

Elizabeth House Sheltered Scheme Appraisal

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Executive summary

Background

1. Elizabeth House is a sheltered scheme in Cheam Village which comprises a number of single and two storey blocks containing a range of unit sizes although predominantly single person accommodation, much of which is provided in bed sits.
2. The Council's 2001/02 Best Value Review of Sheltered Housing recommended a programme of strategic reviews of each sheltered housing scheme in the borough. The review of the Elizabeth House sheltered housing scheme identified that it was no longer fit for purpose.
3. The London Borough of Sutton commissioned Tribal in November 2008 to undertake an appraisal of the options to regenerate the Elizabeth House Sheltered Housing Scheme.

Brief

4. Tribal were required to inspect the site and provide a report setting out a high level analysis comparing the suitability of refurbishment against demolition and the provision of new homes on the site.
5. The report was required to take account of a range of factors including the Council's aspiration to provide housing that more effectively meets the needs of the borough's ageing population, makes best use of the site, improves the quality of life for existing and future residents and is best able to respond to likely future needs.

Key Findings

6. There is a recognition of the importance of developing specialist housing designed to accommodate people with a range of lifestyle, health and care needs to the extent that deteriorating general health should no longer be the sole reason for moving home. The report sets out the standards required/desired for these types of housing, along with the needs in the borough, and goes on to say how the existing scheme meets those standards and needs.
7. Having established that the current Elizabeth House scheme fails to meet most of the current design standards and does not appropriately address need, the report examines how far refurbishment or redevelopment can address the problems and maximise the opportunities presented by the existing scheme in order to meet the identified requirements and need.
8. The report finds that in nearly all instances redevelopment fully achieves the key identified requirements and needs, which the Council is looking for from a regenerated housing scheme, whereas in most cases refurbishment will only partially achieve those same requirements and needs.

Conclusion

9. In summary, the report concludes that redevelopment is the most appropriate means of delivering improved older people's housing on this site.
10. In particular it will provide housing with a significantly longer lifetime, that will more effectively meet existing needs and has greater flexibility to adapt to changing future needs and demands of an ageing population. It will also provide a wider development which functions better, is more attractive, makes better use of its location, is more energy efficient and sustainable, and fits in better with (and potentially enhances) the surrounding area. It will also increase the supply of a type of housing which is much in need.

11. Refurbishment will not be able to provide fully sheltered and extra care housing to current standards and will result in a scheme that will only be suitable for a limited range of older people – excluding many of those with significant care needs, and requiring existing residents to move elsewhere if and when they develop those needs.

1 Introduction

1.1 Our brief

1.1.1 The London Borough of Sutton commissioned Tribal in November 2008 to undertake an appraisal of the options to regenerate the Elizabeth House sheltered housing scheme in Cheam Village. The commission is for an independent review on the best way forward to regenerate the site to provide accommodation for older and vulnerable people.

1.1.2 Tribal were required to inspect the site and provide a report setting out a high level analysis comparing the suitability of refurbishment against demolition and the provision of new homes on the site. This analysis is a technical analysis and there was not a requirement to undertake consultation to get opinions of residents within or outside the scheme, or other stakeholders such as councillors or council officers.

1.1.3 The report takes account of the following:

- The Council's aspiration to provide a mix of extra care and sheltered accommodation to meet the needs of its ageing population
- The Council's aim of providing homes where tenants (including couples) will be able to take up occupation and live as long as possible without having to move due to increased frailty or being in need of caring services
- The need for DDA (Disability Discrimination Act 1995) compliance – with level/lift access throughout the scheme and easily accessible communal facilities
- The need to provide up to date property standards, including each tenancy having separate bathrooms, bedrooms and kitchens
- Best Value, including maximising the life of properties and making the best use of the available site
- The financial and practical implications/feasibility of a phased refurbishment or new build programme for the existing tenants and a prospective developer¹
- Maximising the opportunities to secure funding for the works
- The impact of the completed works/dwellings on the environment and conservation area
- The Council's Core Values
- The Council's wish for all existing residents to be guaranteed a tenancy of one of the refurbished or replacement homes

1.2 Existing scheme description

1.2.1 The Elizabeth House sheltered scheme (see plan at Appendix A) comprises a number of single and two storey blocks containing a range of unit sizes although predominantly single person accommodation. Specifically the existing scheme comprises 34 bedsits in

¹ The outcomes of some of the financial analysis contained within this report, although high level, may be commercially sensitive in the event that the Council looks to dispose of the scheme to a third party.

the main building, 2 residential staff properties, 17 bedsit bungalows, 1 three bed roomed bungalow and 28 one bed roomed flats in Mickleham Gardens, Pond Hill Gardens and Malden Road. A total of 82 units and 2 guest bedrooms.

- 1.2.2 Location is excellent within close proximity of village amenities, Cheam Park and, due to the restricted vehicle and pedestrian access, the scheme has a relative sense of self containment and privacy.
- 1.2.3 Elizabeth House itself is the largest building on the site, comprising three parallel blocks linked by a main block. The building steps up the sloping site towards Malden Road resulting in changes of floor level within the building. The communal facilities are located within the central block at the southern edge of the site, which it should be noted are some distance from many of the bungalows and flats. Externally, the building has been designed to make reference to the language of the traditional vernacular architecture of the surrounded listed buildings and conservation area through a replication of the horizontal painted timber boarding – using what appears to be a fibre cement panel.
- 1.2.4 The bungalows and flats are typical post war structures of load bearing brickwork with concrete access decks and steel single glazed ‘Crittall’ type windows. They are generally in reasonable condition but very unlikely to conform to current building regulations standards. Many of the properties are accessed via steps or staircases making them unsuitable for residents with disabilities or restricted mobility. Several properties have been modified to provide mobility access but still appear unlikely to conform to current standards.
- 1.2.5 Due to the nature of the linear blocks and the way in which they are located on the site, large areas of open space exist between and around the blocks of accommodation. This serves to make the site feel open and of a low density. Although the site layout allows views and visual links through to Cheam Park, it is unfortunate that more of the units do not address the park more directly.
- 1.2.6 The site contains many mature trees that greatly enhance the visual amenity of the scheme. It is important that any possible future options ensure they are retained wherever possible and incorporated into the scheme.
- 1.2.7 The council also owns other properties adjacent to the site at 1 Pond Hill Gardens, 1, 2 and 3 Cheam Park Way and adjacent garages which may enhance the viability of the site and have therefore also been included in the review.

1.3 Context

- 1.3.1 The site lies close to the heart of Cheam Village, just to the north of the village centre along The Broadway. Cheam Village is a predominantly residential suburban area.
- 1.3.2 Directly to the west of the site, on the other side of Cheam Park Way, is Cheam Park. Cheam Park is a public park (designated in the Unitary Development Plan as Metropolitan Open Land), which backs onto neighbouring Nonsuch Park.
- 1.3.3 Part of the site lies within the Cheam Village Conservation Area, which is 1 of 14 Conservation Areas within the Borough. Conservation Area designation aims to protect the area's character and appearance by managing change in a sympathetic way, which is conducted through Town Planning Legislation and Local Planning Policies. A character analysis and management plan is currently proposed for the Cheam Park Conservation Area, which will inform the Local Development Framework policies for the area. The site is bounded to the south (along the opposite side of Park Lane) and east (backing onto the site on the same side of Malden Road) by a large number of listed buildings.

- 1.3.4 Most of the sheltered accommodation is in the centre of the borough with only one other development in Cheam. This other development is a small scheme in a converted house in Mulgrave Road, consisting of seven bedsits.
- 1.3.5 The Council's 2001/02 Best Value Review of Sheltered Housing recommended a programme of strategic reviews of each sheltered housing scheme to review and improve the standard and use of the Council's available social rented housing for older people and enable older people to be supported and cared for within these settings for longer. The Elizabeth House review identified that it was no longer fit for purpose. In May 2003 the Social Care Services Performance Committee subsequently agreed "That further work be carried out to assess the potential of the site to provide new high quality accommodation for older people". The regeneration of the Elizabeth House sheltered scheme was then included in the Council's 2008/9 Housing Strategy and in the Sutton Housing Partnership Asset Management Strategy.

2 Sheltered and Extra Care Housing Standards

2.1 Introduction

2.1.1 The Council have indicated that there is a requirement for both sheltered housing and extra care housing to be provided on the site in order to appropriately address housing need. They have also indicated a specific requirement for flats for adults with learning disabilities and physically disabled people.

2.1.2 Therefore in order to analyse the ability of the refurbishment and redevelopment options to successfully deliver these types of housing, we have first identified the standards required/desired for these types of housing.

Sheltered Housing

2.1.3 Sheltered housing is the name given to a type of housing designed to meet the needs of older people. It appeals to people who can live independently but who want the reassurance of knowing that help is available if needed.

2.1.4 Definitions about what is specifically meant by sheltered housing vary and the concept has evolved over time. When sheltered housing was first being developed it tended to include only very small housing (often bedsits) with a resident warden (who provided "friendly neighbour" services). Such schemes have, over time, diminished in their popularity. The consequence is that in some areas this particular type of sheltered housing is now in low demand and there is little articulated "need" to build new schemes of this type. However, there is evidence that many Registered Social Landlords (providers of affordable or social housing) that have tended to continue to provide sheltered housing, albeit using different and much improved design principles that include typically larger (one, if not two, bedroom) units, often located in better locations and designed to higher standards.

2.1.5 Evidence suggests that increasingly, older people are putting off moving into sheltered housing until they are much older / frailer. Consequently, the housing provided for them needs to be suited to a wider range of needs.

2.1.6 There is an increasing trend away from resident wardens as a result mainly of a combination of minimum wage legislation and the working time directive. Schemes tend now to have a "professional" warden and an alarm service for out-of-hours. This alarm service can be quite sophisticated, and include movement sensors and intercom links between the householder and the service. Wardens are covering increasingly large geographic patches / numbers of schemes - often ranging between 40 and 80 people. They often do not visit on a daily basis, but will at least contact everyone by intercom daily. This clearly has an impact on the warden facilities that are required in each development.

2.1.7 The situation in the private sector is somewhat different. Sheltered housing remains very much the preserve of older people who are capable of "independent living". Housing tends to be of a good standard, and will be suited to people who are becoming less agile (so light switches, power sockets, etc tend to be designed to suit the less able). Again, there is a move away from resident wardens – where they do exist they tend to be called house managers, or other terms but decreasingly wardens. As a result many older complexes are now left with a warden flat that is no longer used for this purpose.

Extra Care Housing

- 2.1.8 In recent years changes have begun to take place in the provision of specialist housing for older people. Previously, choice in accommodation for older people typically meant one of three options:
- remaining in the family home (often increasingly difficult to maintain and increasingly inaccessible)
 - moving to sheltered housing (often perceived as an interim and public sector option)
 - or moving into some form of care home (often entailing a surrender of housing equity).
- 2.1.9 Over time however these options have evolved – both in terms of their popularity and nature. Two of the most important developments are: an increase in services to support people in their family home; and the development of specialist housing which has been designed to accommodate people with a range of lifestyle, health and care needs to the extent that deteriorating general health should no longer be the sole reason for moving home.
- 2.1.10 This second development is now often referred to as 'extra care' or 'very sheltered' housing and generally has all the features of sheltered housing, albeit with some important variances. In most purpose-built schemes residents are provided with a greater level of care and support through additional warden cover; care is provided within the sheltered accommodation; meals are available; and the housing is aimed at residents who are in need of a carer (extra support), allowing residents to live in their own flats or bungalows with a range of facilities and support designed to meet their needs.
- 2.1.11 Whilst there is not a universally agreed definition of “extra care”, many housing associations / RSLs and local authorities have their own definitions of eligibility and what kinds of support should be provided. Extra care is commonly seen as an alternative to institutional care, giving a choice to elderly frail or disabled people whose care needs might traditionally have been met by residential care.
- 2.1.12 In addition to general extra care housing, the London Borough of Sutton’s strategy for people with learning disabilities places great emphasis on the need to support people within the Borough to access housing and gain independence, including those who are currently placed in residential care homes both within and outside the Borough where this is appropriate. The Council therefore believe that improved access to a full range of extra care housing opportunities is therefore essential both to enable people with learning disabilities to assert their rights on an equal basis and to deliver more financially efficient support through a reduction in reliance on expensive residential care provision.

2.2 Design and service requirements and aspirations

Sheltered housing

- 2.2.1 The design of sheltered housing developments is based on the standards for general needs housing and as such it would be expected that any new housing would need to be built to the Lifetime Homes standard. However, as well as achieving Lifetime Homes standards, sheltered housing should also have the following additional features and facilities:
- Units are self-contained (living rooms, kitchens and bathrooms)

- Housing is at ground or first floor level, or in blocks over two storeys high served by at least one lift
- Handrails are usually provided on common access stairs and passages
- Bathroom doors are either sliding or opening outwards and fitted with locks which work from the outside. Bathroom floors usually have a non-slip finish and handrails are often fitted beside the WC and bath or shower
- Light switches are lowered and socket outlets are raised (at least 500mm above the floor)
- A professional warden service is often provided with an emergency alarm system to call help in an emergency
- A guest room for visiting family or friends
- A communal lounge
- A laundry with washing and drying facilities
- A repairs and maintenance service
- Support staff to assist with laundry, shopping, cleaning, meal preparation, etc.

Extra care housing

2.2.2 Extra care housing provides all the above facilities as sheltered housing, but in addition also aims to provide the following:

- A resident or visiting scheme manager
- Staff on site 24 hours a day
- A restaurant which provides at least one main meal a day
- Hair dressing salon
- Day centre and activity rooms
- Assisted bathrooms on site
- Care staff to help with personal care
- Social facilities open to the local community

2.2.3 The 'Design Principles for Extra Care' Factsheet (2008) produced by the Department of Health sets out key design principles and aims for an extra care sheltered housing scheme:

- To provide a 'home for life' – as far as practically possible
- To create an enabling environment
- To be domestic in style

- To create a building to be proud of
- To enable staff to run and manage the building efficiently and to meet the care and support needs of residents
- To allow individuals to find privacy, comfort, support and companionship
- To create a resource for the local community
- To provide a mix of tenures and a range of care needs (to respond to market changes)
- To achieve the required sustainable targets
- To provide for the various staff needs

2.2.4 The Factsheet also identifies design criteria for end users. This includes:

- Criteria for residents such as:
 - level floors with no steps and flush at junctions;
 - maximising natural lighting;
 - clear layouts and landmarks
- Criteria for staff such as:
 - Conveniently located ancillary accommodation
 - Comfortable and functional facilities
- Criteria for visitors such as:
 - Clear and welcoming entrance
 - Clear definition of public, private and communal space
 - Adequate visitor parking

2.2.5 In relation to the design concept and layout of extra care schemes the Factsheet gives guidance on a number of considerations:

- Communal facilities – schemes can either be designed with central facilities serving all residents or developed on the principle of 'clusters' of 8-10 flats with a shared lounge or dining room.
- Privacy – It recommends a balance between the various areas required for residents, staff and the wider community to create progressive privacy, with a clear distinction between private spaces and the different types of shared spaces. Layouts should keep the need for internal security to a minimum.
- Public visiting areas – the building should have a logical layout, with areas that could be visited by the public located next to the main reception/entrance.
- Circulation – circulation areas should be level, bright, clear and 'rational'. Corridor lengths and walking distances should be kept to a minimum and where necessary broken up with 'rest stop' seating bays.

- Acoustics – layouts should try to ensure that living rooms of adjoining flats are next to each other and bedrooms are next to each other.
- Site specific issues – spaces should be arranged to take maximum advantage of what the site can offer. The site layout should achieve useable external spaces and a logical link between site entrance / car parking and the building entrance.
- Flexibility – critical to avoid redundant buildings in the future and the need for residents to move. Likely that the expectations of future generations will continue to rise. This flexibility includes the ability to install smart technology, alter spaces and facilities, future demands for increased space.

Integrating sheltered and extra care housing (both)

- 2.2.6 Many of the design principles set out above for extra care housing should also be aspirational principles for sheltered housing too. Other principles which apply to both include those relating to sustainability and size.
- 2.2.7 Social sustainability through long term flexibility to ensure that dwellings can adapt to meet residents' changing needs over time is important. As, increasingly, is environmental sustainability.
- 2.2.8 Housing for older people has high energy demands due to the large amount of time residents spend in their homes and their susceptibility to feeling the cold. Therefore energy efficiency is particularly important. There are a number of ways that energy efficiency can be addressed: passive design (e.g. maximising daylight and solar gain); energy efficiency measures (e.g. insulation, efficient heating); low carbon or renewable technologies (e.g. combined heat and power systems).
- 2.2.9 Consideration needs to be given to the size of dwellings and number of bedrooms. The Department of Health Factsheet recommends a typical 1 bed flat to be 54 sqm and a 2 bed flat to be 68sqm.
- 2.2.10 A second bedroom can be a high priority for residents where they can afford it. This room can be used by a visitor, partner, carer or used as a study or dining room. According to the Housing Corporation's National Affordable Housing Programme Prospective (2008-11): *"We expect that homes within housing for older people projects will have three habitable rooms and any exceptions to this standard will need to be agreed by the Housing Corporation on the basis of a clearly defined case that makes specific reference to evidence of ongoing demand for smaller units."*
- 2.2.11 However there is a need to balance the likely future demand for increased space with current cost constraints and need. Where there is currently a high demand for accommodation and a shortage of supply, it is hard to justify building significant numbers of 2 bedroomed properties at the expense of what could be a greater number of 1 bed roomed units housed within the same development.

2.3 Identified need in the Borough

- 2.3.1 Appendix B sets out details of need nationally and locally within the borough as identified by the Council. Our brief has not been to review or question that identified need, but to accept it as the required need to be addressed and to appraise the ability of the refurbishment and redevelopment options to meet that need.
- 2.3.2 A summary of the issues that the need analysis has identified (which the options need to help address) is presented in the bullet points below:

- Provide more accommodation for vulnerable adults of all ages, including specialist provision where necessary, as an alternative to residential and nursing care.
- National and local statistics confirm that people are living longer and that there will be an increased demand for accommodation and care and support services for older people in the future. Estimates for the borough show a 6% rise in residents who will be 85 years and over by 2016. Thereafter there are further projected steep increases from 2015 to 2025 as 'baby boomers' reach 65 years of age.
- This also applies to older people with dementia
- Cheam and Nonsuch wards have the highest estimated number of residents over 65 years within the borough.
- The number of people with late onset dementia is estimated to increase within the borough from 2.5% in 2010 to 6.7% by 2015.
- The number of people with learning disabilities is increasing and leading to increasing numbers of people with learning disabilities surviving into old age. Access to mainstream housing as one of the five major issues to be addressed to enable people with learning disabilities to take their place as valued citizens who enjoy the same rights as the rest of the population.
- The Council's 2001/02 Best Value Review of Sheltered Housing identified that the Cheam Ward had the highest projected need for older peoples' accommodation and a clear need for supported housing for older persons in the area.
- The 2004/05 Health, Housing and Social Care Strategy for Older people highlighted the need for extra care housing and more accessible housing related support services for older people borough wide.
- The 2005 update of the borough Housing Needs Assessment identified that households with support needs were more likely to be living in unsuitable housing and that older people were in the highest need for affordable housing. It predicted that an additional 112 units of accommodation per annum were required to meet the needs of this group.
- The 2007 Mori poll of residents' preferences identifies 'affordable housing' as an emerging priority for the borough with one in five citing it (19%), up by four points since 2005.
- As a result of the Best Value Review, four sheltered schemes have been decommissioned with the (gross) loss of 107 units. The majority of the sites have been redeveloped for general needs housing leading to a (net) loss of 55 older persons units.

3 How existing scheme meets standards and needs

3.1 Introduction

3.1.1 A site visit to Elizabeth House was undertaken by the consultant team on 17th November 2008. That team included experts in regeneration and sheltered housing as well as an architectural specialist. The visit involved an external visual survey of the properties and external space within the scheme. Internal access was gained to communal areas and corridors as well as a number of properties (bedsit flats, warden flats, warden offices, guest bedrooms, shared bathrooms, bungalows, ground floor and upper floor maisonette flats) in order to gain an understanding of the condition, layout and structure of the units and their potential for refurbishment and remodelling.

3.1.2 The site visit also involved a visual survey of the surrounding area in order to understand the physical context within which the scheme is situated.

3.2 Service provision

3.2.1 Within the scheme, the services and facilities currently provided include a communal entrance, lounge, kitchen and laundry facilities and staff facilities office and vacant flat. There are sheltered housing staff on site from 9am to 5.15pm, with out of hours support being provided by a call centre and a mobile response team.

3.3 Design

3.3.1 To investigate whether the Elizabeth House scheme meets current design standards, we have assessed it against the key design drivers behind current guidance on Extra Care and Sheltered Housing (The 'Design Principles for Extra Care' Factsheet 2008 – Department of Health). Our findings are presented below.

To provide a 'home for life':

3.3.2 The existing accommodation is not capable of being seen to provide residents with a 'home for life'. This is primarily due to the access and mobility issues identified during our site visit and evident through access structures that fail to meet or adequately address current basic standards. Any severe loss of mobility is likely to result in a resident having to be moved to more suitable accommodation and the numerous changes of level within the buildings and access via steps and staircases are also a potential hazard.

To create an enabling environment:

3.3.3 Due to the limited communal facilities within the existing scheme and subsequent limited scope for group social interaction, it is questionable whether it can be described as an enabling environment.

To be domestic in style:

3.3.4 The existing scheme is largely domestic in scale although Elizabeth House is a considerable mass that is larger than that of the surrounding domestic buildings.

To create a building to be proud of:

3.3.5 As previously discussed, the existing main buildings have been designed to reflect the surrounding vernacular but offer very little Architectural merit. Internal environments are 'tired' and in need of improvement. The separate blocks of bungalows, flats and houses are very low in density and again, offer little Architectural merit beyond being typical examples of post war local authority housing. Overall, there is undoubtedly a great deal

of scope for this site and conservation area setting to be significantly enhanced by a well designed scheme of high Architectural quality.

To enable staff to run and manage the building efficiently and to meet the care and support needs of residents:

- 3.3.6 Staff facilities at Elizabeth House are very limited compared to current standards and could be drastically improved.

To allow individuals to find privacy, comfort, support and companionship:

- 3.3.7 It is clear that the existing residents of the Elizabeth House Scheme enjoy degrees of privacy (greatly helped by the location), comfort, support and companionship but it must be considered relatively within the limitations of the existing accommodation rather than comparable to a scheme built to today's standards. An example is the shared bathing and washing facilities in the Elizabeth House block which could not be provided under current standards and compromise resident privacy.

To create a resource for the local community:

- 3.3.8 At present the communal facilities are only available to residents of the scheme.

To provide a mix of tenures and a range of care needs (to respond to market changes):

- 3.3.9 The range of tenures and care needs that Elizabeth House is able to offer is limited by the existing building. This is likely to make the scheme inflexible and unable to respond to changes in the market and demand for different types of accommodation, particularly for those less mobile and more vulnerable.

To achieve the required sustainable targets:

- 3.3.10 Due to the age of the buildings, it is highly unlikely that this scheme would meet current building regulation standards or sustainable targets.

To provide for the various staff needs:

- 3.3.11 As discussed above, current staff facilities are no more than adequate and can be greatly improved.

3.4 Location

- 3.4.1 Location is of considerable importance in older people's housing and can mean the difference between a scheme and residents integrating and becoming part of a community, or remaining segregated and isolated. The Elizabeth House site is well located and meets many of the criteria for a good location identified in the Department of Health's Extra Care Housing Toolkit, including:

- Good links to retail and other facilities
- Good access to health services
- Links into the surrounding local community
- Easy access to local transport services
- Situated in a low crime and low risk neighbourhood

4 Option 1 Refurbishment

4.1 Introduction

4.1.1 This section examines how far refurbishment can address the problems and maximise the opportunities presented by the existing scheme in order to meet the identified aspirations and need.

4.1.2 In order to assist with analysis of this option a site visit was made by the consultant team to Griffiths House, a sheltered housing scheme built in 1972 which was refurbished by Sutton Housing Society in 2003 to convert the 41 bedsit scheme into 35 improved units (1 x 2 bed, 30 x 1bed, 4 x bedsits).

4.2 Potential refurbishment scheme

4.2.1 The existing scheme has many positives relating to the location and existing sense of community but the degree to which existing units can be adapted or refurbished to meet current standards is largely dependent on the type of accommodation, not its location.

4.2.2 Elizabeth House does lend itself to a programme of refurbishment where existing bedsits are capable of being knocked together to form larger one bedroom apartments. There is however limited scope to make the current building fully accessible due to the changes in level within the building. Even if a lift could be introduced to provide access to the first floor, there are still changes of level to negotiate within the access corridors to each floor.

4.2.3 The bedsit bungalows are more difficult to adapt due the nature of the structural form and load bearing walls that define the footprint of each unit. They are also configured in small or staggered blocks that limit the options to increase the size of individual units. The existing one bedroom flats are functional but again, would require significant structural alterations in order to make them fully accessible to mobility standards. Corridor widths and door openings are all below the required current standards.

4.2.4 It may be possible to introduce elements of new build into the scheme to either extend existing blocks or provide additional accommodation. This may help reduce the shortfall in units resulting from the creation of larger units but is likely to result in a visually unattractive and disjointed scheme from a design standpoint.

4.3 Unit numbers and types/mix

4.3.1 Assuming the majority of the 34 bedsits within Elizabeth House could be 'knocked together' (two units into one) it will be possible to create one bedroom apartments of approximately 50sqm.

4.3.2 The 17 bedsit bungalows are by nature very difficult to extend. The ideal scenario would be to knock three units into two where they both gain a separate bedroom. Unfortunately as they are configured in small or staggered blocks this does not appear to be possible. As such they may have to remain as existing with improvements to access where possible.

4.3.3 28 one bedroom flats can largely remain but perhaps create a number of 2 bed units (8 become 4) subject to demand. The 5 other dwellings would remain as existing with refurbishments and improved to mobility access where possible.

4.3.4 The indicative mix and numbers based on the above would be:

- 15no. one bed apartments

- 4no. 'studio' flats
- 17no. 'studio' bungalows
- 20no. one bed flats
- 4no. two bed flats
- 3no. houses and
- 2no. disabled persons bungalows

4.3.5 Total number units = 65 (loss of 17no. on existing)

4.3.6 Please note these figures are purely indicative and based on a theoretical remodelling of the existing accommodation.

4.3.7 The 21 studio dwellings would not meet modern day size standards and the long term future needs of the borough and residents not being of sufficient size to be occupied by couples [Note: Studio flats differ from existing bedsit flats in that they include full bathrooms, rather than just toilets and basins].

4.3.8 The refurbishment option is therefore limited in its ability to specifically provide current standard extra care / sheltered housing units throughout the development.

4.4 Provision of ancillary services and facilities

4.4.1 The following are the range of services and facilities identified by the Council as appropriate for this scheme:

- A resident or visiting scheme manager
- An alarm system which provides 24 hour emergency cover
- A guest room/s for visiting family or friends
- A communal lounge / activity room/s
- A laundry with washing and drying facilities
- A repairs and maintenance service
- Support staff to assist with laundry, shopping, cleaning, meal preparation, etc.
- Care staff on site 24 hours a day
- Restaurant facilities
- Assisted bathrooms on site
- Carer's office and overnight accommodation

4.4.2 Refurbishment of the existing scheme can probably accommodate all of these services, but possibly not always in the most appropriate locations. However, if all these facilities were accommodated as part of a refurbishment it would be likely to lead to a further loss

of residential unit numbers. Alternatively they could possibly be located within an appropriate new build extension to the existing building.

- 4.4.3 There is a question as to whether there would be enough units to support this level of facility and service provision within a refurbished scheme, particularly if the unit numbers had to drop further in order to accommodate all these facilities.

4.5 Accessibility

- 4.5.1 As discussed above, accessibility is a significant issue at Elizabeth House due to the nature of the site and existing buildings. It is clear that some improvements can be made to create level thresholds but the fundamental issues of stepped access to many of the units are difficult (and in some cases probably impossible) to address.

4.6 Sustainability

- 4.6.1 It is likely that the existing buildings will require considerable remedial works to improve the thermal performance and ventilation levels needed to comply with current building regulations, and increase energy efficiency performance and is likely to be a costly exercise. At this time, the condition and performance of the mechanical and electrical services is not known and would require a full condition survey to determine the level of works or replacement required.

- 4.6.2 In terms of social sustainability, whilst there is a degree of (albeit limited) flexibility to change the existing units to go towards meeting (but not fully achieve) current standards, flexibility to meet further future changing requirements and standards will be extremely limited. The ability to again change these remodelled units in the future will be seriously restricted by the existing built form. This means that the social sustainability of these units, once refurbished, is very limited.

- 4.6.3 The lifetime of a refurbished/remodelled scheme would be expected to be in the order of 30 years (The Housing Corporation Capital Funding Guide 2004).

4.7 Financial viability / Best Value

- 4.7.1 High level financial analysis of the refurbishment option was undertaken as part of this report. This analysis included a range of assumptions. Key assumptions included:

- A refurbishing/remodelling cost of £850 per sqm (based upon our experience of similar schemes elsewhere) which equates to a unit refurbishing/remodelling cost of £46,750 for a (55sqm) 1 bed flat and £51,000 for a (60 sqm) 2 bed flat.
- Rental income ranging from £72.43 per week for a studio flat to £100.45 per week for a 2 bed unit (based upon comparable rental levels elsewhere)
- £605,000 (20% of residential unit total build costs) for the creation/improvement of communal facilities

[Note: Existing survey work indicates the presence of asbestos in buildings within the scheme (in pipe insulation, floor tiles, soil stack pipe, service duct access and garage roofs), however the levels are not considered to be excessive for a building of this age and it is not felt that they would add significant costs to either the refurbishment/remodelling or the redevelopment options.]

- 4.7.2 The key findings of this analysis are:

- Overall refurbishment/remodelling costs of £4.7 million

- Annual rental income (net of losses, management and maintenance) of £188k
- Capital value of net rental income of £3.77 million (assuming 5% yield)
- The 30 year Net Present Value (NPV) of cashflows is -£1.65m. This equates to a 30 year NPV of -£25k per unit.

4.7.3 Sutton Housing Partnership, the Council's Arms Length Management Organisation (ALMO) which is responsible for the management and maintenance of the Elizabeth House scheme on behalf of the Council, is limited in its ability to undertake these works. Its business plan assumes spending of £24.5k per unit over the next 30 years on the Elizabeth house scheme on day to day repairs and maintenance, including bringing the properties up to the minimum decent homes standard. Also its ability to spend that funding is dependent upon the ALMO gaining 2 stars in its audit next October. It will not be able to spend until then.

4.7.4 It is therefore likely that refurbishment would have to be undertaken by a RSL, with the existing scheme potentially sold to them at a nominal value. The RSL would incur the refurbishment/remodelling costs and in return receive the future rental income. The ALMO business plan will assume a net future income stream from the scheme (rental income net of revenue and capital costs), so the sale of the units to an RSL will represent a cost to the ALMO.

4.7.5 Whilst the Housing Corporation has in the past funded some refurbishment/remodelling schemes within the Borough, others have tended to be self-funded. We understand from conversations with Registered Social Landlords that those that have been funded have often been fortunate to have come along in the right place at the right time. In our view it would be prudent to assume that no Housing Corporation grant funding would be available for refurbishment/remodelling of the Elizabeth House Scheme.

4.7.6 Our high level financial analysis suggests that refurbishment is financially viable (although heavy on cash flow) and likely to be attractive to a RSL. It is worth noting that a mixture of the current economic climate, the availability of finance and caution from RSLs regarding taking on additional loans, are all likely to impact on the viability of both refurbishment and redevelopment options.

4.7.7 Financial viability will depend to an extent on the proposed phasing of the works. Our analysis has assumed that refurbishment will take place in one continuous sequence. Ultimately, if the works are staggered over a long period rather than a continuous sequence then it will be less cost effective and best value will not be achieved.

4.8 Phasing/resident displacement

4.8.1 It is envisaged that a block by block rolling programme of refurbishment works would need to be carried out unless all of the residents could be rehoused at once. Rehousing everyone at once would of course require all the residents to be rehoused temporarily off-site. Given that the refurbishment would result in fewer replacement units, some of those residents (around 17) would remain permanently rehoused off-site. A rolling programme of block by block refurbishment would still require all residents to be rehoused, although it may be possible to do much of this within the site (probably depending on the level of units that can be kept vacant). Again though, even under a rolling programme around 17 residents would have to be rehoused off-site.

4.8.2 Under a rolling programme ideally the main block would be refurbished first and works to the communal facilities prioritised to ensure they are available at the earliest opportunity.

4.8.3 Assuming a rolling programme of block by block refurbishment, timescales may be in the order of 20 – 24 months. However assuming a site wide refurbishment programme it could potentially be achieved in 12 – 15months (post rehousing), but would require that all of the residents could be rehoused at once.

4.9 Impact on surrounding neighbourhood

4.9.1 Refurbishment will result in a net loss of unit numbers on the site. This net loss of around 17 units equates to a reduction of over 20% of the existing units. This is likely to have a negative impact – albeit relatively small – on the nearby shops and services.

4.9.2 The refurbishment option will also have a fairly neutral impact on the surrounding area, from a visual, planning and traffic/movement perspective. Refurbishment will afford some opportunity to improve the external appearance of the existing buildings, but fundamentally the layout and design of the buildings will remain the same as it will be constrained by the limitations of the existing built form.

5 Option 2 Redevelopment

5.1 Introduction

5.1.1 This section examines how far redevelopment can address the problems and maximise the opportunities presented by the existing scheme in order to meet the identified aspirations and need.

5.2 Potential redevelopment scheme

5.2.1 As discussed in the previous section, the Elizabeth House site is very well suited to the provision of Extra Care and Sheltered accommodation but does not currently fulfil its potential due to the low density, ageing buildings and below standard facilities.

5.2.2 The relationship of the site to the village could however be improved with increased permeability through the site although the design would need to ensure the privacy and security of the residents was not compromised.

5.2.3 The site roughly splits into three areas dictated by the existing boundaries and shape:

- The Southern area is currently occupied by Elizabeth House and is the most remote from the main access point, Mickleham Gardens, although this is where the existing main entrance to the scheme is located, accessed from the secondary access point on Park Lane. This area of the site is the obvious location for Extra Care accommodation and entrance positions to a new scheme could be repositioned to be located more centrally.
- The central area of the site has direct access from Mickleham Gardens and strong visual and physical links and connections to Cheam Park. This linkage is a significant opportunity that must be explored and maximised by any possible redevelopment option.
- The Northern area also has good access via Pond Hill Gardens and the advantage of a frontage onto Malden Road gives this part of the site the possibility of becoming the 'front door' to the development.

5.2.4 The form and design of a new scheme will be dependent upon the type, number and mix of accommodation provided. Extra Care accommodation by nature has a critical mass and requires a relatively large footprint in order to provide large numbers of residential units clustered around shared communal facilities with access to all throughout. Architecturally, it will be important to visually 'break up' this large form in order to respond to the context and enhance the conservation area.

5.2.5 The external areas and environments that would surround the new accommodation are of equal importance to the internal spaces. They can provide an extension of the community facilities and have a dramatic impact on the quality of the scheme and help to promote visual links and coherency between different aspects of the development. They can also provide outdoor activity and meeting spaces for residents and the community.

5.3 Unit numbers and types/mix

5.3.1 Part of the development is within a conservation area and at this stage the town planning constraints for the scheme have yet to be determined. In terms of this exercise we have been instructed to proceed on the basis that there is scope to build throughout the scheme to two storeys (with consideration to be given for the potential for three storey development in certain locations).

- 5.3.2 Based on the studies and sketch options produced to date, it is clear that the site is capable of sustaining a relatively large development of around 100 units, depending on the proposed mix and extent of the extra care facility.
- 5.3.3 As part of this exercise we have not undertaken detailed site planning layout investigations or entered discussions with the planning department. However, based upon high level analysis by our architect, if we assume an entirely 2 storey scheme comprising 80% 1 bed units of around 55sqm and 20% 2 bed units of around 65sqm then the target minimum number should be 100 units. If we assume a scheme of 2 and 3 storey blocks with the same 80/20 mix and unit sizes, then an uplift of at least 25% is realistic giving a 125 unit target. It is possible that with a higher density and reduced unit sizes, both these figures could be increased.
- 5.3.4 Our analysis of the site and site plans indicates that this level of redevelopment is more than feasible from a design and planning standpoint, particularly with the inclusion of the adjacent Council-owned properties at 1 and 2 Pond Hill Gardens, 1, 2 and 3 Cheam Park Way (including garages).

5.4 Provision of ancillary services and facilities

- 5.4.1 A redeveloped site will provide the opportunity to create a range of ancillary and communal facilities that offer the residents and community a greatly enhanced environment. These facilities would conform to the latest design guidance and space standards and could be designed in a way that would provide a new 'heart' to the scheme and wider community, if so desired.
- 5.4.2 The increased and enhanced staff facilities that could be provided through a comprehensive redevelopment would enable care to be given to residents with a wider variety of disabilities and mobility impairments and provide them with a 'home for life'.
- 5.4.3 Redevelopment offers the potential to provide all of the services that are required to support residents, providing obviously the scale of the development and the size of the site remain as per that set out at paragraphs 5.3.3 and 5.3.4. This could include the following range of services and facilities identified by the Council:
- A resident or visiting scheme manager
 - An alarm system which provides 24 hour emergency cover
 - A guest room/s for visiting family or friends
 - A communal lounge / activity room/s
 - A laundry with washing and drying facilities
 - A repairs and maintenance service
 - Support staff to assist with laundry, shopping, cleaning, meal preparation, etc.
 - Care staff on site 24 hours a day
 - Restaurant facilities
 - Assisted bathrooms on site

- Carer's office and overnight accommodation

5.5 Accessibility

- 5.5.1 It is likely the pedestrian and vehicle access points into the site would remain as existing with a possible relocation of the main building entrance.
- 5.5.2 The main challenge will be to overcome the existing site levels to ensure changes in level are accommodated externally and do not create internal restrictions as is the case at present. In our view this challenge can be addressed through design solutions such as building orientation, ramping and retaining walls.

5.6 Sustainability

- 5.6.1 A new development would be built at least to current building regulations standards and ideally to achieve accreditation from a recognised environmental assessment such as BREEAM (where credits are awarded for environmental impacts in number of areas and added together to produce an overall score, which results in the building being rated PASS, GOOD, VERY GOOD, EXCELLENT or OUTSTANDING and a certificate awarded to the development).
- 5.6.2 The roughly north south orientation of the site should provide opportunity for passive design features that maximise solar gain, daylighting and natural ventilation. High levels of insulation and high quality window specification will be required to achieve low u-values along with efficient, low energy lighting heating and ventilation systems. Low carbon and renewable energy systems should be considered subject to a site specific assessment of the most viable and appropriate technologies. If possible, any materials that can be recycled from the demolition of the existing buildings should be used within the redevelopment.
- 5.6.3 The utilisation of modern methods of construction and build styles enables a level of flexibility in new build that cannot be achieved in refurbishment. This social sustainability is particularly important in regard to the provision of homes for older people with changing requirements.
- 5.6.4 Modern methods of construction mean that new developments can include partition walls that are lightweight and not load bearing enabling them to be relocated to allow expansion and alteration. Also the location of flexible servicing solutions (with inbuilt flexibility relating to the location of risers) allows flexibility regarding the future mix and clustering of units within a development. This inherent flexibility in new build offers the potential to adapt people's homes relatively easy should the need for change arise (e.g. the need to incorporate additional WCs or carers rooms in certain locations).
- 5.6.5 Modern methods of construction also offer the opportunity to ensure future-proofing to support the installation of smart technology now and in the future.
- 5.6.6 The lifetime of a redeveloped new build scheme would be expected to be in the order of 60 years (The Housing Corporation Capital Funding Guide 2004).

5.7 Financial viability / Best Value

- 5.7.1 High level financial analysis of two redevelopment options – one providing replacement 100 units (assuming 2 storey) and another providing 125 units (assuming a 2 and 3 storey mix) – was undertaken as part of this report. This analysis included a range of assumptions. Key assumptions included:

- A redevelopment build cost of £1,450 per sqm (based upon our experience of similar schemes elsewhere) which equates to a unit redevelopment cost of £79,750 for a (55sqm) 1 bed flat and £94,250 for a (65sqm) 2 bed flat.
- Rental income ranging from £80.49 per week for a 1 bed flat to £91.53 per week for a 2 bed flat (based upon comparable rental levels elsewhere)
- £1.65 million to £2.07 million (20% of residential unit total build costs) for the creation/improvement of communal facilities, depending upon size of development.

5.7.2 The key findings of this analysis for the two options are:

Option 1a – 100 units

- Overall redevelopment costs of £12 million
- Social Housing Grant of £3m (£12.5k per person)
- Annual rental income (net of losses, management and maintenance) of £303k
- Capital value of net rental income of £6 million (assuming 5% yield)
- The 30 year NPV of cashflows is -£4.16m. This equates to a 30 year NPV of -£42k per unit.

Option 2a – 125 units

- Overall redevelopment costs of £15 million
- Social Housing Grant of £3.75m (£12.5k per person)
- Annual rental income (net of losses, management and maintenance) of £379k
- Capital value of net rental income of £7.6 million (assuming 5% yield)
- The 30 year NPV of cashflows is -£5.1m. This equates to a 30 year NPV of -£41k per unit.

Option 1b – 100 units

- Overall redevelopment costs of £12 million
- Social Housing Grant of £6m (£25k per person)
- Annual rental income (net of losses, management and maintenance) of £303k
- Capital value of net rental income of £6 million (assuming 5% yield)
- The 30 year NPV of cashflows is -£1.04m. This equates to a 30 year NPV of -£10k per unit.

Option 2b – 125 units

- Overall redevelopment costs of £15 million
- Social Housing Grant of £7.5m (£25k per person)

- Annual rental income (net of losses, management and maintenance) of £379k
- Capital value of net rental income of £7.6 million (assuming 5% yield)
- The 30 year NPV of cashflows is -£1.2m. This equates to a 30 year NPV of -£9.5k per unit.

5.7.3 It is likely that redevelopment would be delivered through the Council selling the Elizabeth House scheme to a developer/RSL potentially for a nominal value. The developer/RSL would then incur the redevelopment costs and in return receive the future rental income or capital sales value. As with refurbishment, the ALMO business plan will assume a net future income stream from the existing scheme (rental income net of revenue and capital costs), so the sale of the units to a developer/RSL will represent a cost to the ALMO.

5.7.4 Historically the Housing Corporation's priorities have been continually changing, but it has previously funded redevelopment schemes within the Borough, which have also involved re-provision of existing units with new improved units, as well as provision of additional new units. We understand from conversations with the Council that recently the redevelopment of a 24 unit scheme to provide a replacement 63 unit scheme received in the region of £5.5 million grant funding. With the creation in December 2008 of the new Homes and Communities Agency (HCA), taking over the role of the Housing Corporation, the agency which will now be responsible for this grant funding is in the early stages of its development. In order to enable us to undertake a high level analysis of potential financial viability, we have made assumptions about the level of grant that may be available.

5.7.5 Our analysis for Option 1a and Option 2a has been based upon the prudent assumption that HCA grant funding of £12,500 per person would be available for redevelopment of the Elizabeth House Scheme. This is based upon assumption that 50% of the average London rates would be available, as the new build scheme includes an element of re-provision as well as additional units. The average grant for London was £25,000 per person (based on 2006/08 programme), and therefore we have assumed £12,500 per person for the appraisal. For the purposes of this assumption we have assumed that 1 bedroom = 2 persons and 2 bedroom = 4 persons.

5.7.6 With this assumption, based upon our high level analysis, redevelopment may not be an attractive proposition to a RSL, and it may require consideration of an alternative scheme with a different tenure mix to cross-subsidise the scheme. Alternatively if the grant rate was raised to the standard level of £25,000 per unit (less grant per unit than that received on the scheme referred to in paragraph 5.7.4 above) – as in Option 1b and Option 2b – it would become a potentially attractive proposition to an RSL. It is worth noting that a mixture of the current economic climate, the availability of finance and caution from RSLs regarding taking on additional loans, are all likely to impact on the viability of both refurbishment and redevelopment options.

5.7.7 As with refurbishment, financial viability will depend to an extent on the proposed phasing of the works. Our analysis has assumed that redevelopment will take place in one continuous sequence. Ultimately, if the works are staggered over a long period or a number of phases rather than one continuous sequence then it will be less cost effective and best value will not be achieved.

5.7.8 The lifetime of a redeveloped new build scheme would be expected to be significantly longer than that of a refurbishment/remodelling (potentially 60 years as opposed to 30).

5.8 Phasing/resident displacement

5.8.1 It is envisaged that a sequential two phased development would be the most likely route of implementation, where the extra care facility and ancillary services are constructed first. Through this phased approach the rehousing of residents can be managed more easily. A

sequential two phased redevelopment would potentially enable Elizabeth House to be retained until the first phase has been completed – allowing around 34 residents to remain on site during the redevelopment, and then be rehoused within the site.

5.8.2 Given that redevelopment will re-provide more units than are currently in the scheme, it provides the potential to guarantee a tenancy of one of the replacement homes to all the existing residents.

5.8.3 Again, as with the refurbishment option, if all the residents could be rehoused at once, it is likely that the demolition and subsequent redevelopment would be more cost effective and be delivered in a significantly reduced timescale (this was the basis of the analysis in 5.7.2 above).

5.8.4 Assuming a vacant site and single phase of development the timescale for redevelopment (post rehousing) may be in the region of 12 months. However assuming a two phase development (extra care block and community facilities first followed by stand alone blocks) the timescale (post rehousing) may be around 18 months. The phasing timescales are estimates and are subject to a detailed sequential programme and the complexity of the proposals.

5.9 Impact on surrounding neighbourhood

5.9.1 The redevelopment of this site could have an extremely positive impact on the surrounding neighbourhood.

5.9.2 Although the existing scheme and its residents are undoubtedly very much part of the local community, the extent to which it feels physically linked is limited. A carefully designed scheme on this site could offer a true extension of the village with greater interaction through a use of high quality shared space. The opportunity exists through redevelopment to consider greater permeability of the site (without compromising security) to generate activity and enhance informal surveillance. This could have benefits for residents within the site and in the surrounding area, helping to improve access to the park and reducing feelings of isolation within the site.

5.9.3 There is an opportunity to greatly improve the visual amenity of the surrounding neighbourhood with a considered approach to a high quality piece of urban design with well articulated spaces and buildings. Redevelopment if undertaken appropriately offers the opportunity to provide a high quality well designed group of buildings and spaces that can complement and contribute to the adjoining Conservation Area. The Council's ownership of the site means that it can exercise additional controls to its planning powers to ensure the high quality of the development and its design.

5.9.4 In addition a new build scheme can potentially provide better overlooking of the park to increase feeling of safety and sociability in that space.

5.9.5 Redevelopment is likely to lead to an increase in unit numbers of between 18 and 43 (this equates to an increase of between 22% and 52%). This is likely to have a positive impact on the nearby shops and services, by increasing demand.

5.9.6 Redevelopment to provide additional units is likely to generate additional traffic and the need for additional parking. High level analysis indicates that the site is capable of accommodating the additional car parking required to serve those units. In terms of traffic, the likelihood is that the additional movement generated will not be significant given the type of households that will be occupying the units.

6 Conclusion and recommendation

6.1 Introduction

6.1.1 This section includes an overarching analysis of the two options set out in a table, together with a written summary of the report’s conclusions.

6.2 Analysis table

6.2.1 Identified in the table below is a summary of the outcome of our analysis. This identifies whether we feel that either the option of refurbishment or the option of redevelopment meets what we feel are the key requirements. We have indicated the degree to which we feel each option meets the requirement:

- Meets all
- Meets most
- Meets some
- Meets little or none.

Requirement	Does refurbishment meet this requirement?	Does redevelopment meet this requirement?
Increased older peoples provision within the borough	Meets little or none	Meets all
Improved older peoples provision to meet the needs of an ageing population	Meets some	Meets all
A mix of extra care and sheltered accommodation to meet the needs of its ageing population	Meets some	Meets all
A mix of accommodation sizes to meet changing demands	Meets some	Meets all
The need for DDA (Disability Discrimination Act 1995) compliance – with level/lift access throughout the scheme and easily accessible communal facilities	Meets little or none	Meets all
Up to date property standards, including each tenancy having separate bathrooms, bedrooms and kitchens	Meets some	Meets all
Maximising the life of properties	Meets some	Meets all
Making the best use of the available site	Meets some	Meets all

Requirement	Does refurbishment meet this requirement?	Does redevelopment meet this requirement?
Minimising temporary impact on existing residents	Meets some	Meets some
Maximising the opportunities to secure funding for the works	Meets little or none	Meets all
Positive impact of the completed works/dwellings on the environment and conservation area	Meets some	Meets all
Supporting council's core values	Meets some	Meets all
Existing residents to be guaranteed a tenancy of one of the refurbished or replacement homes	Meets most	Meets all
Social sustainability (flexibility)	Meets little or none	Meets all
Environmental sustainability (mainly energy efficiency)	Meets some	Meets all
Units are self-contained	Meets most	Meets all
Clear and welcoming entrance	Meets some	Meets all
Clear definition of public, private and communal space	Meets some	Meets all
Adequate visitor parking	Meets all	Meets all
Required ancillary services and facilities in appropriate locations	Meets some	Meets all
Conveniently located ancillary staff accommodation	Meets some	Meets all
Comfortable and functional staff facilities	Meets some	Meets all
Maximising natural lighting	Meets some	Meets all
Clear layouts and landmarks	Meets some	Meets all
Central or clustered communal facilities	Meets some	Meets all
Progressive privacy	Meets some	Meets all
Public visiting areas located next to the main reception/entrance	Meets some	Meets all
Circulation areas that are level, bright,	Meets some	Meets all

Requirement	Does refurbishment meet this requirement?	Does redevelopment meet this requirement?
clear and 'rational'.		
Acoustically beneficial layouts	Meets little or none	Meets most
Layout takes advantage of what the site can offer.	Meets some	Meets all
The site layout achieves useable external spaces	Meets most	Meets all
Logical link between site entrance / car parking and the building entrance.	Meets most	Meets all

6.2.2 In summary our analysis in the above table indicates that in nearly all instances redevelopment fully achieves the key requirements, which the Council is looking for from a regenerated housing scheme, whereas in most cases refurbishment will only partially achieve those same requirements.

6.3 Summary conclusions

6.3.1 In summary, redevelopment is the most appropriate means of delivering improved older people's housing on this site. It will provide housing that more effectively meets existing and future residents' needs, in terms of the homes it can provide as well as the associated facilities and support that it can accommodate. It will also provide homes that can be more flexible and responsive to future changes, and in particular the changing demands (as expectations of future generations for this type of housing will continue to rise) and needs (as people's requirement for support changes) of residents.

6.3.2 As well as providing units that are more 'fit for purpose' it can also provide a wider development which functions more effectively for its residents and visitors, is more attractive (both inside and out), makes better use of its location, is more energy efficient and sustainable, and fits in better with the surrounding area. Redevelopment if undertaken appropriately can offer the opportunity to provide a high quality well designed group of buildings and spaces that can complement and contribute significantly to the adjoining Conservation Area – an opportunity which would be much more limited with refurbishment.

6.3.3 Importantly as well, in an area with a significant level of need for this type of housing (and a shortfall in supply), redevelopment can provide additional numbers of homes.

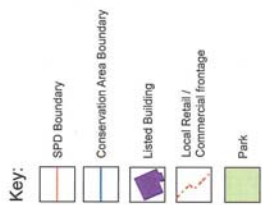
6.3.4 Refurbishment on the other hand is very limited in how far it can achieve the Council's requirements. It requires working with what is a relatively inflexible building (e.g. large numbers of supporting structural walls and changes in levels) to try to achieve homes that have often very specific requirements. In many cases that inflexibility means that these requirements cannot be fully (and often even partially) achieved.

6.3.5 This means that refurbishment will not be capable of providing fully sheltered and extra care housing and will result in a scheme that will only be suitable for a limited range of older people. This limited range will probably mean 'younger' older people and will exclude those with significant mobility, mental health or other significant care

requirements. There is a risk that it will then be designated for younger people at some future date.

- 6.3.6 High level analysis suggests that both options are potentially financially viable. The viability of redevelopment is more dependant upon grant funding, but this option is more likely to attract grant. However the lifetime of a redeveloped new build scheme would be expected to be significantly longer than that of a refurbishment/remodelling (potentially 60 years as opposed to 30).

Appendix A – Existing Site



Appendix B – Service Needs (Appendix to London Borough of Sutton Executive Report 7th July 2008)

1. Service Needs

- 1.1 National and local statistics confirm that people are living longer and that there will be an increased demand for accommodation and services for older people in the future. The latest demographic data (based on GLA 2006 projections) for the borough show a 6% rise in residents who will be 85 years and over by 2016. Thereafter there are further projected steep increases from 2015 to 2025 as 'baby boomers' reach 65 years of age.
- 1.2 A Population Needs Assessment of older people with dementia carried out by the London Centre for Dementia Care in December 2007 identified that the Cheam and Nonsuch wards have the highest estimated number of residents over 65 years within the borough. The same exercise identified the number of people with late onset dementia would increase within the borough from 2.5% in 2010 to 6.7% by 2015.
- 1.3 The population of people with a learning disability is increasing and leading to increasing numbers of people surviving into old age. This national demographic trend needs to be addressed through the provision of housing and support options. Valuing People Now, the refreshed national strategy for people with learning disabilities, cites access to mainstream housing as one of the five major issues to be addressed to enable people with learning disabilities to take their place as valued citizens who enjoy the same rights as the rest of the population.
- 1.4 The Council's 2001/02 Best Value Review of Sheltered Housing recommended a programme of strategic reviews of each sheltered housing scheme to review and improve the standard and use of the Council's available social rented housing for older people and enable older people to be supported and cared for within these settings for longer. The Elizabeth House review identified that it was no longer fit for purpose, that the Cheam Ward had the highest projected need for older peoples' accommodation and a clear need for supported housing for older persons in the area. In May 2003 the Social Care Services Performance Committee subsequently agreed "That further work be carried out to assess the potential of the site to provide new high quality accommodation for older people".
- 1.5 The 2004/05 Health, Housing and Social Care Strategy for Older people highlighted the need for extra care housing and more accessible housing related support services for older people borough wide. The 2005 update of the last borough Housing Needs Assessment identified that households with support needs were more likely to be living in unsuitable housing and that older people were in the highest need for affordable housing. It predicted that an additional 112 units of accommodation per annum were required to meet the needs of this group. The 2007 Mori poll of residents' preferences identifies 'affordable housing' as an emerging priority for the borough with one in five citing it (19%), up by four points since 2005.
- 1.6 As a result of the Best Value review six sheltered schemes have been decommissioned with the loss of 107 units. The majority of the sites have been redeveloped for general needs housing leading to a loss of 55 older persons units at a time when all of the projections identify a growing need for older person's accommodation.
- 1.7 The potential loss of a further 80 dwellings would have a significant negative long term impact on the Council's ability to meet the projected needs of older people and conflict with national and local projections of housing need. It will also be of particular concern to the western wards where there are more older people and very limited affordable housing.

- 1.8 Residential care is no longer an appropriate choice for the majority of older people. Extra care is now seen as the preferred choice when people require both housing and care and for whom it is not possible to remain in their own home.

Extra Care offers residents

Personalised services, choice and control, dignity, supporting relationships independence, tenure rights.

Extra Care Benefits to Local Authority

The availability of extra care significantly enhances the ability of the Council to support the independence of vulnerable adults and older people. This, in turn impacts positively on a number of the Council's performance indicators around 'supporting people' to live independently, and admission to residential care. There is also a financial incentive as it can be more cost effective to provide support to residents in extra care.

- 1.9 The Sutton strategy for people with learning disabilities places great emphasis on the need to support people within the Borough to access housing and gain independence, including those who are currently placed in residential care homes both within and outside the Borough where this is appropriate. Improved access to a full range of housing opportunities is therefore essential both to enable people to assert their rights on an equal basis and to deliver more financially efficient support through a reduction in reliance on expensive residential care provision.