SAXON WEALD

PROPERTY ADAPTATIONS POLICY

First approved: August 2005 **Author: Jessica Kelsey**

Last Revision: November 2026 **Next Review: November 2029**

1.0 Introduction and aim

1.1 Many of our customers may require adaptations or alterations to their homes in order to assist them with day-to-day living or to support their wellbeing. These can have a significant positive impact on an individual's quality of life, helping them maintain their independence or enabling them to remain in their home for longer.

1.2 The aim of this policy is to:

- Ensure the reasonable needs of disabled and/or elderly customers are prioritised and met accordingly, subject to the provision of available funding.
- Set out the criteria by which Saxon Weald will assess all requests.
- Clarify funding routes including statutory Disabled Facilities Grants.
- Balance the expectations of customers requiring adaptations with Saxon Weald's duty to manage its property portfolio effectively.
- Ensure compliance with legal and regulatory requirements and adopt best practice guidance where it is prudent to do so.

2.0 Definitions and scope

2.1 For the purposes of this policy, an 'adaptation' is a modification, alteration or addition to the physical fabric of a home to help restore or enable independent living, privacy, confidence or dignity for individuals and their families.

2.2 This policy applies to customers who live in social and affordable rent properties owned by Saxon Weald. Whilst we are not responsible for adaptations in leasehold properties, we will endeavour to make reasonable adjustments requested in any communal areas under the provisions of the Equalities Act 2010.

2.3 Adaptations are commonly divided into two categories, minor and major. 'Minor' adaptions are small adaptations up to a value of £1,000, such as lever taps, grab rails or window winders and can be undertaken without an occupational therapist recommendation. 'Major' adaptations usually involve changes to the fabric of the home such as widening doorways, installing a wet room or building an extension, as recommended by an occupational therapist.

2.4 The extent of the major adaptations will be determined through an occupational therapist assessment, and recommendations for necessary and appropriate adaptation works, which are made having regard to the specific circumstances of the individual.

2.5 Equipment, including 'telecare' (health monitors, activity sensors, etc.) is not included in our definition of adaptations. This is because such equipment is not related to the property, and there is a requirement for telecare systems to be used in conjunction with a relevant monitoring system and the customer's care plan, for which we are not responsible.

3.0 Legal and regulatory requirements and good practice

Legal and regulatory requirements

3.1 The Equality Act 2010[1] defines a disabled person as someone who has a physical or mental impairment that has a substantial and long-term adverse effect on their ability to carry out normal day-to-day activities. It sets out what can and cannot be considered a 'reasonable adjustment' for a disabled person and the obligation for reasonable consideration of a tenant's request to carry out improvements or alterations to remedy any substantial disadvantage they are placed under because of their disability.

3.2 The Home Standard within the regulatory framework requires registered providers to 'clearly communicate to tenant and relevant organisations on how they will assist tenants seeking adaptation services' and must 'cooperate with tenants…and other organisations so that a housing adaptation service is available to tenants where appropriate'.

3.3 The Housing Grants, Construction and Regeneration Act 1996 provides for Disabled Facilities Grants (DFG), administered by local authorities. These grants are used to fund major adaptations across tenures, although they are means-tested (customers may be required to contribute to the cost of the works subject to a test of financial resources).

Good practice guidance

3.4 'Meeting the home adaptation needs of older people' issued by Local Government Association 2020: https://www.local.gov.uk/publications/meeting-home-adaptation-needs-older-people

3.5 'Your rights to accessible and adaptable housing in England' issued by Equality and Human Rights Commission 2018: https://www.equalityhumanrights.com/sites/default/files/housing-and-disabled-people-your-rights-england.pdf

[1] Equality Act 2010 Section 36(1), Paragraph 2, Schedule 4, and Section 190

4.0 Policy

4.1 We will set an annual budget to fund and arrange minor adaptations costing up to £1,000, subject to available funding. Requests may be made by customers, staff or occupational therapists by contacting Saxon Weald through our main switchboard. We will consider each request individually, taking account of the customer's circumstances, how the adaptation would support day-to-day living or independence, and whether it is suitable for the property. An occupational therapist's recommendation is not normally required.

4.2 Where a major adaptation is required we will signpost and, where necessary, support the customer to make a referral to the occupational therapist (OT) at the relevant local authority for an assessment of need, and to apply for a Disabled Facilities Grant (DFG). Under the DFG scheme the local authority will be required to seek approval from us to undertake the works, which shall not be unreasonably withheld, subject to the criteria outlined in this policy.

4.3 We will consider top-up funding for major works up to £10,000 (ten thousand pounds) only where the local authority DFG threshold has been exceeded or the customer does not qualify for funding. We reserve the right to reject funding requests when we consider our resources are being disproportionately spent on a property or where the annual budget has been exhausted.

4.4 Where budgets have been exceeded support will be provided to seek alternative funding, if available, or works may be deferred to the next financial year.

4.5 We may choose to use the services of an independent occupational therapist to provide advice and guidance, or to speed up customer assessments where excessive waiting times pose a detrimental risk to customer wellbeing.

4.6 Exemptions to this policy will be considered on a case-by-case basis, subject to the approval by an Assistant Director or Head of Service.

Maintenance

4.7 We will maintain, repair, and service adaptations that have been installed through a DFG or funded by Saxon Weald.

4.8 Where adaptations are funded privately or by another source other than the above, we recommend customers take out a service agreement and/or breakdown cover, as they will be responsible for ongoing repairs and maintenance of these adaptations.

5.0 Permission for major adaptations

5.1 Requests for major adaptations will be considered when they are recommended by an occupational therapist. Customers can self-refer for an occupational therapist assessment through the relevant local authority, who

will arrange for an assessment and ensure that the correct referral is made to Saxon Weald, if appropriate.

5.2 We will not unreasonably refuse any requests This is in recognition of the positive impact they can have on the life of someone who is disabled, frail or has a life-limiting illness.

5.3 However, we also recognise that some major adaptations are not always appropriate in some properties; we will consider the individual circumstances of each case, but may have regard to the following:

- The characteristics of the building including age, location, internal layout, type of construction, surrounding buildings and ground condition, which limit the extent of works that are possible.
- Planning or Building Regulations constraints.
- The impact on communal areas, the property's future use or the ability to let the property in the future.
- The impact of the proposed adaptations on future maintenance costs or statutory compliance.
- Where there is more than one spare bedroom and we, or another registered provider of social housing, can offer you a home that will better meet your needs within a reasonable period of time.
- Where there has been a serious breach of tenancy resulting in a legal notice being served.

5.4 Where we refuse permission for a major adaptation, we will ensure that the reason for this is clearly communicated.

5.5 Where we are unable to reasonably adapt a property, we will work with the customer to understand their individual circumstances and discuss the options available. This may include exploring alternative accommodation where this could provide a more suitable long-term solution.

6.0 Privately funded adaptations

6.1 There maybe occasions where customers choose to self-fund adaptations, this could be for a number of reasons. For example, they do not meet the eligibility criteria for external funding, or there is a long wait for an assessment. Any requests should be made using the 'permission to alter your home form' (https://www.saxonweald.com/permissions/) and will be made in accordance with the relevant policy.

7.0 Adapted properties

7.1 Where properties that have had major adaptations become void, Saxon Weald will always, in the first instance, seek an applicant whose needs can be met by that particular property. This includes working with local authority partners to identify suitable applicants.

7.2 Where there are no applicants who meet the needs for the property, we may need to remove the adaptations in order to bring the property to the lettable standard.

8.0 Value for money

8.1 Adaptations bring significant social value in helping to promote independence and sustaining tenancies.

8.2 The aim of this policy is to ensure that budget is allocated to properties and tenants in a fair and consistent manner, to ensure value for money and the long-term sustainability of tenancies and our housing stock.

9.0 Monitoring and review

9.1 This policy will be reviewed at least every three years to ensure that it reflects the needs of our customers, good practice, and changes to legislation or regulation.

10.0 Equality and diversity

10.1 Saxon Weald is committed to ensuring that disabled people are not disadvantaged in accessing its services. We ensure that accessible information on accessing adaptations and DFGs is made available. We will ensure that information relating to this policy is easily accessible in the website and make a summary leaflet available to all staff and customers. In addition to this and where needed, we provide support or reasonable adjustments to customers to ensure fair and equal access for all customer groups.

10.2 Equality and diversity affect all aspects of our business and, as such, its principles are integral to everything we do. As a landlord and an employer, Saxon Weald aims to recognise and respond positively to people's differences, while providing equality of opportunity in relation to the services and careers we provide and support.

10.3 This means that no person or group of people, either working for Saxon Weald or seeking housing, services, employment or contracts from us, will be treated less favourably because of their or their partner's, family's, friend's or associated person's protected characteristics, which are: age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race and ethnicity, nationality, immigration status, religion or belief, gender and sexual orientation. This includes individuals either already serving on or applying to join our Board.

Version	Amendment	By	Date
2.0	Update	Steven Dennis	Aug-16
3.0	Complete re-write of policy to include more emphasis on disabled facilities grant and permission for approving DFG works.	Les Marjoram	Jan-19

Version	Amendment	By	Date
4.0	Three-year review with updates to reflect changes to legal and regulatory requirements and good practice.	Kath Hicks Executive Director – Customer Operations	Apr-22
5.0	Changes to define the criteria for approving adaptations requests and rewording to reflect changes in legal and regulatory requirements.	Jessica Kelsey Head of Asset & Sustainability	Aug-26