

Needs & Support Planning Policy

September 2025



Needs & Support Planning Policy	GEN023
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This policy should be read in conjunction with our:

[Equality, Diversity & Inclusion Policy](#)
Safeguarding Policy

1. Introduction

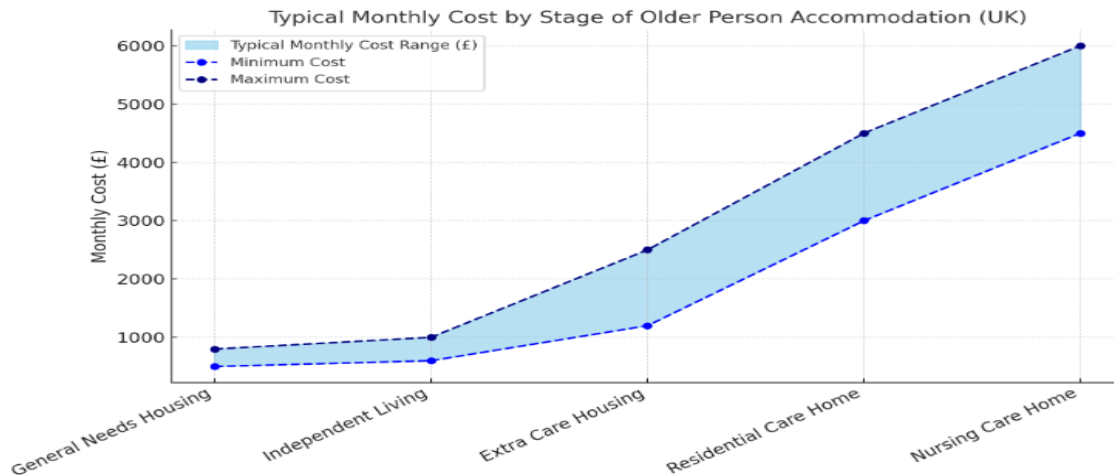
- 1.1 This policy explains how we assess residents' needs and plan support to help them live independently within our housing schemes.
- 1.2 By *independent living*, we mean living in self-contained, accessible homes with minimal support, where help is available if and when it's needed. This approach promotes safety, dignity, and personal choice.
- 1.3 This policy supports our mission to:

Provide comfortable, safe, and affordable homes for local people, deliver excellent services, and encourage residents to play an active role in their communities.

- 1.4 As needs change, some residents may no longer be able to live independently. Leaving their home can be distressing, disrupting familiar surroundings, friendships, and support networks, while also creating financial strain due to increased care and housing costs.
- 1.5 Effective needs and support planning helps residents stay independent for as long as possible, reducing the risk of crisis and supporting long-term wellbeing.

2. Stages of older persons' accommodation

- 2.1 Older people's housing typically follows a range of accommodation types, from the most to the least independent:
- 2.2 **General Needs Housing** – Ordinary homes where older people live without any specialist support.
- 2.3 **Independent Living** (*sometimes called sheltered housing*) – Self-contained homes with limited support, such as emergency alarm systems or a scheme manager. Promotes independence with reassurance.
- 2.4 **Extra Care Housing** – Independent flats with 24/7 on-site care and support. Suitable for those with greater care needs who still want to maintain their own home.
- 2.5 **Residential Care** – Communal living where personal care (e.g. washing, dressing, meals) is provided, but not medical care.
- 2.6 **Nursing Care** – Residential care that also includes qualified nurses on-site to provide medical support.
- 2.7 The following chart illustrates how the monthly costs increase as more care is needed; these charges are averages and can exceed the maximum shown.



3. Our stages of Needs Assessment

3.1 We are committed to understanding and meeting each resident's needs in a respectful, fair, and caring way. The following steps outline how we assess and respond to the needs of both prospective and current residents:

- **Nominations**

Most residents are referred through Homechoice (Choice-Based Lettings), where applicants actively express interest in available properties rather than being placed on a passive waiting list. The local council prioritises applicants based on criteria such as the risk of homelessness or under-occupation of larger social homes.

- **Initial Assessment**

When viewing properties, the Chief Executive and Scheme Managers assess whether prospective residents are likely to manage independent living, ensuring a good fit for both the individual and the scheme.

- **Data Recording**

Before moving in, we collect essential health information and emergency contact details. This information is securely held by the Association and Appello Careline, our emergency call monitoring provider.

- **Ongoing Reviews**

Residents' needs are reviewed regularly and documented in Support Plans. These help us track changes in health, wellbeing, and personal preferences over time.

- **Resident and Family Meetings**

When a resident's needs increase, we arrange a meeting with the resident and their family (where appropriate), together with the Chief Executive and Scheme Managers. The purpose of this meeting is to review the resident's support plan and to consider whether we remain the most suitable place for them to live.

4. Support Planning & Delivery

- 4.1 We are committed to delivering support that is caring, respectful, and tailored to individual needs. Our approach promotes independence while safeguarding the wellbeing, safety, and dignity of residents.
- 4.2 Where a refusal to engage with support planning poses a significant risk to the resident's wellbeing or impacts their ability to live independently, we may need to seek further input (e.g. from family, health or care services, or safeguarding professionals). While support planning is not mandatory, ongoing refusal, combined with increasing need, may affect our ability to continue offering a safe and appropriate housing setting for the resident. If a resident chooses not to engage in support planning, we will:
- Respect their right to make that choice
 - Explain the purpose and benefits of the plan
 - Record their refusal and any reasons they share
 - Carry out a basic risk assessment to ensure there are no immediate concerns
 - Continue to offer opportunities to engage in support planning in the future

5. Roles and Responsibilities

- **Scheme Managers**
Provide a trusted daily presence, offering personalised and respectful support. They are the first point of contact for residents and play a key role in monitoring wellbeing, responding to concerns, and coordinating access to services.
- **Appello Careline**
Our emergency call monitoring provider offers residents 24/7 access to urgent assistance, helping to ensure safety at all times.
- **Health and Social Care Links**
The Chief Executive and Scheme Managers maintain contact with local GPs, day centres, and Social Services, supporting a multi-agency approach to resident wellbeing in line with the Care Act 2014's emphasis on integrated care.

6. Our Services to Support Independent Living

- 6.1 The following services are provided as part of our commitment to enabling residents to live independently and confidently:
- **Resident Handbook**
All residents receive a welcome pack with clear and accessible information about their tenancy, rights, and the support services available to them.
 - **Support Plans**
Support Plans are a key tool used to help residents live safely and independently. All residents are asked to complete a Support Plan on moving

in. These plans are reviewed annually, or sooner if there are changes to health or personal circumstances. Plans are securely stored on the Association's housing management system and form part of our duty to assess and respond to individual needs in line with regulatory expectations.

- **Daily Welfare Calls (Weekdays)**
Scheme Managers carry out regular weekday check-ins. Absences due to hospital stays, holidays, or other reasons are logged, and the outcomes of visits are recorded as part of our safeguarding responsibilities.
- **Neighbourly Support**
Day-to-day practical support is provided by Scheme Managers, helping residents maintain independence while reducing the risk of social isolation.
- **Form Filling and Personal Advice**
Residents can receive help with completing forms or dealing with personal matters. This support is provided respectfully and confidentially by Scheme Managers or the Chief Executive.
- **Maintenance and Repairs**
Repairs are carried out by our in-house team with a focus on timeliness, safety, and clear communication.
- **Senior Access**
Where issues are more complex, or where care needs increase, the Chief Executive may become involved to support residents and their families. This can include arranging care reviews or discussing alternative housing or support options.
- **Resident Contact**
Residents are able to contact the office during our office hours, although we advise booking an appointment if possible. All calls are followed up promptly to ensure accountability and continuity of service.
- **Emergency Call Monitoring**
The performance of our emergency call provider (Appello Careline) is reviewed regularly to ensure it meets high standards of responsiveness and reliability. This system provides out of office hours support.
- **Quarterly Resident Meetings**
Held at each scheme and attended by employees and, when possible, Board Members. These meetings give residents a forum to raise concerns, offer feedback, and shape the delivery of services, supporting the principles of tenant involvement outlined by the Regulator of Social Housing.
- **One-to-One Visits**
Residents may request private meetings with Scheme Managers or the Chief Executive at any time to discuss their needs or concerns in confidence.

7. Right to be involved

7.1 As a resident-led provider, we believe residents should always have a say in matters that affect them.

7.2 Mental Capacity and Decision-Making

Capacity means a person's ability to make a specific decision at the time it needs to be made. Under the [Mental Capacity Act 2005](#), we must:

- Assume every person has capacity unless it is proven otherwise
- Support individuals to make their own decisions
- Recognise that making an unwise decision doesn't mean someone lacks capacity
- Act in a person's best interests if they are unable to decide
- Choose the least restrictive option to protect their rights and freedom

7.3 If someone is assessed as lacking capacity, any decisions made on their behalf must follow the principles of the Mental Capacity Act 2005 and be in their best interests.

8. Triggers for moving from Independent Living to Supported Care

8.1 There are no fixed criteria for when someone must move to more suitable accommodation. However, decisions are based on a combination of factors, including professional assessments and, where necessary, the Mental Capacity Act 2005 if the person lacks capacity. A move may be required when care needs become too high or complex for us to manage safely, placing the person at risk and creating unsustainable pressure on staff time and responsibilities.

- **Health or Mobility Decline:** Worsening physical conditions, frequent falls, or frailty that impact safety and independence.
- **Loss of Daily Living Skills**
Struggles with essential tasks like washing, dressing, or eating, even with support.
- **High or 24-Hour Care Needs**
Care needs exceed what home support can provide, especially overnight.
- **Cognitive Impairment**
Dementia or confusion causing safety risks (e.g. wandering, forgetting medication).
- **Breakdown of Support**
Carers can no longer provide help, or the person is socially isolated.
- **Safeguarding Concerns**
Signs of self-neglect, malnutrition, or repeated incidents that can't be managed at home.
- **Post-Hospital Discharge**
Hospital staff assess that returning home is unsafe.

9. Monitoring, review & alignment

9.1 This policy is reviewed every three years or earlier if regulations or business needs change. Residents, staff, and partners help shape the policy through regular feedback and performance monitoring.

9.2 The policy aligns with:

- The [Regulator of Social Housing's Consumer Standards](#), in particular the Tenancy Standard and Tenant Involvement and Empowerment Standard,

which emphasise the importance of appropriate housing and support services tailored to residents' needs.

- The [Care Act 2014](#), which places a duty on organisations to promote individual wellbeing, prevent or delay the development of care and support needs, and work in a joined-up way with health and social care partners.

10. Equity, Diversity & Inclusion (EDI)

10.1 We are committed to fair and inclusive support planning that recognises and respects the diverse needs of our residents. Our approach ensures that individual circumstances—such as age, disability, culture, or language—are taken into account when assessing and delivering support.

10.2 This policy impacts all residents receiving support, with particular significance for those from marginalised or underrepresented groups. The potential for unequal outcomes is high if we do not act inclusively, especially in supported housing for older people.

10.3 We monitor the effectiveness of our approach through resident feedback, employee input, and case reviews. Where we identify inequality or barriers, we make adjustments to ensure everyone receives support that is fair, person-centred, and accessible.