



## **EUXTON PARISH COUNCIL**

Annual Council Meeting

Thursday, 18 May 2023, 7.15 pm start

Annexe, Euxton PC Community Centre, Wigan Road, Euxton

Dear Councillor

9 May 2023

You are summoned to attend the Annual Full Council Meeting of Euxton Parish Council to consider the items detailed on the attached agenda.

If you are unable to attend please could you submit an apology to the Clerk.

Regards

**Debra Platt**

Clerk to the Council

CLERK

Published: 09/05/23

# EUXTON PARISH COUNCIL



Meeting arrangements: Full Council Meeting

Thursday, 18 May 2023, 7.15 pm start

**Annexe, Euxton PC Community Centre, Wigan Road, Euxton**

## AGENDA

Doc. Ref

1. Election of Council Chairman  
To nominate and elect a Chairperson. To receive the Chair's Declaration of Acceptance of office or, if not received, decide when it shall be received.
2. Election of Vice Chairman
3. Representatives on Committees, Lead Members, Groups and Outside Bodies  
Agree memberships of Committees and representatives
4. Apologies
5. Declarations of Interest and Dispensation Considerations  
Members are reminded of their responsibility to declare any interest in respect of any matters contained or brought up at any point in this meeting, in accordance with the current Code of Conduct. Council will consider dispensation requests.
6. Minutes of Council Meetings  
Approve the signing as a correct record, Full Council of 21 April 2022
7. Public Participation  
Matters brought to the Parish Council by residents. The Chair may limit a member of the public to 3 minutes of speaking in order to ensure the smooth running of the meeting. Overall this section will typically be limited to 20 minutes although the Chair may, at their discretion, extend this.
8. Statutory Business
  - 8.1 Planning - Consider planning report from Lead Member for Planning, approve responses and ratify responses made between meetings or to meet deadlines Item 8.1
  - 8.2 Assistance offered to the Wymott Action Group and confirm Councillor representative Item 8.2
9. Financial Items – as circulated
  - 9.1 Approve Expenditures for this month, and any submitted after the agenda Item 9.1
  - 9.2 Receive financial reports Item 9.2
10. Consultation: Notification of Balshaw Lane Primary converting to Academy circulated to Councillors 2 May 2023 Item 10
11. Policy Review: Communications policy Item 11
12. Policy Review: Retention policy Item 12

Full Council meetings 2023 18 May, 15 June, 20 July, 21 September, 19 October, 16 November

Newsletter deadlines: 08/05/23 for June issue; 07/09/23 for September issue; 09/11/23 for December issue; 07/02/24 for March issue;

*D. Platt*  
CLERK  
Published: 09/05/23

13. Consultation: Chorley Council – Chorley Housing Assistance Policy circulated 4 May 2023 circulated to Councillors 4 May 2023
14. Complaint to be considered in accordance with the Council's complaint policy Item 14
15. Matters for information

*Notify the Chair prior to the meeting starts of any item to be brought up under this section. Only items of information, referral to another authority, or matters offered for consideration at a future meeting can be raised. No legal decisions can be taken.*

## PRIVATE, PART II ITEMS

### Exclusion of Press and Public

Pursuant to section 1(2) of the Public Bodies (Admission to Meetings) Act 1960 and defined in Schedule 12A of the Local Government Act 1972, Part 1 s1-10 (*specifically for this item 1*). It is proposed that, because of the confidential nature of the business to be transacted the press and public are excluded from the forthcoming items of business (*specifically for this item*: Information relating to the financial or business affairs of any particular person (including the authority holding that information) ).

### 16. Personnel Committee

Report from the Personnel Committee meeting on 27 April:

- Uplift in the hourly rates for the Village Caretakers
- Offer an opportunity of employment of an Apprentice

*D. Platt*

CLERK

Published: 09/05/23

Date, Valid, Ref	Description/Location (click to be directed to www)	Comment/Recommendation
Ref. No: 23/00367/TPO   Received: Tue 25 Apr 2023   Validated: Thu 27 Apr 2023	Application for works to a protected tree - Chorley BC TPO 11 (Euxton) 1987: T8 Oak - Reduce lower lateral branches extending over garden of newly constructed property by up to 3 metres 14 Dunrobin Drive Euxton Chorley PR7 6NE	Std A1
Ref. No: 23/00366/DIS   Received: Tue 25 Apr 2023   Validated: Tue 25 Apr 2023	Application to discharge condition no.11 (emission rates) of planning permission ref. 18/01076/FUL (Section 73 application to vary condition 3 (approved plans) and remove conditions 6 and 7 (BREEAM) of planning permission ref: 18/00328/FULMAJ (which was for the erection of units in use class B1 and B8 with associated landscaping and erection of a double garage (following demolition of existing buildings in use class B8)). Guest House Farm Runshaw Lane Euxton Chorley PR7 6HD	No observations
Ref. No: 23/00360/FULHH   Received: Mon 24 Apr 2023   Validated: Mon 24 Apr 2023	Detached annex to rear of property providing ancillary accommodation 8 Barnside Euxton Chorley PR7 6AJ	The access for emergency interventions (ambulances etc.) appears to be inadequate. Considering this is ancillary accommodation, the statement appears to indicate that it may be changed in the future. The suitability of access should lead to a rejection of this application.
Ref. No: 23/00355/DIS   Received: Mon 24 Apr 2023   Validated: Wed 26 Apr 2023	Application to discharge conditions nos.10 (arboricultural method statement), 12 (Network Rail risk assessment), 14 (surface water sustainable drainage strategy), 18 (employment and skills plan), 19 (construction and traffic management plan), 23 (travel plan) and 24 (scheme for provision of play area) attached to planning permission 21/01475/FULMAJ (Erection of 108no. dwellings (Use Class C3) with associated access, landscaping, parking and other works following demolition of existing building) DXC Technology Euxton House Euxton Lane Euxton Chorley PR7 6FE	No observations

<p>Ref. No: 23/00354/DIS   Received: Mon 24 Apr 2023   Validated: Mon 24 Apr 2023</p>	<p>Application to discharge conditions nos.17 (written scheme of investigation for a programme of archaeological work) and 20 (construction surface water management plan) attached to planning permission ref:21/01475/FULMAJ (Erection of 108no. dwellings (Use Class C3) with associated access, landscaping, parking and other works following demolition of existing building) DXC Technology Euxton House Euxton Lane Euxton Chorley PR7 6FE</p>	<p>No observations</p>
<p>Ref. No: 23/00372/TPO   Received: Wed 26 Apr 2023   Validated: Wed 03 May 2023</p>	<p>Application for works to protected trees - Chorley BC TPO 1 (Euxton) 2020: T12 Crack Willow - Remove stem with cracked base. Pollard rest of stems to 10m to allow for re-growth; T14 Crack Willow - Remove tree due to condition and location; G3 (in part) Oak - Crown lift to 4m to prevent future issues with public; T17 - English Oak - Reduce horizontally orientated branch on south of stem by 1-2m back to suitable growth points. School Lane Euxton</p>	<p>4 trees, Std A1. For the viable tree proposed to be felled, more than one replacement tree should be provided if this application is approved. Std A2A will also apply regardless of the number of trees provided if approved.</p>

**Academy Conversion - Balshaw Lane Community Primary, Euxton  
PR7 6NS**

Dear Councillors,

Lancashire County Council has recently received notification from the DfE that Balshaw Lane Community Primary, Euxton, PR7 6NS is converting to an academy and joining the Aspirational Futures Multi-Academy Trust and that LCC should undertake the requisite due diligence exercise to enable the conversion to progress.

As part of this process LCC are informing the LCC, District and Parish Councillors that this conversion is progressing. The site may not be wholly within your boundary but as pupils from your area may attend this school we are advising neighbouring councillors to keep them informed.

The time frame for this conversion is 6 months from receipt of the Academy Order, however this can be undertaken sooner or in some cases can take longer due to the complexities involved.

If you have any questions please do contact Susan Strother at [susan.strother@lancashire.gov.uk](mailto:susan.strother@lancashire.gov.uk) to discuss.

Regards

Julie

**Julie Bell**  
**Interim Director of Education ,Skills and Culture**  
Lancashire County Council  
01772 536727  
07825996475  
[www.lancashire.gov.uk](http://www.lancashire.gov.uk)

## EUXTON PARISH COUNCIL

### **COMMUNICATIONS PROTOCOL**

#### **Scope**

The Code of Recommended Practice on Local Authority Publicity 2001 outlines a number of criteria and guidelines for local authorities to consider when publishing information for its public. This Practice document has been referred to when formulating this protocol. Also included in the revision of this document in September 2011 is the Model Protocol on Communications from the Governance Toolkit for Parish and Town Councils.

#### **Parish Council**

The Parish Council has powers which enable it to produce and circulate publicity regarding its functions and responsibilities. These powers are contained in sections of the Local Government Act 1972 (111, 142, 144 and 145).

At the present time the Parish Council produces; agenda, minutes, annual report, newsletter, website, leaflets, posters, noticeboard notices, press releases and uses 2 social media channels (this list is not exhaustive and may be subject to changes in the future).

#### **1. Purpose for Parish Council Publicity**

The Parish Council uses publicity to:

##### Primary Function

Raise awareness of:

- fulfil its legal obligations to notify the public of its meetings (forthcoming/past)
- the services and responsibilities of the Council
- Council activities, initiatives, achievements and successes
- how the Council represents the views of the electorate

Ensure the electorate has information on the proposed decisions the Council are to make and make:

- agenda and minutes
- annual report, budgets, precept etc

Ensure the electorate has information on how to contact the Council:

- contact details for the Council and for Councillors

To consult on issues which it believes affects its community:

- consult on the Council budget and/or policies
- consult on any Council plans or surveys
- consult on any projects

To advertise:

- a Council event
- a Council employment vacancy or Councillor casual vacancy
- a Council election

To display or inform the electorate of available information on Council business:

- Council meeting minutes
- responses to planning applications
- annual report and annual return
- planning applications the Council is consulted on
- Council's budget
- Council policies

### Secondary Function

If space allows, the Council's publications could carry local village information for the benefit and knowledge of residents:

- to publicise local groups or organisations events
- an event of another authority/organisation it believes will matter or be of interest or assistance to residents
- advertise local events, initiatives, organised by legitimate organised bodies
- issues/developments or consultations it feels its community will be affected by

All the above will be published with regards to the conditions set out below.

## **2. Parish Council's Main Publications**

The Parish Council produces; agenda, minutes, annual report, newsletter, website, leaflets, posters, noticeboard notices, press releases and 2 social media channels (this list is not exhaustive and may be subject to changes in the future).

Below are the three main ways the Council publishes information to electors:

### Noticeboard

- First and foremost to display Council documents to satisfy its legal obligations.
- Display required information from statutory bodies such as; Auditor, Electoral Officer etc
- Display contact details for the Council and its Councillors.
- If space allows, display local events, information or helpful contacts.

### Newsletter

- Publish documents such as the annual report, precept budget, project updates.
- Notify residents of forthcoming meetings, activities etc.
- Primarily publicise Council activities and raise awareness of its successes.
- Report on progress made with projects or developments in the area.
- Carry advertising from the Council or paid adverts from local businesses.
- Ensure items are not published which may be construed to be organised, run or protected by the Council or its Council insurance.
- If space allows, publish articles from local organised groups on activities in the village which clearly explains, if there is any, what the Council's involvement is.



### Website

As the items above and...

- To display information, which has been previously published such as, minutes of meetings, precept budget etc.
- To display information which could not normally be published in a newsletter or noticeboard due to their size or time restraints, items such as; Council documents, Councillor's photographs, consultation documents, planning lists, press releases and project photographs etc.
- Ensure any items displayed from other organisations or individuals cannot be construed to be organised, run or protected by the Council's insurance.

### Social Media

As the items above and...

- Issue last minute reminders, adverts of events etc. and link back to the website as much as possible for the full details or attached documents.

## **3. Responsibilities for Communications**

### **A. Parish Council Correspondence**

- (i) The point of contact for the Parish Council is the Clerk, and it is to the Clerk that all correspondence for the Parish Council should be addressed.
- (ii) The Clerk should deal with all correspondence following a meeting.
- (iii) No individual Councillor or Officer should be the sole custodian of any correspondence or information in the name of the Parish Council, a committee, sub-committee or working party. In particular, Councillors and Officers do not have a right to obtain confidential information/documentation unless they can demonstrate a 'need to know'.
- (iv) All official correspondence should be sent by the Clerk in the name of the Council using Council letter headed paper.
- (v) Where correspondence from the Clerk to a Councillor is copied to another person, the addressee should be made aware that a copy is being forwarded to that other person (e.g. copy to XX).

### **B. Agenda Items for Council, Committees, Sub-Committees etc**

- (i) The agenda is set by the Clerk. The Clerk will liaise with the Chairman on requested items but the Clerk sets and signs the agenda.
- (ii) Agenda should be clear and concise. It should contain sufficient information to enable Councillors to make an informed decision, and for the public to understand what matters are being considered and what decisions are to be taken at a meeting.
- (iii) Items for information should be kept to a minimum on an agenda.
- (iv) Where the Clerk or a Councillor wishes fellow Councillors to receive matters for "information only", this information will be circulated via the Clerk.

**C. Communications with the Press and Public**

- (i) The Clerk will clear all press reports, or comments to the media, with the Chair of the Council or the Chair of the relevant committee.
- (ii) Press reports from the Council, its committees or working parties should be from the Clerk or an officer or via the reporter's own attendance at a meeting.
- (iii) Councillors who are asked for comment by the press should make it clear that it is a personal view and ask that it be clearly reported as their personal view.
- (iv) If Councillors receive a complaint from a member of the public, this should be dealt with under the Council's adopted complaints procedure, or via a Council agenda item.

**D. Communications with Parish Council Staff**

- (i) Councillors must not give instructions to any member of staff, unless authorised to do so (for example, three or more Councillors sitting as a committee or sub-committee with appropriate delegated powers from the Council).
- (ii) No individual Councillor, regardless of whether or not they are the Chair of the Council, the Chair of a committee or other meeting, may give instructions to the Clerk or to another employee which are inconsistent or conflict with Council decisions or arrangements for delegated power.
- (iii) Telephone calls should be appropriate to the work of the Parish Council.
- (iv) E-mails:
  - Instant replies should not be expected from the Clerk; reasons for urgency should be stated;
  - Information to Councillors should normally be directed via the Clerk;
  - E-mails from Councillors to external parties should be copied to the Clerk;
  - Councillors should acknowledge their e-mails when requested to do so.
- (v) Meetings with the Clerk or other officers:
  - Wherever possible an appointment should be made;
  - Meetings should be relevant to the work of that particular officer;
  - Councillors should be clear that the matter is legitimate Council business and not matters driven by personal or political agendas.

**4. Process**

The Clerk is the editor of Council publications and will work using this protocol as reference to ensure compliance. If there is any doubt as to the content of a submission for any of the Council publications the Clerk will not publish the item and seek further advice, whether that be from the Chair, legal or professional.

## **5. Examples of Council Publication principles**

- Council policies and aims should be as objective as possible, concentrate on facts or explanations or both.
- Council should only comment or respond to documents of others in an objective, balanced, informative and accurate way. It should set out reasons for views, not show prejudice or attack, or be party political.
- Service provisions should be reported factually.
- Contentious issues should be handled with care, presented clearly, fairly and as simply as possible.
- Nothing should be published which would defame other authorities or personally attack people working for those authorities.
- No personal attacks (or what might appear to be) on any person, or position, should be published.
- Public funds should not be used to mount publicity campaigns where its primary purpose is to persuade the public to hold a particular view on a question of policy.
- A general publication should never be limited or exclusively delivered or available to a specific area/part/group of the village. If it is a general publication it should be available to the whole village/electorate. This would not apply if the publication was an area specific publication.
- It should be minded that some information mechanisms such as a website are not considered to be fully accessible and should not solely be used for certain types or forms of consultations/communication.
- Items written or published for individual Councillors should not be disrespectful or derogatory to others in the Council or other local authority positions.
- Items written or published for individual Councillors should not personalise issues or be written for personal image raising purposes.
- Publicity should not be, or liable to misrepresentation as being party political, or influence public opinion on policy. Material should never contain political slogans, logos or political party catch-phrases.
- An article by an individual Councillor should never campaign for their election or selection on any forthcoming elections, referendums and/or petitions.
- Council should exercise the utmost care in ensuring all items it publishes are legitimate, legal, official and/or organised and do not promote anything unethical, irresponsible or the lowering of moral standards.
- Never publish or display items from other organisations or individuals which may be construed to be organised, run or protected by Council insurance.

## Retention of documents required for the Audit of Parish Council's

Document	Minimum retention period	Reason	Euxton specific
Minute books	Indefinite	Archive	Paper - very old minute books, 10 bound books 1921 to 1986 – February 2016 deposited with Euxton Library. Paper - typed paper minutes from 1986 to present – stored with Clerk Paper & Electronic – from July 1999, typed minutes stored in an annual marked file for the signed copies & 'electronic' stored on computer/cloud
Scales of fees and charges	6 years	Management	Interpretation: Fees charged for football field seasonal rentals. Paper – invoices within the Accounts ledger lever arch files, stored with the Clerk Electronic - invoices – electronic stored on computer/cloud
Receipt and payment account(s)	Indefinite	Archive	Interpretation - Actual Accounts Record (not paper vouchers or receipts – see below) Paper - Pre 1999 – ledger files (paper) stored with Clerk Paper - Post 1999 – paper print files with Clerk Electronic – 2016/2017 accounts package and backed up on laptop and cloud
Receipt books of all kinds	6 years	VAT	Paper - all payments to/receipts to the Council are stored with that financial years' Accounts (ie the Accounts lever arch file), stored with Clerk
Bank statements, including deposit/savings accounts	Last completed audit year	Audit	Paper - in bank ring binder with accounts, stored with Clerk. Electronic statements are printed off for audit. Bank can reproduce if necessary
Bank paying-in books	Last completed audit year	Audit	Paper - stored with Clerk in office
Cheque book stubs	Last completed audit year	Audit	Paper - stored with Clerk in office

Quotations and tenders	6 years	Limitation Act 1980 (as amended)	Paper - accepted/ordered quotations are copied in the relevant Accounts file for that financial year. Others stored with relevant Project File. Stored with Clerk. Electronic – contractors/figures will appear in agenda/minutes when considered and chosen.
Paid invoices	6 years	VAT	Interpretation – actual invoices sent in to and paid out by the Council ‘Vouchers’ Paper - stored with that financial years’ Accounts (ie, the Accounts lever arch file) paper, stored with Clerk. Electronic - monthly expenditure vouchers scanned in from 01/04/13 and stored electronically with relevant electronic Accounts file stored on computer/cloud
Paid cheques	6 years	Limitation Act 1980 (as amended)	Interpretation – cheques written by Council, sent to supplier, then returned by bank to Council. This no longer happens, banks do not return paid cheques.
VAT records	6 years	VAT	Interpretation – claim forms sent in to VAT claim office Paper - claim forms are stored in the VAT filed in Clerk’s office. Electronic - when VAT is claimed/received back on an expenditure it is logged by the expenditure using a claim date, this information is in the excel Accounts file stored on computer/cloud
Petty cash, postage and telephone books	6 years	Tax, VAT, Limitation Act 1980 (as amended)	Paper - relevant items stored as supporting papers with expenditure vouchers in the Accounts lever arch file. Stored with Clerk.
Timesheets	Last completed audit year	Audit	Interpretation: time-sheets submitted by the village caretakers and other staff. Paper - stored in the office with the Clerk.  Interpretation: time-logs made by the Clerk. Electronic – stored on computer/cloud

Wages books	12 years	Superannuation	Paper - stored in the office with the Clerk up to end of tax year March 2016. Paper – from 1 April 2016 onwards stored with contracted out company Studholme Bell, Euxton.
Insurance policies	While valid	Management	Paper - policy documents stored in the office with the Clerk 'Insurance' file Electronic – from October 2014 - policy documents in Insurance file stored on computer/cloud
Certificates for Insurance against liability for employees	40 years from date on which insurance commenced or was renewed	The Employers' Liability (Compulsory Insurance) Regulations 1998 (SI. 2753), Management	Paper - policy documents stored in the office with the Clerk 'Insurance' file Electronic – from October 2014 - policy documents in Insurance file stored on computer/cloud
Investments	Indefinite	Audit, Management	Interpreted – we have no investments currently (not counting balances in banks which is covered above)
Title deeds, leases, agreements, contracts	Indefinite	Audit, Management	Paper - stored in the office with the Clerk. Electronic - scanned in to 'Deeds' file - electronic stored on computer/cloud
Members allowances register	6 years	Tax, Limitation Act 1980 (as amended)	Interpretation – Euxton does not run a Members Allowances scheme presently.

For Halls, Burial Grounds and Allotments there are specific rules so if these become relevant for Euxton they will need to be added on to this register.

## EUXTON PARISH COUNCIL

## Item 12

Document	Minimum retention period	Reason	Euxton specific
Allotments	Indefinite	Archive	Electronic package is used to hold details of plots and plot holders. Information is stored on host servers. Paper agreements and contracts are scanned in and attached to the electronic package.

Reviewed: .....BY COUNCIL..... Date: .....18 May 2023.....

Dear colleagues

I hope you are well.

Chorley Council is currently consulting on proposed changes to its Housing Assistance policy.

The attached report went to the Council's Executive Cabinet on 30<sup>th</sup> March. Members have approved the request to go out to consultation – which we are now doing during May and June.

Also attached is the draft revised policy document, plus a document that summarises the key changes.

There are 13 proposed changes and I'd be happy to receive comments on any or all of them, but would be particularly interested in your thoughts on the following:

1. Discretionary DFG – raising the funding threshold to £50,000 in certain cases
2. Engaging an Occupational Therapist within the HIA/Communities service as a pilot project
3. Introduction of a Hospital Discharge Grant
4. Introduction of a Dementia Grant
5. Affordable Warmth Assistance

**Deadline for response is Monday 19<sup>th</sup> June**

Many thanks for your anticipated engagement

Martin

**Martin Sample**

Housing Team Leader (Private Sector)





# **Private Sector Housing Assistance Policy**

## **2023**

## **Draft for consultation**

Housing Grants, Construction and Regeneration Act  
1996

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

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## 1.0 Introduction and Policy Aims

1.1 The Private Sector Housing Assistance Policy (PSHAP) details the financial assistance available from the Council to qualifying home owners, private tenants and tenants of Registered Providers of social housing ("Housing Associations") to improve their living conditions and to enable independent living.

1.2 While the PSHAP is principally for private sector owners, tenants and landlords, the adaptations section is also relevant to tenants occupying social housing.

1.3 The PSHAP is one element of the Council's Housing Strategy (2019 to 2024), the aim of which is to "ensure that everyone in the borough is able to access affordable and good quality housing that suits their needs. The type of tenure and where someone lives will not mean that they should have to accept poorer quality or less affordable accommodation".

1.4 The Housing Strategy identifies four priorities:

- Securing quality across all housing
- Supporting people to remain independent in their own homes
- Preventing Homelessness
- Supporting a balanced housing market

1.5 The PSHAP also links to the Council's Corporate Strategy, which contains commitments to address four key priorities:

- Housing where residents can live well
- Healthy, safe and engaged communities
- An enterprising economy with vibrant local centres in urban and rural areas
- A green and sustainable borough

1.6 The assistance provided through the PSHAP contributes specifically to the Housing Strategy priority of 'supporting people to remain independent in their own homes'. It also contributes to the Corporate Strategy commitments to achieve 'Housing where residents can live well' and 'Healthy, safe and engaged communities'.

1.7 The PSHAP has a number of policy aims:

- To offer a framework of housing-related assistance to vulnerable groups/households.
- To contribute to a reduction in the rates of fuel poverty amongst Chorley households and to assist residents to achieve affordable warmth within their homes.
- To assist disabled people with adaptations to facilitate their movement in and around their home, thereby improving their quality of life.
- By embedding links across various Council services and with external partners, to encourage resilience amongst the communities that we serve.

## 2.0 Statutory Context

2.1 Under Part 1 of the Housing Grants, Construction and Regeneration Act 1996 the Council, in its capacity as a Housing Authority, has a statutory duty to provide Disabled Facilities Grants (DFGs) to qualifying applicants.

2.2 The primary purpose of DFG is to provide aids and adaptations to enable people with disabilities to live independently and safely in their own homes.

2.3 It is a mandatory requirement for the Council to provide DFGs to applicants across all tenures who are eligible.

2.4 The Regulatory Reform (Housing Assistance) (England and Wales) Order 2002 (commonly known as the 'RRO') gives Councils the flexibility to provide discretionary assistance to promote independent living and wellbeing, ensuring homes are safe to live in for disabled occupants.

2.5 Article 3 of the RRO introduced wide ranging discretionary powers which enable Councils to develop different forms of assistance to meet local needs. Chorley Council has utilised the provisions of the RRO in its PSHAP since April 2017.

2.6 In order to use the powers within the RRO a Council must first formally adopt a policy for the provision of assistance. This policy complies with that requirement.

2.7 Any financial assistance offered under this Policy, through the powers contained within the RRO, are subject to the availability of funding. Financial assistance for adaptations via the RRO, which exceed the DFG statutory framework, is provided at the Council's discretion and may be withdrawn at any time without notice.

2.8 The Council's expectation is that homeowners will maintain their own property so that it remains safe, but it accepts that some homeowners – particularly the elderly and the most vulnerable – may not have the necessary resources to do so. In certain circumstances the Council will assist such homeowners.

## 3.0 Funding

3.1 Since 2015 the Government has provided funding for DFG through the Better Care Fund (BCF) in recognition of the importance of ensuring that adaptations are part of an integrated approach to housing, health and social care locally, and to help to promote joined-up local person-centred approaches to supporting communities.

3.2 Government provides ring-fenced DFG to BCF budget holders (which in Lancashire is Lancashire County Council). Funding must be spent in accordance with BCF plans which are agreed between Local Government and Local Health Commissioners, with the Local Health and Wellbeing Board acting as owners and custodians.

3.3 In 'two-tier' administrative areas such as Chorley, the District Councils are responsible for the provision of DFGs to eligible applicants. It is Lancashire County Council's duty to pass on the annual DFG funding allocation to the Council in its entirety unless otherwise agreed.

3.4 In addition to DFG funding received by the Council, other sources of funding will be sought from various sources such as Energy Company Obligation (for affordable warmth measures) and via any other suitable opportunities which may become available.

## **4.0 Assessment and delivery**

4.1 Chorley Council's in-house Home Improvement Agency (HIA) will assess, approve and facilitate the delivery of the DFG and other forms of discretionary financial assistance.

4.2 All grants are subject to certain eligibility criteria and other conditions. For full details please see Appendix A for DFG and Appendix B for discretionary grants.

## **5.0 Applying for assistance**

5.1 Residents who wish to apply for Disabled Facilities Grant should first contact Lancashire County Council (LCC) Adult Social Care to register their request to be assessed by an Occupational Therapist.

5.2 LCC Occupational Therapy department is responsible for assessing residents' needs. Once the assessment has been carried out, a referral containing recommendations for home adaptations is sent to the Council's Home Improvement Agency (HIA) who then contact the resident to activate the DFG application process.

5.3 Chorley Council is also intending to progress an approved pilot project whereby an Occupational Therapist (OT) will be co-located within the HIA team and will undertake assessments of residents which could lead to DFG referrals. The OT's role will also involve making referrals to other support available within the Communities service and within the Council as a whole.

5.4 In all cases, for all forms of assistance under this policy, a completed application form will be required. In the case of residents in rented accommodation, proof of the landlord's permission will also be required.

5.5 To enable fairer access, the Council will progress existing plans to place application forms relating to this policy online via the Council's website.

## **6.0 Cases which fall outside of the policy**

6.1 The ethos of Council staff administering the policy is to attempt to assist wherever possible. It is not a 'gatekeeping' mindset, and Officers will seek to apply grant conditions flexibly and sensitively in order to support applicants.

6.2 In cases where Officers have determined that exceptional circumstances exist or where exceptional hardship would result from assistance not being provided, a referral can be made by the HIA Team to the Director of Communities, acting under delegated powers granted by the Executive Member (Homes and Housing).

6.3 An example might be where an applicant has an assessed financial contribution towards the cost of DFG-funded adaptations but is able to demonstrate that there are considerable affordability issues which would cause significant hardship if they were required to make the contribution.

6.4 Another example could be to permit DFG applications at two addresses where separated parents share caring responsibilities for a disabled child.

## **7.0 Chorley Home Improvement Agency (HIA)**

7.1 The Home Improvement Agency (HIA) is a team within Chorley Council's Communities service and Communities directorate.

7.2 The team's aim is to ensure that vulnerable people can remain living as independently as possible in their own homes whilst also maintaining their health and wellbeing.

7.3 The HIA is accredited by Foundations which is Government-appointed National Body for Home Improvement Agencies in England. Foundations offer a range of advisory services to improve the local delivery of DFG and have had links with the Council's HIA for many years.

7.4 The HIA team provide practical support to residents wishing to apply for DFG, including liaising with social and private landlords in cases where the applicant is a tenant, designing adaptation solutions, determining applicant eligibility, tendering works, appointment of contractors, overseeing of work and acting on behalf of residents to remedy any defects during the warranty period.

7.5 The HIA team also signpost residents to appropriate support and advocacy services that can assist them, both within the Council and externally.

7.6 The HIA works with external partners such as Occupational Therapists, Social Workers and Registered Providers to assist disabled residents who require adaptations.

7.7 On behalf of the Council the HIA administers Adaptations Agreements with various Registered Providers operating in the Borough. The Adaptation Agreements outline respective roles and responsibilities and confirm the scale of the financial contributions (on a case by case basis) to be provided by the Registered Provider.

## **8.0 Customer Feedback**

8.1 Customers can help us to improve our services by providing feedback.

8.2 The HIA team will provide opportunities for residents to provide feedback by completing satisfaction surveys on completion of works funded by DFG.

8.3 Complaints will be handled in accordance with the Council's Customer Care policy.

8.4 The Council would like to hear from customers if they:

- Have an idea that could help the Council to do things better
- Wish to compliment the Council for a good job
- Wish to point out something that we have done wrong or wish to complain

## **9.0 Monitoring, Review and Consultation**

9.1 Monitoring of the delivery of the policy will be carried out to ensure that implementation continues to meet local needs. Key Performance Indicators (KPI) will be reviewed by the Council's Senior Management Team in accordance with the KPI reporting schedules.

9.2 This policy will also be reviewed in line with any legislative changes and/or best practice.

9.3 An interim review of this policy will be carried out after two years of its adoption, with a full review undertaken after a further two years.

9.4 In reviewing this policy, the Council will consult with partners and stakeholders including the cohorts of groups referred to within this policy.

## 10.0 Key Performance Indicators

10.1 The Council's targets for the delivery of DFG and CAG are as follows:

KPI Description	Target	Explanation of target	Reporting intervals
Percentage of DFG/CAG budget consumed	95% per year	Higher is better	Monthly
Number of weeks from date that the referral was received to the application approval date	13 weeks	Lower is better	Monthly
Number of weeks from Grant Approval to completion of works	10 weeks	Lower is better	Quarterly
Number of DFG/CAG cases approved but work is yet to commence	18	Lower is better	Monthly

10.2 In addition, the Council will obtain information quarterly from Lancashire County Council as to the numbers of cases awaiting Occupational Therapy assessment. This is important information for the Council in terms of service planning and capacity management.

## 11.0 Summary of available assistance

Assistance	Funding Maximum	Financial Eligibility	Objective
Mandatory DFG	Up to £30,000	Means tested	To assist disabled residents to remain safely independent at home
Additional DFG	Up to £20,000 above statutory maximum	Means tested	To expedite the application process in cases where maximum mandatory DFG does not cover entire cost of recommended works
Chorley Adaptation Grant (CAG)	Full cost of one adaptation item (most expensive item likely to be a Through Floor Lift at around £12,000)	Not means tested	To provide flexibility by widening DFG eligibility criteria and streamlining the application process. CAG has been used successfully since 2017-18.
Hospital Discharge Grant	£3,000	Not means tested	To support people with disabilities and/or vulnerabilities being discharged from hospital where the property needs urgent repairs/heating provision/deep cleaning.
Dementia Grant	£2,000	Not means tested	To support residents with dementia diagnosis preventatively before condition escalates to a DFG being required. Small modifications to help a person to stay safely at home for longer.
Handyperson	No fixed maximum but unlikely to exceed £100 per job	Not means tested	Handyperson service does small repairs and maintenance jobs within customers' homes. A 'small repair' is defined as a non-skilled 'DIY' task.
Affordable Warmth Assistance	Cost of boiler service – up to £100	Means tested	To provide boiler servicing to enable qualifying residents to achieve affordable warmth
Minor Aids and Adaptations	£1000 per order	Not Means tested	To provide low level adaptation interventions to keep residents safely independent at home. This service is an LCC Statutory function delivered under contract by the Council



## Appendix A: Disabled Facilities Grant (DFG)

**A1. Definition:** DFGs are capital grants that are available to disabled people of all ages and in all housing tenures to contribute to the cost of adaptations. They are administered by Local Housing Authorities in England and enable eligible disabled people to continue to live safely and independently at home.

**A2. Scope:** This includes people with physical disabilities, those with a mental health condition, autistic people, those with learning disabilities, cognitive impairments such as dementia, and progressive conditions such as Motor Neurone Disease. It includes people experiencing age related disabilities and can also include those at palliative care stage.

**A3. Legislation:** The main provisions governing mandatory DFGs are found in the Housing Grants, Construction and Regeneration Act 1996.

**A4. Referral Pathway and Prioritisation:** Applicants for DFG should normally be referred by an Occupational Therapist (OT) or other relevant healthcare professional suitably qualified to assess need. Referrals are either Standard Priority or High Priority.

**A5. Professional Fee Reimbursement:** In the event of an applicant engaging a private OT, architect or other professional, the Council will reimburse reasonable costs incurred even if the recommended works are proven to be technically unfeasible and cannot proceed to grant award. This clause does not apply in instances where the applicant has simply changed their mind about pursuing a DFG.

**A6. Finances:** The Statutory maximum per person per application is £30,000, although provision exists within the Council's RRO to permit up to a further £20,000 where necessary.

**A7. Eligibility:** The following types of work are eligible for DFG provided that it is "necessary and appropriate" for that person, and "reasonable and practicable" having regard to the age and condition of the property:

- Making the building or dwelling safe
- Facilitating access to and from the building
- Facilitating access to or providing a bedroom
- Facilitating access to the principal family room
- Provision of a room containing a bath or shower or facilitating the use of such a facility
- Provision of a room containing a WC or facilitating the use of such a facility
- Provision of a room containing a Wash hand basin or facilitating the use of such a facility
- Facilitating the preparation and cooking of food (if used by the disabled person)
- Providing or improving a heating system
- Facilitating the use of power, light or heat by altering it or by providing additional means of control
- Facilitating access to and from a garden or making a garden safe

**A8. Applicant criteria:** The applicant must be over 18, should be the homeowner or the tenant, but DFG is available to adapt the home of any disabled person living in the property to enable them to continue to live there. The property can include dwellings, mobile homes, caravans and houseboats.

A9: **Existing footprint:** Where the existing footprint or layout of the dwelling, including outbuildings and garages, can be adapted or converted to accommodate the facilities required the Council will not consider any extension to the property.

A10: **Extension:** Where an extension is necessary and there is no other option, the Council will consider the most cost-effective method of meeting the applicant's requirements.

A11: **Applicant preference:** Where the applicant has a preferred scope of works which exceed that which is necessary to meet the disabled person's needs (such as an extension rather than the provision of stair lift and level access shower) the Council will only fund the cost of the original recommended works, with the remainder being funded by the applicant.

A12: **Timing of application (i):** Applications for grant aid will not be considered where works have been completed.

A13: **Timing of application (ii):** Applications for grants where works have started but have not been completed will only be considered where the applicant can demonstrate exceptional circumstances as to why they did not apply and seek approval prior to the start of the work. In such cases any work already completed will be excluded from the subsequent application.

A14: **Landlords** of rented accommodation may apply for DFG on behalf of disabled tenants

A15: **Means Testing:** Applicants for the mandatory DFG undergo a means test which is formulated by the Government. Adaptations for children up to 18 are not means tested.

A16: **Passported Benefits:** Individuals in receipt of the following income related benefits at the time that the application is made will be exempt from means testing:

- Income Support
- Income related Job Seekers Allowance
- Income based Employment Support Allowance
- Guaranteed Pension Credit
- Housing Benefit
- Working Tax Credit or Child Tax Credit with annual income below £15,050

A17: Chorley Council now includes applicants in receipt of **Council Tax Support** as a passported benefit

A18: **Grant Condition period:** The disabled person must intend to occupy the property as their only or main residence for a period of 5 years after the works are signed off by the Council as satisfactorily completed. In the event of a resident moving to another address within the Borough and applying for DFG within 5 years the Council is entitled to decline the application but reserves the right to waive this requirement if there are mitigating circumstances.

A19 **Service Standards:** Legislation requires a decision from the Council to approve the grant or not within 6 months of receiving the full DFG application (this includes all necessary information e.g. proof of home ownership or landlord consent).

A20: **Completion of works:** In accordance with legislation, the Council will aim to complete the installation of all disabled adaptations within 12 months from the date of grant approval.

A21: **Fee:** The Council will continue to add a 12.5% fee to each DFG approval notice issued.

## Appendix B: Discretionary Financial Assistance

### B1: Additional DFG

This is a discretionary grant for those eligible for a mandatory DFG, where the cost of the work which is considered to be 'necessary and appropriate' exceeds the maximum grant payable. Up to £20,000 additional DFG can be awarded.

#### Eligibility Criteria for Additional DFG

- The applicant has been assessed as qualifying via the mandatory DFG application process
- The work has been identified as necessary and appropriate and the costs have been validated and confirmed as 'reasonable and practicable' through a formal tender process

#### Conditions

- Any assessed financial contribution would have to be paid by the applicant

### B2: Chorley Adaptation Grant (CAG)

This is a discretionary grant, using DFG funding, which enables the Council to streamline the application process by not applying the DFG Financial Assessment in cases where the recommended work consists of a single adaptation item, such as:

- Stairlift
- Through Floor Lift
- Ceiling Track Hoists
- Wash-dry WCs
- Bathroom adaptations incorporating Level Access Showers and consequent reconfiguration of bathroom
- Hospital discharge cases identified by health and/or social care professionals

The CAG, which was introduced in April 2017, enables the Council to offer grant funding to customers who would fail the DFG Financial Assessment but who still have a need for an adaptation as determined by a clinician.

#### Eligibility Criteria for Chorley Adaptation Grant

- The applicant has been assessed as requiring an adaptation
- The recommended work must be 'necessary and appropriate' and 'reasonable and practicable' using the DFG definition
- The work would still require landlord's permission where the applicant rents from a social or private landlord

## Conditions

- The applicant retains the right to make a full DFG application rather than a CAG application should they choose to do so.
- The Grant Period of 5 years will apply – meaning that the Council reserves the right not to accept another CAG application from the same applicant at different address in Chorley within 5 years of the 'certified date'.
- The applicant is eligible to apply for a further CAG at the same address should their needs change in the future.
- If an applicant fails the DFG Financial Assessment, the Council is willing to consider converting the referral to a CAG and to fund the most expensive of the recommended items, on condition that the applicant self-funds the other recommended items first and completes the work to a standard which meets their assessed needs. The Council will adhere to the Occupational Therapist's recommendations in terms of confirming the scope of required works for each applicant.
- In the event of the Council receiving an OT recommendation which consists of more than one adaptation item, but then later receiving an amended referral containing one adaptation item, the most recent referral will supersede any other 'live' referral and the case will be progressed as a CAG (or vice versa).

### **B3: Hospital Discharge Grant**

The Council, at its discretion, may pay up to £3,000 to support people with disabilities and/or vulnerabilities being discharged from hospital.

Work which may be carried out includes deep cleaning, clearing properties, repairs needed to remove from a property a Category 1 hazard/s under the HHSRS (Housing Health and Safety Ratings System).

## Eligibility Criteria for Hospital Discharge Grant

This funding is not means tested

## Conditions

Hospital Discharge Grant will be available if there is no other relevant health or social care funding available. It requires a referral from an OT or relevant healthcare professional and is a one-off grant.

### **B4: Dementia Grant**

The Dementia Grant will support residents with dementia diagnosis preventatively before their condition escalates to a DFG being required. Small modifications up to a maximum value of £2000 will be funded to help a person to stay safely at home for longer. These would include interventions such as:

- Labels and signs on doors and cupboards
- Task focussed lighting in bathrooms and kitchens
- Assistive technology (eg to provide reminders and to monitor activity)

- Safer flooring to reduce falls risks
- Decoration to improve contrast between walls and floors
- Installing coloured fixtures to create a contrast for items such as toilet seats and grabrails

### Eligibility Criteria for Dementia Grant

Applicants with a confirmed diagnosis of dementia validated by medical professional.  
Not means tested

### Conditions

Landlord permission required for any changes to fixtures in rented accommodation

### B5: Handyperson service

The Handyperson service carries out small repairs and maintenance jobs within customers' homes and their immediate external environment. A 'small repair' is defined as a non-skilled 'DIY' task. The service is delivered on the Council's behalf by Preston Care and Repair [www.carerepair.org](http://www.carerepair.org)

### Eligibility Criteria for Handyperson service

Residents who live in the Chorley Council area, are aged 18 or over, and either reside in private rented accommodation or own their own home.

**AND** meet **at least one** of the criteria to be eligible for free Handyperson services:

**Criterion 1:** Have a disability that is - or could be - registered and/or have a diagnosed long-term health condition/s that directly affect their mobility or independence to stay safe in their own home. Examples would include instances where the person has been diagnosed/ are being treated for one or more Long Term Condition's (LTC) including dementia, mental health illness, osteoarthritis, respiratory conditions, stroke, coronary heart disease conditions, neurological conditions (multiple sclerosis, Parkinson's disease etc..).

**Criterion 2:** When there is an imminent and/or major risk that will lead to the person having an unscheduled admission to hospital or residential care without intervention. Examples would include older people with recurrent falls, or have been assessed as being at increased risk of falling, or where the person has had a recent hospitalisation/short term residential placement (within the last 6 months) that could be directly linked to their home environment.

**Criterion 3:** The service is needed to facilitate a discharge from hospital where it would not be deemed safe for them to return without intervention.

## Conditions

Handyperson service cannot be used to carry out tasks in rented property which are classed as Landlord responsibility repairs under the Tenancy Agreement.

Qualifying residents can access the service free of charge but would have to pay for any materials used.

### **B6: Affordable Warmth Assistance**

Affordable Warmth Assistance provides an opportunity for eligible households to have their boiler serviced free of charge.

Regular servicing will enable customers to have a safe boiler, potentially save money on their energy bills, and also identify any problems with the boiler before they escalate.

The boiler servicing offer via Affordable Warmth Assistance applies to **functioning boilers only**.

## Eligibility Criteria for Affordable Warmth Assistance

Owner Occupiers

**AND**

Aged 60 and over

**AND**

In receipt of income-related benefit (such as Guaranteed Pension Credit)

**AND**

In receipt of disability-related benefits (such as Attendance Allowance)

In exceptional circumstances of cases of extreme hardship, Affordable Warmth Assistance will be available to customers outside these eligibility criteria. This will be determined on a case by case basis by managers within the Communities service at Chorley Council.

## Conditions

Subject to budget availability, the Council may be able to offer a financial contribution of up to £200 to assist the resident in paying for any required repairs which are identified while the heating engineer is carrying out the boiler service.

All work undertaken under Affordable Warmth Assistance is to be carried out by a Gas Safe Registered Heating Engineer.

Affordable Warmth Assistance will not be available in cases where the resident has a service/repair plan which covers boiler repairs, and which includes an annual boiler maintenance service.

Affordable Warmth Assistance will not be available in instances where the property is being marketed for sale.

**In addition to its own directly funded and delivered Affordable Warmth initiative, the Council participates in a county-wide energy efficiency/affordable warmth scheme called Cosy Homes in Lancashire (CHIL) [www.chil.uk.com](http://www.chil.uk.com)**

**The Council will signpost residents to Cosy Homes in Lancashire whose scheme administrators will assist residents in identifying potential grant funding sources as various government-backed schemes are launched.**

**The Council will also monitor and promote the availability of any other Energy Efficiency/Affordable Warmth schemes which may become available.**

## **B7: Minor Aids and Adaptations**

Minor Aids and Adaptations are those costing less than £1,000. These include banister rails, step adaptations, external metal rails and other bespoke items that are covered under the Care Act.

This is a statutory service which is Lancashire County Council's duty to provide.

Chorley Council is their appointed delivery partner for this service in the borough of Chorley.

### **Eligibility Criteria for Minor Aids and Adaptations**

The service is available for Chorley residents who either own their own home or rent privately (social landlords have a duty to directly provide minor aids and adaptations for their tenants).

Residents must first be assessed by a Lancashire County Council Occupational Therapist or Social Care Support Officer.

It is not means tested.

### **Conditions**

Adaptations exceeding £1000 are not eligible via this route.

Residents seeking minor aids and adaptations must first contact Lancashire County Council to request an assessment.

## **Appendix C: Repayment of Disabled Facilities Grant**

### **C1: Legal power to reclaim Disabled Facilities Grant**

**Legislation:** The power to require repayment of certain DFGs is contained in the Housing Grants Construction and Regeneration Act 1996 Section 34(6)(b) and in the Disabled Facilities Grant (Condition relating to approval or payment of grant) General Consent 2008.

**Legal Scope:** Where a Local Authority approves an application for a grant under part 1 of the Act, **and** the grant is for a sum exceeding £5,000 **and** the applicant has a qualifying owner's interest in the premises in which the relevant works are being carried out, the Local Authority may impose the conditions contained in the following paragraph:

**Legal Conditions:** The Local Authority may demand the repayment by the recipient of such part of the grant that exceeds £5,000 (but may not demand an amount that exceeds £10,000) if

- The recipient disposes (whether by sale, assignment, transfer or otherwise) of the premises in respect of which the grant was awarded within 10 years of the certified date  
**and**
- The Local Authority has considered the extent to which the recipient of the grant would suffer financial hardship were he/she required to repay all or part of the grant.
- Whether the disposal of the premises is to enable the recipient to take up employment or change the location of his/her employment.
- Whether disposal is made for reasons connected with the physical or mental health or well-being of the grant recipient or of a disabled occupant of the premises.
- Whether the disposal is made to enable the grant recipient to live with or near any person who is disabled or infirm or in need of care, which the grant recipient is intending to provide.

### **C2: Chorley Council policy**

1. All DFGs over the value of £5,000 are registered as a Local Land Charge (registration date being the 'certified date' on which the DFG-funded work was signed off by the Council as satisfactorily completed).
2. There are several exceptions to this:
  - DFG funded work in properties owned by Registered Providers are not subject to a Land Charge and are thus not registered.
  - Removeable equipment items (Stairlifts, Through Floor Lifts, Ceiling Track Hoists) are not subject to a Land charge and are thus not registered.



3. Chorley Council will require repayment of any DFG (or CAG) or any part thereof exceeding £5,000 up to the maximum £10,000 if the grant recipient disposes of the property within 10 years of the certified date.
4. The Council will consider in all cases whether it is reasonable to demand payment, having taken into account the reasons why the property is being disposed of, and the number of years that have passed since the certified date.
5. The Council will review each of the considerations set out in the Legal Conditions section before seeking repayment.

### **C3: Informing DFG/CAG applicants**

1. The Council will inform grant applicants at three stages of the application process:
  - When a referral is acknowledged
  - When a formal grant offer is made
  - When the grant funded work is completed

### **C4: Repayment**

1. When the Council is notified that a property which is subject of the relevant land charge is being disposed of within the grant condition period it will determine if it is reasonable to demand repayment of the grant by making enquiries of the owner/owner's solicitor.
2. Once the Council has the necessary information the HIA Team Leader will determine whether repayment is required and will notify the owner/owner's solicitor of the decision.

Report of	Meeting	Date
Director (Communities) (Introduced by Executive Member (Homes and Housing))	Executive Cabinet	Thursday 30 <sup>th</sup> March 2023

## Permission to consult on the revised Private Sector Housing Assistance Policy

Is this report confidential?	No
Is this decision key?	Yes
Savings or expenditure amounting to greater than £100,000	<b>Significant impact on 2 or more council wards</b>

### Purpose of the Report

1. To seek permission from Executive Cabinet to consult on the revised draft Private Sector Housing Assistance Policy, with a view to adopting the revised policy with effect from July 2023.
2. To outline the reasons for the key recommended changes in the revised draft Private Sector Housing Assistance Policy.

### Recommendations to Executive Cabinet

3. That Executive Cabinet approves the draft revised Private Sector Housing Assistance Policy for stakeholder consultation from April to June 2023, including consultation with the Equality Forum at their meeting on 20<sup>th</sup> June.
4. That any minor changes to the draft policy following the consultation can be approved by the delegated authority of the Executive Member (Homes and Housing). Any significant changes arising from the consultation would be brought back to Executive Cabinet on 13<sup>th</sup> July 2023.

### Reasons for recommendations

5. The existing Private Sector Housing Assistance Policy has been in place since June 2018 and is due for review. Certain aspects of the existing policy have either ceased (principally due to cessation of fixed term external funding) or are now being delivered differently.

6. The Government issued updated Disabled Facilities Grant (DFG) Delivery Guidance for Local Authorities in England in 2022 which the proposed policy seeks to reflect.

### **Other options considered and rejected**

7. As the Government has issued revised DFG Delivery Guidance it would not be appropriate to defer the revision of the Council's Private Sector Housing Assistance Policy.

### **Executive summary**

8. The report seeks permission to engage in stakeholder consultation on the draft revised Private Sector Housing Assistance Policy between April and June 2023.
9. The report notes that the draft revised policy has been compiled following publication of updated Government guidance to Local Authorities on the delivery of DFG.
10. The report requests that any minor changes to the policy after the consultation period are to be considered and approved by the delegated authority of the Executive Member (Homes and Housing).
11. The key policy proposals are set out in Table 1 within this report.
12. One HR implication within the suite of policy recommendations relates to the proposal to appoint (on a pilot project basis) an Occupational Therapist within the Home Improvement Agency (HIA) team. This option is to be addressed in more detail as an item at a future Executive Cabinet meeting.
13. There are no customer service implications within the report.

### **Corporate priorities**

14. The report relates to the following corporate priorities:

<b>Housing where residents can live well</b>	A green and sustainable borough
An enterprising economy with vibrant local centres in urban and rural areas	Healthy, safe and engaged communities

### **Background to the report**

15. The Council's existing Private Sector Housing Assistance Policy was introduced in April 2017, initially on a one-year pilot basis, before a further report to Executive Cabinet in June 2018 led to the policy being adopted longer-term.
16. Key to the existing and revised policy is a wish to be able to respond flexibly to our vulnerable residents by using the provisions of the Regulatory Reform (Housing Assistance) (England and Wales) Order 2002 (commonly known as the 'RRO') to widen the eligibility criteria for DFG, which is the only mandatory grant for which the Council has responsibility under this policy.
17. With the exception of DFG, which is a statutory function of the Council, the proposals set out in the report and in the draft revised policy in Appendix 1 are subject to the availability of funding and are provided at the Council's discretion.

18. The revised proposals address the revised DFG Delivery Guidance as well as taking into account other changes in the environment such as the inflationary pressures which are impacting adversely on the cost of providing adaptations.

#### **Impact of the current policy: widening eligibility criteria for DFG**

19. Under the existing policy, which has been in place initially since April 2017 (and endorsed on a longer term by Executive Cabinet in June 2018), the Council has been able to progress many more cases than would have been possible without the introduction of the 'Chorley Adaptation Grant' (the non-means tested counterpart to the conventional Disabled Facilities Grant).
20. From 2017 onwards the Chorley Adaptation Grant (CAG) has become the principle means of accessing a grant for major adaptations via Chorley Council. For example, in the current year to date, as at 15<sup>th</sup> March 2023, there have been 109 grant approvals of which 16 (15%) were DFG applications and 93 (85%) were CAG applications.
21. The CAG route is a streamlined application process, with a short application form and does not require applicants to disclose financial information. This is an important consideration, not simply in terms of widening eligibility criteria for those applicants who might have failed a financial assessment, but also in terms of encouraging people to come forward and seek assistance in the first place.
22. Prior to 2017 the HIA team encountered numerous residents who were reluctant to engage with the DFG assessment and application process because they were reluctant to disclose any financial information. With the use of the CAG these 'entry barriers' have receded and, as the figures indicate, the CAG option enables many residents to receive assistance and thus prolong their independence while remaining at home.

#### **Revised Private Sector Housing Assistance Policy: Funding and scope**

23. Since 2015 the Government has provided funding for DFG through the Better Care Fund. The Government provides ring-fenced DFG to BCF budget holders (which in Lancashire is LCC - Lancashire County Council). In 'two-tier' administrative areas within the county such as Chorley, District Councils administer DFG using the funding which LCC has a duty to pass on in its entirety unless otherwise agreed.
24. The levels of DFG funding by the Government have increased in recent years. When the current policy was adopted at the start of 2018/19, the national annual allocation for England was £523M. This has risen to £573M for the current year 2022/23 and funding commitments from the Treasury are in place to retain the same level of £573M for both 2023/24 and 2024/25.
25. In 2022/23 the Council has received a DFG allocation of £878,988 via the BCF, and it is anticipated that this level will continue in 2023/24 and 2024/25.
26. Such DFG funding commitments are useful in terms of boosting confidence that the Council will continue to be able to implement the non-statutory aspects of the Private Sector Housing Assistance Policy in coming years.

27. The revised policy proposals retain the principle of widening eligibility criteria, which have proven to be effective in the past 5 years in assisting residents who might have been ineligible for DFG assistance otherwise.
28. The revised proposals also incorporate a more holistic approach than simply the provision of major adaptations. Other services such as Handyperson, Affordable Warmth Assistance, Hospital Discharge Grant and Dementia Grant all seek to contribute to residents' wellbeing, independence and safety.
29. Wider determinants of Health in terms of standards of accommodation are addressed in the Housing Standards policy. Similarly, although the environmental agenda including Climate Change is not a major component of this policy, Affordable Warmth interventions are covered within this policy.

### Revised Private Sector Housing Assistance Policy: Key Proposals

30. **Table 1** below summarises the issue for each of the policy proposals, sets out the difference between them and the relevant clause in the existing policy, and offers an explanation as to why the item is being recommended.

**Table 1**

Issue	Existing Policy (since 2018)	Proposed Policy (from 2023)	Explanation
Discretionary DFG (in excess of mandatory maximum award)	Up to £10,000 can be added to the statutory maximum DFG award of £30,000 per application	Up to £20,000 can be added to the statutory maximum DFG award of £30,000 per application. <b>See draft policy: Appendix B, Section B1</b>	Reflects market conditions – inflation is continuing to affect cost of building materials
CBC Housing Strategy 2019-24	Existing policy pre-dates the adoption of the Housing Strategy	Is integrated with the CBC Housing Strategy 2019-24. <b>See draft policy: paragraph 1.0 'Introduction and Policy Aims'</b>	Demonstrates aligned aims and objectives
Integrated Home Improvement Services (IHIS)	IHIS was an LCC initiative started in 2015 and comprised funding provided to the Council for 'core' Home Improvement Agency (HIA) work, Handyperson service and Minor Adaptations. The funding ceased in March 2020.	The Handyperson service and the Minor Adaptations service are retained within the proposed policy. Handyperson services are funded by the Council. LCC funds the Minor Adaptation service, with the Council as its delivery agent in Chorley. <b>See draft policy: Appendix B, sections B5 and B7</b>	The proposed policy reflects the current position
Policy Monitoring	The policy states that	Proposal is for an interim	The proposed

	an annual review would be undertaken	review every two years and a full review two years after each interim review. <b>See draft policy: paragraph 9.0 'Monitoring, Review and consultation'</b>	intervals for reviewing the policy are a more realistic and achievable timeframe.
Occupational Therapist (OT) within the HIA team/Communities service	Existing policy does not contain this provision	Proposal to engage an OT on a pilot basis within the HIA/Communities service. <b>See draft policy: paragraph 5.3 'Applying for Assistance'</b>	To facilitate a more responsive assessment process which can also link in more effectively with other support services available within the Council
<b>Issue</b>	<b>Existing Policy (since 2018)</b>	<b>Proposed Policy (from 2023)</b>	<b>Explanation</b>
Application forms available online	Existing policy does not contain this provision	Proposal to place application forms online. <b>See draft policy: paragraph 5.5 'Applying for Assistance'</b>	To enable fairer and wider access to information
Cases which fall outside the policy	Existing policy allows the Council 'in exceptional circumstances to adopt a more flexible approach to offer other adaptation items that are not available under DFG'	Proposal to give delegated authority to Director of Communities to authorise funding for adaptations in exceptional circumstances (eg applicants failed DFG financial assessment but can demonstrate that hardship would result from assistance not being provided) <b>See draft policy: Paragraph 6.0 'Cases which fall outside the policy'</b>	Clarifies and confirms the Council's commitment to seeking to assist where possible
Key Performance Indicators (KPIs)	Existing policy does not contain local KPIs	Proposal to include local KPIs within the revised policy (these are already in place and are reported to Senior Management) <b>See draft policy: paragraph 10.0 'Key Performance Indicators'</b>	Provides clarity and transparency to service users and the wider public about the Council's targets relating to the operation of this policy.
Hospital Discharge	Existing policy does	Proposal to offer grant to	Helps to address

Grant	not contain this provision	assist residents whose home needs urgent work to facilitate safe discharge. <b>See draft policy Appendix B, Section B.3</b>	Better Care Fund priority of more timely discharge of patients from hospital/care
Dementia Grant	Existing policy does not contain this provision	Proposal to support residents with dementia diagnosis preventatively before condition escalates to a DFG being required. Small modifications to help a person to stay safely at home for longer. <b>See draft policy: Appendix B, Section B.4</b>	Assists residents to stay at home independently for longer while managing pressure on DFG budget. It is a recommendation in the updated DFG Delivery Guidance
<b>Issue</b>	<b>Existing Policy (since 2018)</b>	<b>Proposed Policy (from 2023)</b>	<b>Explanation</b>
Affordable Warmth Assistance	Existing policy does not contain this provision	Proposal to retain this existing service <b>See draft policy: Appendix B, Section B.6</b>	To provide boiler servicing and associated assistance to enable qualifying residents to achieve affordable warmth
DFG Professional fee reimbursement	Existing policy allows for costs of private OT assessment to be reimbursed to an applicant if a DFG award is made.	Proposal to confirm that the costs of a private OT assessment (typically £200) can be reimbursed to an applicant even if a DFG grant is not actually awarded – eg if recommended adaptation proves to be technically unfeasible <b>See draft policy: Appendix A, Section A5</b>	Equitable treatment of DFG applicants
Council Tax Support as a 'qualifying benefit'	Existing policy does not address this issue	Proposal to treat applicants in receipt of Council Tax Support as having a qualifying benefit for the purposes of DFG. <b>See draft policy: Appendix A, Section A17</b>	Equitable treatment of DFG applicants. Council Tax Benefit (until discontinued by the Government) was a qualifying benefit for DFG. Council Tax Support is its replacement and Councils have discretion under the Regulatory

			Reform Order (RRO) whether as to whether to classify it as a DFG qualifying benefit.
Conversion of DFG referral to CAG referral	Existing policy does not address this issue	Proposal to permit the conversion of a DFG referral into a CAG in certain circumstances <b>See draft policy: Appendix B, Section B2 'Conditions'</b>	Equitable treatment of DFG applicants
Repayment of DFG	Existing policy notes the legislation in respect of Land Charges and the facility to seek repayment of DFG in certain circumstances	Confirmation of the Council's position in terms of its application of the legislation <b>See draft policy: Appendix C</b>	Provides clarity and transparency to service users and the wider public about how the Council administers this policy.

### Climate change and air quality

31. The work noted in this report has an overall positive impact on the Council's Carbon emissions and the wider Climate Emergency and sustainability targets of the Council.
32. In particular, the report impacts on the following activities highlighted **in bold**:
  - a. net carbon zero by 2030,
  - b. **energy use** / renewable energy sources
  - c. waste and the use of single use plastics,
  - d. sustainable forms of transport,
  - e. **air quality**,
  - f. flooding risks,
  - g. green areas and biodiversity.
33. The following mitigation measures have been undertaken to limit the environmental impact:

### Equality and diversity

34. The policy proposals outlined in this report serve to assist eligible residents in accordance with the protected characteristics set out in the Equality Act. The inclusion of funding for discretionary services which go beyond the statutory minimum provision required within the DFG legislation help to ensure that services which are delivered or facilitated under this policy are administered in accordance with Equality Act principles.

### Risk

35. The lack of available funding to offer the non-statutory elements of this policy is the key risk. However, this is mitigated by the existence of Treasury funding commitments over the years 2023/24 and 2024/25 as well as the policy document clearly stating that the discretionary features of the policy are subject to funding availability and may be withdrawn at any time without notice.



### **Comments of the Statutory Finance Officer**

36. The proposals represent a reflection of current price increases and the potential need for increased discretionary awards on DFGs. The capital programme reflected the DFG funding received and overall spend is kept within allocations received.

### **Comments of the Monitoring Officer**

37. The report seeks authority to go out for a period of consultation on a proposed revised/updated policy. This policy is designed to be consistent with the recently published DFG Delivery Guidance published from Government.
38. The DFG element of the policy is a statutory function. Both County and District councils have a role to play in this regard. Other provisions in the policy are discretionary. They are designed to enable us to respond flexibly to the needs of our vulnerable residents. Services provided include the Handy Person service and the Hospital Discharge Grant.
39. There are no Monitoring Officer's concerns with what is proposed here.

### **Background documents**

Disabled Facilities Grant (DFG) delivery: Guidance for Local Authorities in England (2022)

[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/1065574/DFG\\_Guidance.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1065574/DFG_Guidance.pdf)

### **Appendices**

Appendix 1 'Private Sector Housing Assistance Policy 2023': Draft for Consultation

Report Author:	Email:	Telephone:	Date:
Martin Sample (Housing Team Leader (Private Sector/Home Improvement))	martin.sample@chorley.gov.uk	01257 515704	16/3/23

This decision will come into force and may be implemented five working days after its decision date, subject to being called in in accordance with the Council's Constitution.