

RETIREMENT HOUSING RESEARCH REPORT

Throughout this report and the subsequent appendices scheme names are abbreviated as follows:

| | |
|------|--|
| ALD | Alderman Howe Lodge, Highwoods, Colchester |
| COL | Colne House, Heybridge, Maldon |
| COP | Coppins Road, Clacton-On-Sea |
| IRON | Ironside Walk, Colchester Road, Manningtree |
| JOHN | John King Court, High Street, Brightlingsea |
| KNI | Knights Close, Tolleshunt Knights |
| NEW | New Farm Lodge, Winstree Road, Stanway, Colchester |
| ORCL | Orchard Lodge, Station Road, Tiptree |
| PRI | Priors Court, Priors Way, Southminster |

SECTION ONE – BUILDINGS

Year Built

| | ALD | COL | COP | IRON | JOHN | KNI | NEW | ORCL | PRI |
|-------------------|------|------|------|------|------|------|------|------|------|
| Built | 1985 | 1986 | 2003 | 1991 | 1991 | 1994 | 1986 | 1987 | 1994 |
| Remodelled | | | | 2003 | | | | | |

Number & type of units

| | ALD | COL | COP | IRON | JOHN | KNI | NEW | ORCL | PRI | Total |
|-------------------|-----|-----|-----|------|------|-----|-----|------|-----|-------|
| 1B1P flats | 20 | 22 | - | 31 | 18 | - | 22 | 22 | - | 135 |
| 1B2P flats | 10 | 2 | - | 9 | 2 | - | 2 | 2 | - | 27 |
| 2B flats | 3 | - | - | - | 1 | - | - | - | - | 4 |
| 1B2P bung | - | - | 4 | - | - | 9 | - | - | 6 | 19 |
| 2B bung | - | - | - | - | - | 2 | 5 | - | - | 7 |
| Total | 33 | 24 | 4 | 40 | 21 | 11 | 29 | 24 | 6 | 192 |

Wheelchair accessible units

| | ALD | COL | COP | IRON | JOHN | KNI | NEW | ORCL | PRI | Total |
|---------------|-----|-----|-----|------|------|-----|-----|------|-----|-------|
| No. | 1 | 1 | - | 16 | 1 | - | 1 | 1 | - | 21 |
| % Prop | 3% | 4% | - | 40% | 5% | - | 3% | 35 | - | 11% |

Level access showers

| | ALD | COL | COP | IRON | JOHN | KNI | NEW | ORCL | PRI | Total |
|---------------|-----|-----|-----|------|------|-----|-----|------|-----|-------|
| No. | 15 | 11 | - | 20 | 11 | 2 | 11 | 13 | - | 83 |
| % Prop | 45% | 46% | - | 50% | 52% | 18% | 38% | 54% | - | 43% |

Of those converted 9 have been completed via Disabled Facilities Grants and 16 were carried out as part of the remodelling at Ironside Walk (phase 2).

SECTION TWO – DEMAND & DEMOGRAPHICS

Age profile

| | ALD | COL | COP | IRON | JOHN | KNI | NEW | ORCL | PRI | Total |
|-------|-----|-----|-----|------|------|-----|-----|------|------|-------|
| 55-59 | 1 | 2 | - | - | - | - | - | - | - | 3 |
| 60-64 | 1 | 3 | - | - | 1 | 1 | 1 | 1 | 1 | 9 |
| 65-69 | 3 | 3 | 1 | 1 | 2 | 2 | 1 | - | - | 13 |
| 70-74 | 4 | 5 | 1 | 1 | 5 | 4 | 1 | 3 | - | 24 |
| 75-79 | 8 | 3 | 2 | 4 | 3 | 3 | 3 | 3 | - | 29 |
| 80-84 | 7 | 1 | - | 8 | 5 | - | 5 | 3 | 3 | 32 |
| 85-89 | 6 | 5 | - | 8 | 4 | 1 | 12 | 8 | 2 | 46 |
| 90+ | 3 | 2 | - | 9 | 1 | - | 6 | 6 | - | 27 |
| Ave | 79 | 75 | 73 | 84.5 | 78 | 73 | 85 | 84 | 79.5 | 80.5 |

Note – we only hold data on the 31 residents at Ironside Walk who are CHS tenants. Overall, the greatest number of tenants are aged 85 – 89 (24%), with another 14% aged 90 – 100 (2 residents this year).

Waiting List Profile (Jan 08)

| | ALD | COL | COP | IRON | JOHN | KNI | NEW | ORCL | PRI | Total |
|-------|------|------|------|------|------|------|------|------|-----|-------|
| Sing | 19 | 10 | 24 | 18 | 15 | 18 | 26 | 19 | 10 | ? |
| Coup | 7 | 1 | 15 | 8 | 13 | 13 | 15 | 7 | 2 | ? |
| Total | 26 | 11 | 39 | 26 | 28 | 31 | 41 | 26 | 12 | 120 |
| Ratio | 0.78 | 0.45 | 9.75 | 1.08 | 1.4 | 2.81 | 1.41 | 1.08 | 2 | 0.625 |

Note – there were 120 applications in total for sheltered housing as at January 2008. Some applicants have chosen multiple schemes. The “all applicants” report giving the total figure does not identify single people and couples separately.

The final row shows the number of interested applicants there are for every unit of accommodation at the scheme. We currently hold 0 applications for extra-care, so the Ironside figure is based on phase 1 only. Demand is weakest at Colne House and greatest at the bungalow schemes.

Lettings history 2003 – 08

| | ALD | COL | COP | IRON | JOHN | KNI | NEW | ORCL | PRI | Total |
|-------|-----|-----|-----|------|------|-----|-----|------|-----|----------------------|
| 03/04 | 3 | 3 | 4 | 13 | 1 | 0 | 2 | 3 | 0 | 28 re-lets 32 tot |
| 04/05 | 2 | 9 | 1 | 12 | 9 | 1 | 4 | 2 | 0 | 33 re-lets 40 tot |
| 05/06 | 2 | 2 | 0 | 2 | 5 | 1 | 3 | 2 | 1 | 18 |
| 06/07 | 3 | 3 | 0 | 5 | 2 | 1 | 1 | 1 | 0 | 16 |
| 07/08 | 4 | 4 | 0 | 9 | 2 | 2 | 3 | 3 | 2 | 29 |
| Ave | 3.4 | 4.2 | 1 | 8.2 | 3.8 | 1 | 2.6 | 2.2 | 0.6 | |

Note – the figure for Alderman Howe Lodge this year includes 1 new let (former staff accommodation). There were 16 new extra-care lettings at Ironside Walk between January 2003 and December 2004 (9 in 03/04 and 7 in 04/05). The total of 29 new lets excludes four current or imminent voids that are not yet let.

Turnover rates 2003 – 08

| | ALD | COL | COP | IRON | JOHN | KNI | NEW | ORCL | PRI | Total |
|-------|-----|-----|-----|------|------|-----|-----|------|-----|-------|
| 03/04 | 19% | 13% | - | 17% | 5% | 0% | 7% | 13% | 0% | 16% |
| 04/05 | 6% | 38% | 25% | 21% | 43% | 8% | 14% | 8% | 0% | 19% |
| 05/06 | 6% | 8% | 0% | 4% | 24% | 8% | 12% | 8% | 17% | 9% |
| 06/07 | 9% | 13% | 0% | 13% | 10% | 8% | 3% | 4% | 0% | 8% |
| 07/08 | 12% | 17% | 0% | 23% | 10% | 18% | 10% | 13% | 33% | 15% |
| Ave | 11% | 18% | 6% | 15% | 18% | 9% | 9% | 9% | 10% | |

Notes – the overall average figures at Coppins Road excludes the initial lettings. The data relating to 2003/04 and 2004/05 at Ironside Walk excludes the new extra-care lettings.

Refusals 2007/08

| | ALD | COL | COP | IRON | JOHN | KNI | NEW | ORCL | PRI | Total |
|-------------|-----|-----|-----|------|------|-----|-----|------|-----|----------------------|
| Ave per let | 0.5 | 1 | N/A | 0 | 1 | 1 | 3 | 1 | 0 | 14 refusals in total |

Notes –

- ALD applicant wanted ground floor only but had not specified this on her form.
- COL 2 refusals for unknown reasons and 1 where CHS withdrew the offer having discovered the applicant had made false statements on his application.
- IRON all accepted on first offer, but extra care lets are made via panel so refusals are very unlikely.
- JOHN applicant decided she did not want sheltered housing after all.
- NEWF data is skewed by one recent void which had 6 CBL refusals and 2 HWL refusals.
- ORCL one refusal for unknown personal reasons.

Post-tenancy destination 2007/08

| | ALD | COL | COP | IRON | JOHN | KNI | NEW | ORCL | PRI | Total |
|-------------|-----|-----|-----|------|------|-----|-----|------|-----|-------|
| Died | 2 | 3 | N/A | 4 | 1 | 0 | 1 | 1 | 1 | 13 |
| Res care | 1 | 0 | N/A | 6 | 1 | 1 | 2 | 1 | 0 | 12 |
| Other shelt | 1 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 1 | 3 |
| Other ind | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

Notes – one “other sheltered” relates to an internal transfer. Total of 28 excludes the one new let at ALD33. No-one has moved out to more independent living this year; however this has occurred once or twice in the last 7 years.

Hospital admissions

| | ALD | COL | COP | IRON | JOHN | KNI | NEW | ORCL | PRI | Total |
|-----------------|-----|-----|-----|------|------|-----|-----|------|-----|-------|
| No. of res adm. | 11 | 4 | ? | 4 | 4 | ? | 5 | 9 | ? | 37 |
| No. of adm. | 17 | 4 | ? | 9 | 5 | ? | 7 | 9 | ? | 51 |

Notes – 37 separate residents were admitted 51 times (1.4 times per person on ave). Some admissions were repeated as follows:

- ALD - 5 tenants in 8 times for 1-3 days & 6 tenants in 9 times for 1-22 wks
- COL - 4 (1 admission each), 1 for 6 months, 1 for 2 wks & 2 for 3 wks each
- JOH - 4 residents admitted to hosp on 5 occasions. 2 residents short stays. 1 one week for op. 1 A&E then onto res care. 3 long stay. 1 do not know length as in when I started (No record in tenants notes and resident cannot remember) came home a week after I started. Another admitted then died a month late in hops and 1 resident still in hosp.
- NEWF - 5 people on 7 occasions (8 wks, 4 wks, 1 wk, 2 overnights and 1 went in 2nd January and is still in, 1 went in 27th January and is still in).
- ORCL – 5 residents in for 7 days, 1 resident in for 3 weeks, 1 resident in for 2 weeks, 1 resident in for 10 days & 1 resident in for 1 month.

Ironside Walk notes are as follows:

Tenant Mr G – admitted August 2007 (21 days), readmitted September 2007 (25 days), readmitted November 2007 until January 2008 when discharged to a care home and passed away there January 2008.

TDC tenant - diagnosed with cancer in late 2006, admitted to hospital in December 2006, discharged in March 2007, readmitted in June, discharged to nursing home in September and passed away in January 2008.

Tenant Mrs E - ambulance called several times but not admitted until July 2007, discharged two weeks later, returned in early August and immediately discharged, finally readmitted in early October and passed away a few days later.

Tenant Mrs N - admitted to A & E in November 2007 with vomiting and severe pain, passed away unexpectedly later the same day.

Tenant Mrs T – was admitted to hospital in September 2007 a day before tenancy sign-up. Tenancy signed in hospital at tenants request as planned to return home but was not discharged til November. Only spent three weeks at home before admission to residential care.

SECTION THREE – LOCAL COMMUNITY

Other sheltered housing provision within 3km of postcode

| | ALD | COL | COP | IRON | JOHN | KNI | NEW | ORCL | PRI |
|----------------------|-----|-----|-----|------|------|-----|-----|------|-----|
| No of units | 220 | 350 | 374 | 40 | 0 | 37 | 192 | 37 | 36 |
| No of schemes | 8 | 13 | 9 | 1 | 0 | 2 | 7 | 2 | 2 |

Source: www.housingcare.org

Notes –

- ALD -115 units are managed by Colchester Borough Homes (CBH), with the remainder split between Springboard, Hanover and the Balkerne Gardens Trust. One extra-care scheme at Fivefields Court.
- COL - 289 units are managed by Moat Housing, with the remainder with the Salvation Army and Maldon Housing Association.
- COP – being in the centre of Clacton means there is a large number of schemes, mostly managed by large national providers including Housing 21, Anchor Trust and Hanover (including 1 extra-care scheme). TDC still manage 56 units (2 schemes).
- IRON – the only other sheltered scheme is Honeycroft, a TDC scheme.
- JOHN – the closest scheme is 4km away in St Osyth.

- KNI – 11 bungalows adjoin our scheme and are managed by Moat. The remaining units are at Maytree Court, a sheltered scheme managed by Colchester Borough Homes in Tiptree.
- NEWF – 146 units managed by CBH, including one extra-care scheme. Shaftesbury manages one extra-care scheme and the remainder are Hanover.
- ORCL – same as Knights Close.
- PRI – in addition to the scheme adjoining ours and managed by Moat, the remaining scheme is linked to Priors Way and also managed by Moat.

Distance to local services and amenities in yards/miles

| | ALD | COL | COP | IRON | JOHN | KNI | NEW | ORCL | PRI |
|------------|-----------|---------------|-----|------------|----------|-----|-----------|----------|-----|
| GP | 100 yds | Within 1 mile | ? | 250 yds | 0.5 mile | ? | Next door | 600 yds | ? |
| Dentist | 100 yds | Within 1 mile | ? | 0.25 mile* | 1 mile | ? | 0.9 mile | 500 yds | ? |
| Optician | 3.5 miles | 2 miles* | ? | 0.25 mile* | 0.5 mile | ? | * | 500 yds | ? |
| Hospital | 2 miles | 2.5/14 miles | ? | 12 miles | 15 miles | ? | 4.1 miles | 13 miles | ? |
| Day Centre | 1 mile | 0.5 mile | ? | On site | 1 mile | ? | 0.75 mile | 0.5 mile | ? |
| Bus Stop | 50 yds | 0.5 mile | ? | 50 yds | 100 yds | ? | 0.25 mile | 100 yds | ? |
| Shops | 500 yds | 0.5 mile | ? | 500 yds* | 100 yds | ? | 0.9 mile | 500 yds | ? |
| Pub | 0.5 mile | 1 mile | ? | 100 yds | 50 yds | ? | 0.75 mile | 200 yds | ? |

Notes –

COL – St Peters (2.5 miles) has no A&E.

* indicates a home visiting service.

SECTION FOUR – ACTIVITIES & SERVICES

Alderman Howe Lodge

| | AM | PM | Eve |
|------|------------------------|---|-----|
| Mon | | Bingo (alternate weeks) Keep Fit | |
| Tues | Coffee morning | | |
| Wed | | Knitting club | |
| Thur | | Special events e.g. music, quizzes, luncheon | |
| Fri | | | |
| Sat | | | |
| Sun | Monthly church service | | |

Notes –

- up to half a dozen non-residents attend Bingo and Keep Fit (mostly from local category 1 sheltered schemes)
- annual coach trips (average 2 a year) includes non-residents
- seasonal events e.g. strawberry tea, Easter celebration, harvest festival & Christmas
- Mobility store & shoe shop come into twice a year

Colne House

| | AM | PM | Eve |
|------|---|--|-----|
| Mon | Exercise and Falls prevention session, followed by slimming / weigh-in club and healthy eating advice | Card games | |
| Tues | | Bingo followed by Fish and Chip Supper | |
| Wed | | Card games | |
| Thur | | Tenants can attend local lunch club | |
| Fri | Hairdresser Mobile library - fortnightly | | |
| Sat | | | |
| Sun | | | |

Notes –

- Parties / get together when ever there is something to celebrate
- Monthly Coffee mornings and Raffles
- Monthly trips out (either pub lunch, superstore shopping etc) using community transport that can accommodate wheelchairs fixed or folded
- 6 weekly – chiropodist visit
- Bi annual -visiting mobile clothes shop
- Bi annual- visiting shoe shop
- Annual – visiting mobility shop

Ironsides Walk

| | AM | PM | Eve |
|------|---|--|-----------------------|
| Mon | Community transport collects IW tenants for social club | Community Volunteer Bureau (community room) Bingo | |
| Tues | Transport collects from IW to monthly lunch club | Community 60+ Club (monthly) | Community Whist Drive |
| Wed | Coffee Morning | Community Bingo Fish 'n' chip lunch (monthly) | |
| Thur | | Monthly retail clothing/ disability equipment | |
| Fri | Community Rendezvous Coffee Morning | Poetry & Book Group Monthly Sing-along | |
| Sat | | | Community Whist Drive |
| Sun | | | |

Notes –

Voluntary Sector & Community provide the following events throughout the year which result in additional one off monthly events:

- Summer garden parties (2) with live bands
- Summer strawberry teas
- Quiz night
- Fashion show
- Jumble sale

- Coach trips out (3)
- other evening events such as Taize
- Christmas events (15-20)

John King Court

| | AM | PM | Eve |
|------|----------------|----|-----|
| Mon | | | |
| Tues | Coffee morning | | |
| Wed | | | |
| Thur | | | |
| Fri | | | |
| Sat | | | |
| Sun | | | |

New Farm Lodge

| | AM | PM | Eve |
|------|--------------------------------|-------------------------------|-------|
| Mon | Coffee morning Baker visits | | |
| Tues | Greengrocer visits | Informal tea & chat in lounge | |
| Wed | | Informal tea & chat in lounge | |
| Thur | Baker visits | | Bingo |
| Fri | Hairdresser | | |
| Sat | | | |
| Sun | | | |

Notes –

- Most afternoons someone is in the communal lounge for a cup of tea and a chat
- Twice a year Clothes shop and shoe fitter
- New Year, Easter, Strawberry Tea, Halloween and other celebrations
- Pet Therapy Lady comes in with her dog every couple of months.
- Local PCSO'S visit on coffee mornings
- Chiropodist every 8 weeks (in their flats)

Orchard Lodge

| | AM | PM | Eve |
|------|---|----------------------------|-----|
| Mon | | Keep fit | |
| Tues | | | |
| Wed | Coffee morning CoE service 1 st Wed each month | Quiz starting up | |
| Thur | Hairdresser | | |
| Fri | | Fish & Chip Lunch Bingo | |
| Sat | | | |
| Sun | | | |

Notes –

- Seasonal summer/hallowe'en events
- Ad-hoc raffles, auctions, Christmas parties

SECTION FIVE – CARE

Residents known to be receiving care (social care or private)

| | ALD | COL | COP | IRON | JOHN | KNI | NEW | ORCL | PRI | Total |
|-------|-----|-----|-----|------|------|-----|-----|------|-----|-------|
| No. | 3 | 7 | ? | 18 | 4 | ? | 6 | 4 | ? | 42 |
| Prop. | 9% | 29% | ? | 45% | 19% | ? | 12% | 17% | ? | 22% |

Residents paying for informal care/private cleaning services (in addition to those above)

| | ALD | COL | COP | IRON | JOHN | KNI | NEW | ORCL | PRI | Total |
|-------|-----|-----|-----|------|------|-----|-----|------|-----|-------|
| No. | 12 | 4 | ? | 9 | 7 | ? | 4 | 7 | ? | 43 |
| Prop. | 36% | 17% | ? | 23% | 33% | ? | 14% | 29% | ? | 22.5% |

SECTION SIX – FINANCE

Support costs

| | ALD | COL | COP | IRON | JOHN | KNI | NEW | ORCL | PRI |
|----|-----|-----|------|------|------|-----|-----|------|-----|
| SP | 94% | 88% | 100% | 55% | 92% | 87% | 91% | 63% | 81% |
| HB | 6% | 12% | - | 45% | 8% | 13% | 9% | 37% | 19% |

Profit & Loss (in £ YTD Jan 08)

| | ALD | COL | COP | IRON | JOHN | KNI | NEW | ORCL | PRI | Total |
|------|--------|-------|-------|--------|-------|-------|--------|-------|-------|--------|
| Inc | 127006 | 96048 | 10639 | 190423 | 84734 | 40480 | 113900 | 93452 | 23957 | 780639 |
| Exp | 68245 | 70085 | 1125 | 144559 | 52947 | 10613 | 30078 | 81435 | 7404 | 474491 |
| Surp | 58761 | 25963 | 9514 | 45864 | 31787 | 29867 | 75822 | 12017 | 16553 | 306148 |

SECTION SEVEN – TENANT SATISFACTION

Landlord Overall

| ALD | COL | COP | IRON | JOHN | KNI | NEW | ORCL | PRI | CHS Ave | NHF Ave |
|-------|------|-----|------|------|-----|-------|------|-----|---------|---------|
| 89.3% | 100% | N/A | 100% | 100% | N/A | 96.3% | 100% | N/A | 97% | 89% |

Value for Money

| ALD | COL | COP | IRON | JOHN | KNI | NEW | ORCL | PRI | CHS Ave | NHF Ave |
|-------|-------|-----|-------|-------|-----|-------|------|-----|---------|---------|
| 85.7% | 94.7% | N/A | 94.4% | 94.1% | N/A | 88.9% | 85% | N/A | 90% | 88% |

Accommodation

| ALD | COL | COP | IRON | JOHN | KNI | NEW | ORCL | PRI | CHS Ave | NHF Ave |
|-------|-------|-----|------|-------|-----|-------|------|-----|---------|---------|
| 96.4% | 94.7% | N/A | 100% | 94.1% | N/A | 96.3% | 100% | N/A | 97% | 93% |

Condition of Property

| ALD | COL | COP | IRON | JOHN | KNI | NEW | ORCL | PRI | CHS Ave | NHF Ave |
|-------|-------|-----|------|-------|-----|-------|------|-----|---------|---------|
| 92.9% | 94.7% | N/A | 100% | 94.1% | N/A | 96.3% | 95% | N/A | 96% | 92% |

Area/Neighbourhood

| ALD | COL | COP | IRON | JOHN | KNI | NEW | ORCL | PRI | CHS Ave | NHF Ave |
|-------|-------|-----|------|------|-----|-------|------|-----|---------|---------|
| 89.3% | 89.5% | N/A | 100% | 100% | N/A | 96.3% | 100% | N/A | 94% | 90% |