available funding, housing assistance may be offered by Shropshire Council ("the Council") towards the cost of: -
- i. The adaptation of living accommodation, including caravans and houseboats.
 - ii. The acquisition of alternative living accommodation where an existing home is unsuitable for improvement, repair, or adaptation.
 - iii. Other initiatives which support the Council's ambitions and subject to the policy in place at that time.
- 1.b The assistance may be in any form including but not restricted to advice, grants, provision of materials, carrying out works.
- 1.c The Council may specify in detail in the Housing Assistance Policy, the purposes for which applications for assistance are to be invited and may specify different purposes from time to time to reflect current priorities and budgetary constraints.
- 1.d The Council will not normally offer assistance where the work involved could have been covered by insurance.

2. Persons eligible to apply for Housing Assistance:

- 2.a Any person who makes an application for assistance must: -
- i Be no less than 18 years of age at application and
 - ii Live in the dwelling as his or her only or main residence and
 - iii Have an owner's interest in the dwelling, or be tenant or licensee of the dwelling, alone or jointly with others and
 - iv Have an actual or moral obligation to carry out the works in question and have the owner's consent in writing to do so if necessary and
 - v Satisfy such test(s) of financial resources as the Council may impose from time to time, more specifically explained in the Council's Housing Assistance Policy.
 - vi Not have been deemed ineligible by virtue of the Council's prevailing Policy or the Housing Grants, Construction and Regeneration Act 1996 or regulations made under that Act.

1. Except where the applicant is a landlord who intends to let the living accommodation or where the accommodation cannot be occupied until the completion of essential work.
2. Other than an interest by virtue of being a Registered Social Landlord under Part of the Housing Act 1996 or eligibility for such registration.
3. Other than tenants or licensees of Registered Social Landlords.

3. Applications for assistance:

3.a An application for assistance shall be in a form determined by the Council and shall include, unless otherwise stated: -

- i. Full particulars including, where relevant, plans and specifications of the works for which the assistance is sought ("the assisted works.")
- ii. At least two estimates from different contractors covering the cost of carrying out the assisted works, unless the Council, at its discretion, otherwise directs in any particular case. (Alternatively, two estimates for materials to be utilised in carrying out the assisted works where either the applicant or relative is carrying out the works.)
- iii. Particulars of any fees and other charges for which assistance is requested and which relate to the preparation for and the carrying out of the assisted works.
- iv. A declaration, in writing, that the applicant is an owner or a tenant of the dwelling.
- v. Consent in writing from all owners of the dwelling that the works proposed may be carried out. This may be waived in cases which, in the view of the Council, would result in undue hardship.
- vi. If the applicant is the owner of the dwelling(s), an undertaking to repay the grant in the circumstances described at paragraphs 12 and 13 below.

4. Exclusion of works already carried out:

4.a The Council will not approve an application for assistance if the assisted works have been carried out before the application is approved, except: -

- i. Where the work is the subject of a formal Notice served by the Council.
- ii. Where the relevant works have begun but have not been completed, the application may be approved if the Council is satisfied that there was good reason for commencing the works before the application was approved.

- iii. Where the Council decide to approve an application in accordance with this paragraph, it may, with the consent of the applicant, treat the application as varied so that the assisted works do not include any works that are completed.

5. Decision and Notification:

- 5.a The Council will notify an applicant for assistance of its decision whether the application is approved or refused. The notification will be given in writing as soon as is reasonably practicable, and, in any event, not later than six months after the date by which all documents relating to the application were received by the Council.
- 5.2 If the application is approved; the notification will also specify the works which are eligible for assistance, the value of the assistance and the form that the assistance will take.
- 5.3 If the application is refused, the Council will at the same time explain the reasons for the refusal and the procedure for appealing against the decision.
- 5.4 If the Council is satisfied that owing to circumstances beyond the control of the applicant the cost of the assisted works has increased or decreased, it may re-determine the amount of the assistance and notify the applicant accordingly.

6. Supervision of works:

- 6.a Responsibility for the supervision of works rests with the applicant in conjunction with any suitably qualified and indemnified professional adviser or agent he or she may appoint for that purpose.

7. Payment of assistance: conditions as to carrying out of the works:

- 7.a The assistance will only be paid if: -
 - i. The assisted works are completed within twelve months from the date of approval or such further period as the Council may allow.
 - ii. The assisted works are carried out in accordance with such specifications as the Council determine.
 - iii. The assisted works are carried out by one of the contractors whose estimate accompanied the application. This may be varied at the Council's discretion and will normally be only in advance of the commencement of work.
 - iv. The assisted works are executed to the satisfaction of the Council.
 - v. The assisted works are executed to the satisfaction of the applicant.
 - vi. The Council is provided with an acceptable invoice, demand, or receipt for payment for the works and any professional fees or other charges. Paperwork is acceptable only if it contains sufficient detail for the Council to identify in full the works carried out and the price charged

and is *not* given by the applicant or a member of his family unless previously agreed with the Council. In the case of invoices for materials only, payment will only cover materials which have been, at that time, incorporated in the structure.

8. Payment of assistance:

- 8.a The Council may pay the assistance direct to the contractor, either in instalments as work proceeds or in one lump sum following the satisfactory completion of works. Prior to the first payment being made, and at the request of the applicant, the Council may, at its discretion, pay assistance to the applicant him/herself.
- 8.b Where assistance is payable, but the assisted works have not been executed to the satisfaction of the applicant, the Council may, at the applicant's written request, and if they consider it appropriate to do so, withhold payment from the contractor. If they do so, they may make the payment to the applicant instead.
- 8.c The Council will not enter into any form of contract with the contractor, and it will be at the applicant's own discretion to agree any contract with the contractor.

9. Repayment where applicant not entitled to grant:

- 9.a If an application for assistance is approved but it subsequently appears to the Council that the applicant (or, in the case of a joint application, any of the applicants) was not, at the time the application was approved, entitled to assistance of that description, no payment shall be made or, as the case may be, no further instalments shall be paid, and the Council may demand that any payments that have already been made shall be repaid immediately, together with interest at such reasonable rate as the Council may determine from the date on which they were paid until repayment.

10. Conditions for Repayment of Assistance (where applicable):

- 10.a If the applicant is an owner of the dwelling(s) to which the application relates and ceases to be the owner before the works are completed, he/she shall repay to the Council on demand the amount of any assistance that has been paid to him/her.
- 10.b If the applicant is an owner of the dwelling(s) to which the application relates and ceases to be the owner within 5 years, or such other period specified at the time of the grant approval, from the date the works were completed he/she shall, where specified, repay to the Council on demand the amount of assistance that has been paid to him/her.

- 10.c Where the Council has the right to demand repayment but there are extenuating circumstances, it may determine not to demand repayment or to demand a lesser amount.

11. Death of an Applicant:

- 11.a In the event of the death of the applicant before the date of approval of assistance, the application will be treated as withdrawn and no ancillary costs incurred by the applicant in respect of any works will be borne by the Council.
- 11.b In the event of the death of the applicant after the date of approval of the grant or during the course of the works, the Council, at its discretion, may continue to fund a proportion of the assistance to an appropriate interim stage or the full extent of the assistance to completion, at its discretion. The agreed element of costs of any such works and ancillary costs will be paid up to that point in accordance with the terms of the grant approval.
- 11.c In the event of the death of the applicant after the completion of the works the Council will seek repayment from the deceased person's estate if disposal by sale or a change of tenure takes place within the period referred to in conditions 11b above.

12. Additional Conditions:

- 12.a Where the Council approves an application for assistance, it may impose additional conditions, which may include but which shall not be restricted to: -
- i. The applicant making a contribution towards the assisted work.
 - ii. The right of the Council to recover specialised equipment installed in or attached to the living accommodation, when no longer needed.

13. Security for Assistance:

- 13.a Any condition above which creates a liability to repay the assistance shall be secured by way of a local land charge or other mechanism the Council may wish to employ. In any event, assistance due for repayment may be considered a civil debt.
- 13.b The liability to repay any assistance may be discharged at any time by the applicant paying to the Council a sum equal to the amount of the assistance or such lesser sum as the Council may agree.

14. Mandatory Disabled Facilities Grants:

- 14.a Applications for Mandatory Disabled Facilities Grants will continue to be subject to the provisions contained within the Housing Grants, Construction and Regeneration Act 1996, as amended by any subsequent provisions.

15. Exceptions to Policy:

- 15.a In exceptional circumstances, the Council will consider an application falling outside this policy.

16. Interpretation & Definition :

- 16.a **“Caravan”** means : –

- i. A caravan within the meaning of Part 1 of the Caravan Sites and Control of Development Act 1960 (disregarding the amendment made by Section 13(2) of the Caravan Sites Act 1968); and
- ii. Includes any yard, garden, outhouses, and appurtenances belonging to it or usually enjoyed with it.

- 16.b **“Date of certificate of completion”** means the date on which all necessary documentation relating to the financial assistance has been received and ‘deemed complete’ by the Council following the completion of all works covered by the application.

- 16.c **“Extenuating circumstances”** in relation to repayment of assistance may include, but are not restricted to circumstances: -

- i. Where the Council is satisfied that the owner of the property is elderly or infirm, and as a result has disposed of the property in order to move to accommodation which is more suitable for their needs.
- ii. Where the disposal is to provide an annuity income and the person concerned is entitled to continue to occupy the premises as his or her only or main residence.
- iii. Where a property adjustment order or order for the sale of the property has been made in connection with matrimonial proceedings.
- iv. Where the property is disposed of, by a conveyance of the freehold interest or an assignment of the lease and the applicant remains in residence.

- 16.d **“Houseboat”** means a boat or similar structure designed or adapted for use as a place of permanent habitation which: –

- i. Has its main mooring within the area of a single local housing authority
- ii. Is moored in pursuance of a right to that mooring and,
- iii. Is a dwelling for the purposes of Council Tax

iv. and includes any yard, garden, outhouses, and appurtenances belonging to it or usually enjoyed with it.

16.e **“Living accommodation”** has the same definition as “dwelling” and means a building or part of a building occupied or intended to be occupied as a separate dwelling, together with any yard, garden, outhouses, and appurtenances belonging to it or usually enjoyed with it.

16.f **“Owner’s interest”** in relation to any premises, means:-

- i. An estate in fee simple absolute in possession, or
- ii. A term of years absolute of which not less than five remain unexpired whether held by the applicant alone or jointly with others.

16.g **“Registered Social Landlord”** has the same meaning as in Part 1 of the Housing Act 1996.

16.h **“Test of financial resources”** – means a method of calculating a person’s realistic ability to make a contribution towards the costs of works to a property.

Appendix III

Major Adaptations Grant Priority Pointing Information Sheet

Major Adaptations Grant Priority Pointing is an assessment process, which aims to identify and evaluate the level of need, risk, and urgency by taking into account the following:

- the reason why the adaptation is required
- the mobility of the disabled person and their ability to move around their existing home and access the facilities
- the risk to their health and safety should the adaptation be delayed or not carried out
- whether the person is a child, or a young person aged under 18 years
- whether or not previous adaptations have been carried out, which partially meet their current needs
- the length of time that the person has been waiting for the adaptation

By adopting this approach Shropshire Council can ensure that the funding available for Major Adaptations Grant is used to assist those applicants in greatest need.

Who carries out the assessment?

The assessment is carried out by an Occupational Therapist, who will award points for the various elements listed above. The number of points awarded will determine which **Band** the case will be placed in. These bands are:

- Gold – above 70 points
- Silver – 30 to 69 points
- Bronze – 0 to 29 points

Gold band cases will always take priority over silver band cases, and silver band cases will always take priority over bronze cases.

Within the bands, cases are dealt with in point order.

Points are awarded to reflect time waiting. After 6 months have elapsed from the date of registration, an additional 5 points are awarded every month. This ensures that every case can progress through the bands.

Please note that as the register is live, your position can change from one day to the next, as cases with higher points may be added to the register.

What happens after the assessment?

Once the Occupational Therapist has carried out the assessment and awarded the appropriate number of points, he/she will make a **referral** to the Grants Officer. This will outline the needs of the disabled person and may include options of the works to be considered and a summary of the points that have been awarded.

The referral will then be **registered**. The disabled person, and his or her partner, will be expected to complete a Preliminary Means Test to determine whether they will be expected to pay anything towards the cost of the proposed work.

What happens after the referral has been registered?

If eligible for a grant a letter will be sent to the disabled person or to the parent/guardian, in respect of a child or young person, confirming the date that the referral has been registered and the Band awarded. Any queries about the banding should be addressed to the Occupational Therapist who will explain how they arrived at the banding.

In most situations, details of the assessment including details of the banding will then be passed to the H.I. Service Team, who will contact the applicant to arrange for a Caseworker to visit. During this visit the Caseworker can provide advice and guidance on a range of issues e.g., benefits advice and explain how they can help with the Major Adaptations Grant process. Following the Caseworker's visit, the applicant can then decide if they would like to continue to use the Council's H.I. Service or whether they would prefer to engage a private agent to assist them once they have been advised that the case can be progressed.

For tenants of Homes Plus and Connexus details of the assessment of needs and any recommended works including details of the banding will then be passed to your landlord.

How quickly will the Major Adaptations Grant referral be progressed?

Cases will be dealt with in order of priority, those with the highest number of points being dealt with first. Subject to the availability of funding, cases will be passed through from the register for the technical work to commence. Depending on the circumstances the referral will be passed to the Council's H.I. Service team **or** to the applicant's agent (if they have decided not to use the Council's H.I. Services). In the case of a tenant of Homes Plus or Connexus, the case will be passed to their Technical Team. The Major Adaptations Grant referral can then be progressed to the next stage.

This will involve any technical survey work required, drawing up plans, obtaining costs for the work and generally assisting with whatever is required to submit an application for a Major Adaptations Grant to the Grants Officer in the Private Sector Housing Team at the Council.

On receipt of a valid MAG application the Grants Officer will aim to determine the application within a reasonable time frame.

What happens if my circumstances change during the process?

If the disabled person's circumstances change after the Occupational Therapist's assessment, they should contact the Occupational Therapist to discuss.

What happens if someone starts or finishes the work before receiving a formal MAG approval?

Any works which are carried out before formal Major Adaptations Grant approval is issued cannot be paid for through the grant.

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Appendix IV

The Housing, Health and Safety Rating System (HHSRS)

The HHSRS provides an objective framework that Local Authorities must use to assess and rate 29 broad categories of hazard. These are summarised as follows:

- Dampness, excess cold/heat
- Pollutants e.g. Asbestos, Carbon Monoxide, lead
- Lack of space, security or lighting, or excess noise
- Poor hygiene, sanitation, water supply
- Accidents – falls, electric shocks, fires, burns, scalds
- Collisions, explosions, structural collapse

The system provides a means of comparing the risks associated with different types of hazard. Some are slow and insidious in their effect, like dampness and cold, whilst others are quick, such as falls. Some hazards are more likely to result in death, such as carbon monoxide, others are very unlikely to cause death e.g., noise or poor layout of amenities.

When an inspector finds a hazard, two key tests are applied – what is the likelihood of a dangerous occurrence as a result of this hazard in the next 12 months and if there is such an occurrence, what would be the likely outcome. This assessment is based on the risk to the actual, or potential, occupant who is most vulnerable to that risk. Each assessment of a hazard carried out using HHSRS results in a score.

This score is calculated using the following formula:

Risk (likelihood) x Outcome = Numerical Score

The calculation includes a 'weighting' to reflect the more serious outcomes.

Once the score has been decided it is given a banding.

The table below shows the hazard bands:

BAND	HAZARD SCORE RANGE	
A	5,000 or more	CATEGORY 1 HAZARD
B	2,000 to 4,999	
C	1,000 to 1,999	
D	500 to 999	CATEGORY 2 HAZARD
E	200 to 499	
F	100 to 199	
G	50 to 99	
H	20 to 49	
I	10 to 19	
J	9 or less	

If a hazard score falls into Bands A to C, this is classed as a Category 1 hazard. Those rated in Bands D and lower will fall into the residual category, Category 2.

The hazard score does not dictate the action to be taken, but if Councils find a Category 1 hazard in a home, they have a mandatory statutory duty to take the most appropriate action. Where a Category 2 hazard exists, there is no such similar duty; instead, the Act confers a power to take action.

ⁱ [Housing Grants, Construction and Regeneration Act 1996 \(legislation.gov.uk\)](http://legislation.gov.uk)