



*Bristol City Council Housing and Landlord Services*

# Home Adaptations Policy

Version 3

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## Definitions

Accessible Homes	The Council service responsible for assessing need and supporting the provision of housing adaptations, equipment and Technology Enabled Care to help people live safely and independently at home.
Adaptations	Changes made to a home to reduce physical barriers and support a person’s safety, independence and ability to carry out everyday activities.
Adult Social Care	Council services that support adults with care and support needs, including assessment, advice, and the provision or coordination of support to promote wellbeing and independence.
Care Direct	The Council’s first point of contact for adult social care services, including referrals and requests for assessments relating to housing adaptations, equipment and Technology Enabled Care.
Council Tenant	A person who occupies a home owned and managed by the Council under a secure or introductory tenancy agreement.
Disabled Facilities Grant (DFG)	A statutory grant available to help fund necessary and appropriate adaptations to the homes of Disabled people, subject to eligibility criteria and, in some cases, a means test.

Housing Revenue Account (HRA)	The ring-fenced account used by the Council to manage income and expenditure relating to council-owned housing, including the funding of adaptations for council tenants.
Occupational Therapy (OT)	A health and social care profession that assesses how a person's health or disability affects their ability to carry out daily activities and recommends equipment, adaptations or other solutions to support independence.
Private Tenant	A person who rents their home from a private landlord rather than the Council or a housing association.
Reasonable and Practicable	A check used in Disabled Facilities Grants to decide if the proposed work can realistically be done in the home, is safe, meets the person's needs, and offers a sensible use of public money given the property's layout and condition.
Rehousing	Support to move from a current home to alternative accommodation that is more suitable to meet a person's needs.
Regulator of Social Housing	The body responsible for regulating social housing providers in England, setting consumer standards and ensuring landlords meet requirements relating to safety, quality and accountability.
Technology Enabled Care (TEC)	The use of technology, such as alarms, sensors or monitoring systems, to support safety, independence and wellbeing at home.
Value for Money	The effective and efficient use of public resources to achieve the best possible outcomes, balancing cost with quality, sustainability and benefit.

## 1. Purpose

The purpose of this policy is to set out Bristol City Council's (BCC) approach to supporting residents to live safely, independently, and with dignity by addressing physical barriers within the home through housing adaptations, equipment, and technology-enabled care.

Many homes present environmental barriers such as stepped access, inaccessible bathing facilities, or internal layouts that restrict daily living, increase the risk of falls or injury, and impact health, wellbeing, and independence. Through this policy, the Council seeks to reduce those barriers and enable residents to carry out essential daily activities, including accessing their home, washing, cooking, moving safely within the property, and providing or receiving care.

Where adaptation of the existing home is not suitable or sustainable, the policy also supports the consideration of alternative housing options and advice on moving to a more appropriate property. The policy establishes clear principles for decision-making, investment, and governance to ensure that adaptations are delivered fairly, consistently, and proportionately, and that resources are used to maximise independence, safety, and benefit for residents.

## 2. Scope

This policy covers the assessment and delivery of housing adaptations, equipment, and technology-enabled care for residents of all ages including young people moving from Children's to Adult services, where eligible needs have been identified.

Support under this policy may apply to:

- People who are owner occupiers
- Private rented tenants
- Housing association tenants
- Council tenants living in homes owned and managed by Bristol City Council

There are two main funding streams for adaptations in Bristol:

1. **Disabled Facilities Grant (DFG)** – the statutory funding route for major adaptations for:
  - homeowners
  - private tenants
  - housing association tenants
2. **Housing Revenue Account (HRA) funding** – used for adaptations in council-owned homes.

The key differences are:

DFG is governed by legislation (Housing Grants, Construction and Regeneration Act 1996), may include a means test, and is subject to the statutory grant limit.

HRA adaptations for council tenants are funded as part of the Council's responsibilities as a landlord. These adaptations are not means tested. When agreeing adaptations, the Council must also consider how changes affect the long-term use of council homes and make sure public funding is used in the most effective way, while still meeting the tenant's identified needs.

These two routes operate under a single policy framework to ensure fairness, consistency, and transparency for all residents. While the funding routes and decision-making rules differ depending on the type of housing, every case is looked at individually following a professional assessment.

Support is agreed where a professional assessment identifies an eligible need, and where the adaptation is a reasonable and appropriate way of meeting that need. This means the Council will consider the resident's circumstances, the suitability of the home, and whether the solution is sustainable, rather than agreeing to a specific adaptation simply because it has been requested.

### **3. Aims and objectives**

A suitable, well-adapted home can be critical in enabling people to live well. The aim of this policy is to support residents to live independently, safely, and with dignity in their own homes for as long as possible, while ensuring that housing adaptations are delivered in a fair and consistent way.

The objectives of this policy are to:

- Support independence by enabling residents to carry out daily activities safely within their home.
- Improve safety and reduce the risk of falls, injury, or harm.
- Help prevent avoidable hospital admissions or the need for residential care.
- Support timely hospital discharge and effective reablement following illness or injury.
- Improve overall wellbeing, confidence, and quality of life.

Our aim is to make sure people get the adaptations they need to stay safe and independent at home, with a clear and consistent approach to how decisions are made.

### **4. Roles and Responsibilities and Authority**

The Director of Housing and Landlord Services and relevant Heads of Service (Private Housing & Accessible Homes, Housing Management & Estates, Repairs and Maintenance) are responsible for the implementation of this policy within their areas of responsibility, where they are involved.

All staff involved in the assessment, decision-making or delivery of housing adaptations, equipment or Technology Enabled Care services have a responsibility to apply this policy consistently.

Roles and responsibilities relevant to this policy are detailed in [Appendix A](#).

### **5. The Policy**

#### **5.1 Legal Context and Consumer Standards**

Housing adaptations are delivered within a legal and regulatory framework that includes duties to assess and meet eligible needs, ensure homes are safe and suitable, and use public funds responsibly. Key legislation includes the Care Act 2014, which requires local authorities to promote wellbeing and independence, and

the Housing Grants, Construction and Regeneration Act 1996, which sets the statutory framework for Disabled Facilities Grants (DFGs).

As set out in Section 2, DFGs and HRA-funded adaptations operate under different legislative frameworks. DFGs must meet specific statutory tests, while HRA-funded adaptations for council tenants are delivered under the Council's landlord responsibilities. These differences relate only to the legal basis and funding route; all residents are assessed using the same needs-based approach.

This policy aligns with the Social Housing (Regulation) Act 2023 and the Consumer Standards set by the Regulator of Social Housing. It supports compliance with the Safety and Quality Standard by ensuring council homes are safe and suitable, and with the Transparency, Influence and Accountability Standard by promoting fair and consistent decision-making.

## **5.2 Residents Rights**

For the purposes of this policy, the term "resident" refers to any individual who accesses or seeks to access housing adaptations, equipment or Technology Enabled Care (TEC) from the Council, regardless of housing tenure. This includes homeowners, private tenants, housing association tenants, council tenants and others eligible for assessment under the relevant legislation.

The Council is committed to treating all residents fairly, respectfully and consistently throughout the home adaptations process. Residents should be able to understand what support is available, how decisions are made, and what rights they have at each stage.

Residents have the right to request an assessment where they believe equipment, Technology Enabled Care or housing adaptations may be needed to support their safety, independence or wellbeing. The Council has a legal duty to consider such requests and to determine needs in accordance with the relevant legislation. This includes duties under adult social care legislation for equipment and TEC, and housing legislation for adaptations.

Residents will be involved in discussions about their needs, preferences and desired outcomes, and will be provided with clear and accessible information about the assessment process, potential options, eligibility, timescales and funding considerations.

The Council will have due regard to its responsibilities under the Equality Act 2010 and will provide reasonable adjustments where required, including accessible communication formats and non-digital routes for contact and engagement.

## 5.3 Types of Support

### 5.3.1 Eligibility

Eligibility for assessment and support varies because different parts of the home adaptations process operate under separate legislative frameworks.

However, the Council applies consistent assessment principles across all tenures, and decisions about equipment and adaptations are based on assessed need rather than housing tenure, although the way support is delivered may differ.

For further information on the legislative frameworks that govern housing adaptations and the support the Council provides, see [Appendix B](#).

### 5.3.2 Minor Adaptations

Minor adaptations are products and fittings that help someone to live in their home. These adaptations typically cost less than £1500 and can include the following:

- Chair/sofa/bed raisers
- Stair rails
- External handrails
- Shower seats
- Grab rails
- Drop down rails
- Key safes
- Lever taps
- Additional electrical sockets for medical equipment
- Concrete half steps
- Concrete platforms
- Concrete ramping
- Modular ramping

These adaptations are considered to determine whether they can meet a person's needs safely and support independent living, before more extensive works are explored.

### 5.3.3 Major Adaptations

Major adaptations are significant changes to the structure or layout of a home to enable a disabled person to live safely and independently. These are considered where needs cannot be met through equipment, Technology Enabled Care or minor adaptations alone.

All major adaptations must be supported by an Occupational Therapy assessment and will only be progressed where the works are assessed as necessary and appropriate to meet the disabled person's needs.

Major adaptations may include, but are not limited to:

- Level-access showers and major bathroom alterations
- Stairlifts and through-floor lifts
- Structural alterations to improve access within the home
- Door widening and circulation space to support wheelchair use
- Kitchen adaptations to enable safe and independent use
- Ramps and other permanent access solutions

The exact form of any major adaptation will be determined following assessment and technical survey work, with the resident involved in discussions about the proposed solution.

### **5.3.4 Tech-Enabled Care (TEC)**

The Home TEC Hub provides technology-enabled care for adults who are eligible and have been referred through adult social care. TEC may be used to prevent hospital admission, support timely discharge from hospital, or as an alternative or complement to traditional care and support.

Technology Enabled Care may include:

- Personal alarms to enable a person to call for help, for example following a fall
- Technology to support daily living, such as prompts or reminders
- Sensors to support people living with dementia, including safety and wellbeing alerts
- Systems that enable carers or support workers to monitor or maintain contact remotely

TEC is considered alongside equipment and adaptations as part of the overall assessment and may be offered as a standalone solution or in combination with other measures where this best meets the resident's needs.

## **5.4 Assessment and Decision Making**

Decisions about adaptations will always be based primarily on the individual circumstances, assessed needs, and desired outcomes of the resident. Each case will be considered on its own merits, and professional judgement will be used to identify the most appropriate way of meeting those needs.

For all residents, decisions will take into account:

- the person's assessed needs and goals
- what type of adaptation would meet those needs safely
- the suitability of the proposed adaptation now and in the future

Decisions will also take account of relevant building safety considerations, and adaptations will be designed and delivered in a way that does not compromise the safety or condition of the property.

For Disabled Facilities Grants (DFGs), the Council must also apply the statutory tests set out in the Housing Grants, Construction and Regeneration Act 1996.

These factors are balanced together, and no single factor will determine the outcome.

Where the resident lives in a council-owned property, the Council also has duties as a landlord. In these cases, additional considerations apply, including:

- Value for money in the use of Housing Revenue Account (HRA) funds.
- The long-term suitability and sustainability of the adaptation.
- The effective use of the wider housing stock.
- Implications for future lettings.

These landlord considerations do not override the individual's assessed needs but are weighed alongside them to determine whether an adaptation or an alternative housing option such as rehousing provides a more suitable solution.

### **5.4.1 Priority Cases**

At times of high demand, waiting times for assessment may be longer. The Council prioritises assessments based on risk to ensure those with the most urgent needs are supported first.

Priority will normally be given to people assessed as being at high risk. This may include, but is not limited to, individuals who:

- Have a limited life expectancy (for example, up to one year)
- Have experienced a recent and rapid deterioration in their health or functional ability
- Are experiencing a breakdown of care, or where carers are unable to continue
- Are at high and immediate risk of injury to themselves or their carer
- Are unable to be discharged from hospital without adaptations or alterations to their home

All residents retain the right to request an assessment. Where a case is not deemed to be priority, it may be completed later within the overall workflow, but the assessment will still determine the resident's needs and any support that may be appropriate. Risk levels may be reviewed if a person's circumstances change.

## **5.5. Move on and Rehousing Options**

### **5.5.1 Moving Versus Adapting the Home**

In some situations, adapting the existing home may not be the most effective way of meeting a resident's needs. Each case will be considered individually following a professional assessment.

Where appropriate, this may include consideration of whether moving to a more suitable home could better support independence, safety, or long-term suitability. For council tenants, rehousing options may be explored as part of this process. For other residents, the Council may discuss alternative housing options with them, recognising that finding and securing a move would be the resident's responsibility. Moving may be the better option if:

- The home is too big.
- It is overcrowded.
- Adaptations are not feasible given the age, condition or nature of the home.
- The home needs major structural changes or an extension, especially if the cost will go over the upper limit for a Disabled Facilities Grant (currently £30,000).
- The person cannot access a significant portion of the living space.
- It is above the ground floor with no lift and it is not possible to install one at a reasonable cost.
- The home is unable to meet long term care needs that might be better provided in ground floor accommodation, a sheltered home or extra care housing.

These are general considerations only and are not a prescriptive checklist. Any decision about moving versus adapting will be based on an individual assessment of need, the suitability of the property and the options available to the resident.

### **5.5.2 Homeowners, Private Tenants and Housing Association Tenants**

For homeowners, private tenants and housing association tenants, the Council will consider whether assessed needs can be met through adaptation of the existing home.

Where adaptation of the existing home is supported, assistance will be provided through the appropriate funding route, including the Disabled Facilities Grant or other available assistance. Where adaptation is not possible to meet the resident's needs, the Council will provide advice and information to help individuals consider alternative housing options, including the potential benefits of moving to a more suitable home.

### **5.5.3 Council Tenants**

For council tenants, the adaptation process includes secondary considerations that reflect the Council's role as a landlord. Once the resident's needs have been assessed (as outlined in Section 5.4), the Council must also consider how the proposed works interact with wider housing management responsibilities.

This stage focuses on understanding whether adapting the current home is the most effective and sustainable solution within the council housing stock. This may involve:

- Checking whether the property can realistically accommodate the adaptation.
- Identifying whether another council home is already better suited to the tenant's needs.
- Considering long-term asset implications, such as future lettable or significant structural alterations.
- Deciding whether the adaptation aligns with the Council's approach to managing and allocating adapted homes.

This is not a second needs assessment and does not override the Council's duties to meet the resident's assessed needs. It focuses on determining whether the current home is the most suitable property to adapt, or whether an alternative council home would provide a better long-term solution.

Where a move could offer a better or more sustainable outcome, the tenant will be supported to explore suitable options. Where a move is not viable, or where adapting the existing property remains the most appropriate solution, major adaptations may proceed.

### **5.5.4 Support with Moving**

The Council may be able to provide some support with the costs of moving to more suitable accommodation when discretionary funding is available as set out in our [Financial Assistance Policy](#).

There is also support for council tenants with the process of registering and bidding for alternative properties on the Home Choice system.

## **5.6 Disabled Facilities Grant**

Disabled Facilities Grants (DFGs) are available to disabled people in all housing tenures and are the main source of funding for major home adaptations for homeowners, private tenants and housing association residents. In practice, the Council normally funds adaptations for council tenants through the Housing Revenue Account rather than the Disabled Facilities Grant.

While the funding routes differ, the types of adaptations provided and the assessment process are broadly similar. Adaptations funded through the Housing Revenue Account for council tenants are not subject to a means test.

The most common requests relate to washing and bathing needs. Adaptations funded through the Disabled Facilities Grant or the Housing Revenue Account may include:

- Stairlifts and through-floor lifts
- Ramps, handrails and step lifts
- Door widening to improve wheelchair access
- Kitchen adaptations to support wheelchair use
- Level-access showers and other bathroom alterations, such as raised toilets
- Adaptations to provide access to parts of the garden
- Other works to reduce risks and improve safety within the home

Most adaptations funded through the Disabled Facilities Grant cost under £10,000. The maximum mandatory grant available is currently £30,000. Where the cost of necessary works exceeds this limit, additional funding may be considered from other sources, subject to eligibility, feasibility and available resources.

## **5.6.1 Eligibility**

An individual will be considered eligible for assistance if:

- The property is within Bristol City Council's boundary.
- They provide proof of property ownership and consent from any joint owner, or proof that they are a tenant of the council, housing association or private landlord
- They, or someone in their household, has a disability.
- They intend to live in the property during the grant period (usually 5 years but this can be shorter, for example, if the person is terminally ill).

Additionally, the Council must be satisfied that the proposed works are necessary and appropriate to meet the disabled person's needs, and that it is reasonable and practicable to carry them out, taking account of the age and condition of the property.

## **5.6.2 Other Considerations**

Assistance may not be appropriate where adaptations would not be suitable for the circumstances. This may include situations where:

- The resident does not intend to occupy the property as their main home for the required period, or where a move is imminent.

For council tenants, this may also include:

- The resident is in the Right to Buy process, and further checks are required to confirm the adaptation is still suitable and lawful to proceed.
- There is a significant risk that the tenancy will not continue, for example due to ongoing enforcement action.

In such cases, the Council will consider the individual circumstances of the household and may explore alternative options, such as temporary measures, Technology Enabled Care, or support to move to more suitable accommodation.

### **5.6.3 Test of Resources**

A test of resources (means test) is used to determine whether an applicant is required to contribute towards the cost of adaptations funded through the Disabled Facilities Grant, in line with national legislation and guidance.

There is no test of resources for families with disabled children and young people under the age of 18. However, applicants will still be required to complete relevant application forms so that the Council has up-to-date household and contact information.

Applicants who receive certain income-related benefits are not required to complete the full test of resources, although some financial information may still be requested to confirm eligibility.

For other adults aged 18 and over, a test of resources normally applies. This considers income, savings and other capital to determine whether a financial contribution is required and the amount of grant that may be awarded. The assessment is carried out in accordance with national regulations.

### **5.6.4 Managing Grants and Applications**

To help manage Disabled Facilities Grant (DFG) resources lawfully and transparently, the Council will:

- Issue a written decision approving or refusing a valid DFG application as soon as reasonably practicable and no later than six months from the date of the valid application.
- Where necessary, postpone payment of an approved grant (or part of it); however, if the works are complete, payment cannot be delayed for more than 12 months from the date of the valid application, and the applicant will be informed of any postponement.
- Advise applicants not to start eligible works before grant approval, because grant assistance generally cannot be paid for works already started or completed before approval, except where the authority has expressly agreed otherwise. (This protects applicants from ineligible spend and helps ensure

the works align with the approved specification and procurement requirements).

- Make grant payments on completion of the works, or by staged payments on larger schemes, with the final balance paid after satisfactory completion; no more than 90% of the grant will be paid before completion.

## **5.6.5 Repayment of the Grant**

For homeowners only, where a Disabled Facilities Grant exceeds £5,000, the Council will register a local land charge. If the property is sold within ten years of the works being completed, the Council usually require repayment of some or all of the grant, up to a maximum of £10,000, even where the grant awarded was higher.

## **5.7 Additional Sources of Funding**

### **5.7.1 Discretionary Adaptation Assistance**

In addition to statutory Disabled Facilities Grants, the Council may provide Discretionary Adaptation Assistance under its housing assistance powers, as detailed in the Financial Assistance Policy. This assistance may be used where a Disabled Facilities Grant is not available, is insufficient to meet the cost of necessary works, or where the required works fall outside the scope of DFG legislation.

This can include, for example, urgent or time-critical adaptations, repairs or cleaning and clearing to support safe hospital discharge, works required for people with terminal illness, repairs to existing adaptations, or cases where personal circumstances or housing tenure mean a valid DFG application cannot be made.

Discretionary Adaptation Assistance is considered on a case-by-case basis, subject to an appropriate referral or assessment and a financial assessment where applicable, including a savings threshold. The amount and type of assistance offered will depend on individual circumstances, the nature of the works required and available resources, and does not create an automatic entitlement.

### **5.7.2 Loans**

Sometimes a grant won't cover the full cost of the work. This may happen if the total cost exceeds the grant limit or if the applicant has a means-tested contribution to pay. In these situations, a loan may help meet the remaining amount.

Loan support can be considered for homeowners and private landlords with sufficient equity in their property. Loans are administered on behalf of the Council by Lendology CIC, who undertake a financial assessment and discuss suitable and affordable loan options with the applicant.

Funds from a loan are only released once work has started on site, and payment will be made to the applicant or their chosen representative.

## 5.8 Decisions

Decisions about eligibility, need and the scope of possible adaptations are made by the relevant assessing officers (e.g. Occupational Therapists and Technical Officers) in line with this policy and associated legislation. These decisions relate to the type of adaptation required and do not represent financial authorisation.

Financial approval to commit Council expenditure for HRA-funded adaptations follows the Council's Finance Scheme of Delegation. The thresholds below therefore apply only to authorisation of HRA spend, not to the clinical or technical decision that an adaptation is required. These thresholds do not apply to Disabled Facilities Grants (DFGs), which follow their own statutory decision-making and funding arrangements.

<b>Financial Threshold</b>	<b>Level of Authorisation</b>
Minor Adaptation – less than £1500	Officer
Major Adaptation – between £1500 - £25,000	Service Manager
Major Adaptation - £25,000 – £100,000	Head of Service
Major Adaptation - £100,000+	Director

These financial sign-off levels are just about who approves the spending. They do not affect anyone's legal right to an adaptation, and the Council will not refuse an adaptation solely on the grounds of cost without consideration of all relevant factors as set out in this policy.

## 5.9 Completed Adaptations

Once adaptation works have been completed, it is important that there is clarity about who is responsible for the adaptation, how it should be used and maintained, and what happens if circumstances change. Responsibilities differ depending on how the adaptation has been funded and delivered.

### 5.9.1 Disabled Facilities Grant (DFG) Adaptations

Where adaptations are completed through a Disabled Facilities Grant (DFG), the Council will confirm that:

- the works meet the assessed and identified need,
- the works have been completed to a satisfactory standard, and
- all required completion documentation has been provided in accordance with the grant approval letter.

Once completed, DFG-funded adaptations form part of the property and are the responsibility of the property owner. The Council is not responsible for ongoing repair, maintenance or replacement of adaptations provided through a DFG.

Product information, warranties and servicing details are usually provided directly by the contractor carrying out the work. Residents and property owners are responsible for retaining this documentation for future reference.

### **5.9.2 HRA-Funded Adaptations**

Where adaptations are delivered in council-owned homes using Housing Revenue Account (HRA) funding, the Council is responsible for arranging the works and will provide the resident with information about the safe use, maintenance and any servicing requirements of the installation.

As the landlord, the Council is responsible for repairing and maintaining permanent structural adaptations forming part of the property, in line with its Repairs and Maintenance Policy. This does not include personal equipment that is issued separately through adult social care or Technology Enabled Care.

Where a council-owned property becomes empty, the Council will consider whether adaptations should be retained, removed or modified before reletting. Decisions will be made in line with the Making Best Use of Stock (MBUS) Policy, taking account of housing demand, safety, value for money and the effective use of adapted housing stock.

### **5.9.3 Adaptations Arranged Independently**

Where a resident independently funds and arranges adaptation works outside the Council's processes and without a Disabled Facilities Grant, responsibility for the design, installation, maintenance and warranties rests entirely with the resident and their chosen contractor.

For council tenants, permission must be obtained from the Council before any structural alterations are carried out. Any approved works must comply with the Council's policies and conditions relating to alterations, and adaptations may be required to be removed or reinstated when the tenancy ends.

## **5.10 Equality and Diversity**

An equality impact assessment has been undertaken for this policy and agreed by the Equalities Team.

Disabled people, older adults, women, residents from minority ethnic communities, low-income households and unpaid carers are disproportionately affected by the Housing Adaptations Policy. These groups are more likely to need adaptations and more likely to experience harm from delays, inaccessible communication or complex

processes. Ensuring accessible information, non-digital contact routes, clear decision-making and timely delivery is essential to avoid widening existing inequalities.

## **5.11 Request to Review**

Residents wishing to query or challenge an Occupational Therapy assessment, a Disabled Facilities Grant decision, or adaptations within council-owned homes should direct their to the Council through Care Direct. The Council will consider the concerns raised and, where required, will conduct a review of the original assessment or recommendation.

Where an adaptation in council housing is refused in line with the Making Best Use of Stock policy, the resident may request a review within three months of the decision via the MBUS Team. The Council may ask for further information, including medical evidence where relevant. Reviews will normally be carried out by a senior officer and another manager or health professional, and the resident will be informed of the outcome.

## **5.12 Complaints**

If residents are unhappy with the services provided by BCC or how their concerns have been handled, they're encouraged to use the official complaints procedure.

[Complaints and Feedback](#)

# **6. Quality Assurance**

## **6.1 Publishing**

This policy is published on the BCC Website and communicated to relevant operational teams via policy briefings and other appropriate communications.

## **6.2 Review**

This policy will be reviewed in 3 years or sooner if there is a change to legal or regulatory requirements, in accordance with our procedures.

## **6.3 Monitoring and Reporting Requirements**

Service delivery and performance is measured against the Housing and Landlord Services Performance Framework. BCC uses performance management to enhance service standards and improve tenant and resident experience.

In relation to this Policy, BCC will monitor:

- Key performance indicators (KPIs) set through Housing and Landlord Services and any other reporting responsibilities required by the Regulator of Social Housing.
- Quarterly reporting to the Integrated Care Board (ICB) on Disabled Facilities Grant (DFG) activity, including outcomes and use of DFG funding.
- Annual Disabled Facilities Grant reporting, which must be audited and submitted in line with national requirements. These returns contribute to national monitoring of the DFG via the Department for Levelling Up, Housing and Communities.
- For council-owned homes, landlord-related compliance where applicable, such as lift installation records, servicing requirements and any associated safety compliance, noting that broader statutory reporting duties for DFGs do not apply to HRA-funded adaptations.

This information helps the Council understand demand, monitor performance, support effective asset management, and ensure that adaptations continue to be delivered safely, efficiently and in line with statutory expectations.

## 7. Appendices

### Appendix A – Roles and Responsibilities

<b>Job/Team Name</b>	<b>Description of responsibilities</b>
Director of Housing and Landlord Services	<ul style="list-style-type: none"> <li>• Holds overall responsibility for implementing the Housing Adaptations Policy and ensuring it aligns with landlord duties and regulatory standards.</li> <li>• Authorises the highest-value or most complex major adaptations within delegated limits.</li> <li>• Provides strategic oversight where adaptation decisions affect long-term sustainability of the housing stock.</li> </ul>
Head of Service	<ul style="list-style-type: none"> <li>• Authorises major adaptations within the mid-range delegated threshold and ensures decision-making principles are applied consistently.</li> <li>• Oversees service performance, risk management and resolution of complex cases.</li> </ul>
Service Manager	<ul style="list-style-type: none"> <li>• Approves adaptations within their delegated financial limit and confirms funding availability before works are instructed.</li> <li>• Manages day-to-day workflow across assessment, technical survey and delivery pathways.</li> </ul>

	<ul style="list-style-type: none"> <li>• Ensures decision-making, documentation and case progression are recorded clearly and meet audit requirements.</li> <li>• Is responsible for overall management of operational teams and service delivery.</li> </ul>
Occupational Therapist	<ul style="list-style-type: none"> <li>• Completes assessments of functional ability, daily living barriers and risks, and recommends appropriate equipment or adaptations.</li> <li>• Works with technical officers to ensure proposed solutions meet assessed needs and are likely to remain suitable over time.</li> <li>• Provides professional input into reconsiderations or reviews where assessment decisions are queried.</li> </ul>
TEC (Technology Enabled Care) Assessor/TEC Team	<ul style="list-style-type: none"> <li>• Assesses suitability for technology-enabled care and installs TEC equipment where appropriate.</li> <li>• Reviews TEC arrangements and provides advice on use, monitoring and returning TEC equipment.</li> <li>• Offers TEC as an alternative or interim measure where it may reduce risks or prevent more invasive work.</li> </ul>
Adaptations Surveyor	<ul style="list-style-type: none"> <li>• Assesses property feasibility and identifies options that are structurally achievable and safe.</li> <li>• Prepares drawings, specifications and schedules of work, and manages technical compliance requirements.</li> <li>• Monitors works on site (where the Council arranges the scheme) and confirms completion before certification and payment.</li> </ul>
OT Technicians	<ul style="list-style-type: none"> <li>• Carry out minor adaptations in owner occupier and private rented properties following an OT referral</li> </ul>
Contractors (External)	<ul style="list-style-type: none"> <li>• Deliver adaptation works in line with the agreed specification, timescale and safety requirements.</li> <li>• Provide necessary compliance certificates on completion.</li> <li>• Support handover by supplying warranty information for installed items where applicable.</li> </ul>
Caseworkers	<ul style="list-style-type: none"> <li>• Guide residents through the adaptations process, providing updates, helping with forms, and coordinating information between teams.</li> <li>• Manage and track cases through referral, consent, approval and delivery stages.</li> <li>• Ensure all required records, documentation and final certifications are in place so cases can be closed and payments processed.</li> <li>• Maintain accurate case records, correspondence and documentation to support monitoring, audit and performance reporting.</li> </ul>

	<ul style="list-style-type: none"> <li>• Issue standard communications and support internal approval processes, ensuring appropriate version control is maintained.</li> </ul>
Care Direct	<ul style="list-style-type: none"> <li>• Acts as the first point of contact for adult referrals and provides initial advice.</li> <li>• Directs cases to the appropriate assessment or technical pathway.</li> <li>• Arranges appointments or equipment delivery where appropriate and logs key information at first contact.</li> </ul>
Disabled Children's Service	<ul style="list-style-type: none"> <li>• Receives and coordinates referrals for disabled children and young people.</li> <li>• Arranges assessment and works closely with other professionals on complex cases.</li> <li>• Supports families through funding or grant processes specific to children.</li> </ul>
External support agencies (WE Care & Repair, etc.)	<ul style="list-style-type: none"> <li>• Provide independent advice to residents considering moving home or arranging their own works.</li> <li>• Offer agency services for residents who commission them, including obtaining estimates and supervising works.</li> <li>• Support residents across tenures with viewing properties, completing forms and identifying suitable housing options.</li> <li>• Assist residents to obtain relevant permissions to enable any construction work to progress (Building Control or planning approval).</li> </ul>

## Appendix B – Legal and Policy Context

<b>Care Act 2014</b>	The Care Act 2014 provides the legal framework for assessing and meeting eligible care and support needs for adults. Equipment, minor adaptations and Technology Enabled Care may be provided to support wellbeing, independence and safety and are not subject to a means test.
<b>Equality Act 2020</b>	Places a duty on public bodies to avoid discrimination and to make reasonable adjustments for disabled people when exercising their functions.
<b>Housing Grants, Construction and Regeneration Act 1996 – Disabled Facilities Grants (DFGs)</b>	This Act sets out the statutory framework for Disabled Facilities Grants, which fund necessary and appropriate major adaptations to help disabled people live safely and independently at home. Eligibility and means-testing requirements are defined in legislation.

<b>Regulatory Reform (Housing Assistance) (England and Wales) Order 2002 – discretionary assistance</b>	This Order gives local authorities discretionary powers to provide housing assistance, including adaptations, outside the statutory Disabled Facilities Grant framework. Any discretionary support is provided in line with local policy and available resources.
<b>Children Act 1989 and Chronically Sick and Disabled Persons Act 1970 – children and young people</b>	These Acts provide the legal framework for assessing and meeting the needs of disabled children and young people. Disabled Facilities Grants for disabled children and young people are not means tested.
<b>Mental Capacity Act 2005</b>	Provides the legal framework for decision-making where an individual may lack capacity, including best-interest decisions and involvement of advocates where appropriate.
<b>Human Rights Act 1998</b>	Requires the Council to act proportionately and fairly, particularly where decisions affect a person’s home, private life or dignity.
<b>Social Housing (Regulation) Act 2023</b>	Strengthens consumer regulation and underpins the Safety and Quality Standard and Transparency, Influence and Accountability Standard for council tenants.

### **Internal Documents/Policies**

- Making Best Use of Stock (MBUS) Policy
- Repairs and Maintenance Policy
- Voids and Relets Policy
- Financial Assistance Policy
- Directorate Scheme of Delegations: Housing Directorate
- Fire Safety Policy (including PCFRA)