



Equipment and Adaptations Policy

Date of approval	January 2026
Responsible director	Paul Butterworth - Director of Assets
Policy monitoring body	Customer Committee & Development & Homes Committee
Resident input into policy	Customer Experience Committee 11/11/2025
Date for policy review	January 2029
Linked strategies/policies	Asset Management Strategy Allocations Policy Empty Homes Policy Complaints Policy Data Protection Policy Equality and Diversity Policy Adaptations Procedure Guide
Version/date	V5 – January 2026

1. Background

- 1.1. Wythenshawe Community Housing Group (WCHG) recognises that disability can affect a person's ability to fully access their home and live independently. This policy sets out our approach to responding to the needs of customers in an efficient, responsible and culturally sensitive way.
- 1.2. WCHG has a regulatory duty to work in partnership with the Local Authority to provide an adaptations service as set out in the Safety and Quality Standard published by the Regulator for Social Housing, in April 2024. The Local Authority holds the primary responsibility to assess and allocate adaptations funding. Specifically, WCHG as a Registered Provider must:
 - Clearly communicate to tenants and relevant organisations how they will assist tenants seeking housing adaptations services.
 - Co-operate with tenants, appropriate local authority departments and other relevant organisations so that a housing adaptations service is available to tenants where appropriate.
- 1.3. WCHG will work with Manchester City Council (MCC) in accordance with the Partnership Agreement for the Delivery of Adaptations to WCHG Properties ¹ in the Manchester region. This service is supported financially by the Government's Disabled Facilities Grant, (DFG), that is administered by MCC. WCHG will allocate an annual budget to supplement this Government funding, in line with the partnership agreement.
- 1.4. WCHG will, as required enter into agreements with other local authorities, to ensure that residents whose homes are not in the Manchester region, can access equipment and adaptations funded by DFG.

2. Aims of the Equipment and Adaptation service

- 2.1. By funding and supporting the delivery of equipment and adaptations, WCHG will:
 - Ensure customers are supported wherever practical to live independently & safely and that needs are proactively identified to enable timely information on equipment and adaptations available.
 - Ensure we balance the competing priorities of immediate needs of current customers with long term best use of our available homes to maximise use of our limited stock and resources.
 - Ensure there are clear channels of communication and established joint working practices with our local authority and wider partners.

¹ Partnership Agreement between WCHG and MCC – Delivery of adaptations to WCHG properties utilising DFG
5th June 2025 Provided at Appendix 1

- Future proof homes at the design stage and as part of investment work to minimise or eliminate the need to undertake future adaptations.
- Encourage the use of well-designed and aesthetically pleasing adaptations.
- Comply & align with good practice guidance and legislation.

3. Risk Management

- 3.1 The WCHG Board annually review the Corporate Risk Register and agree the risk appetite for each one. The WCHG Audit and Risk Committee is responsible for overseeing the management of corporate risks associated with this policy.
- 3.2 The Customer Experience Committee and Dev/Homes Committee are responsible for overseeing the implementation of this policy.
- 3.3 The Head of Repairs and Head of Housing are responsible for the day-to-day management and mitigation of risk.

The specific risks associated with this policy are:

SR3 - Regulatory Standards, laws, legislation and compliance: Non-compliance with regulatory standards, laws and legislation. Board Appetite – **Averse**

SR6 - Customer expectation and demand management: Inability to prioritize and moderate customer expectation and demand management. Board Appetite - **Cautious**

SR8 - Asset quality, repairs and building safety: Failure to effectively manage asset quality and building safety. Board Appetite - **Averse** (but open to innovation)

- 3.4 We will maintain a suite of procedures and processes, and provide adequate resources to implement them, to mitigate the risk of service delivery failing to adhere to this policy.

4. Scope

- 4.1 The adaptation service is available to WCHG tenants who have been assessed by MCC, or other Local Authority, as needing a minor or major adaptation installed at their home, to facilitate independent living.
- 4.2 This policy governs the communication and assistance WCHG provides to all tenants in respect of disabled adaptations, and recognises the role played by Local Authorities in administering the allocation of DFG funding.

- 4.3. All requests for landlord consent for adaptations will be reviewed by WCHG, to ensure the work is practical and that it is reasonable to grant Landlord consent for the work to be undertaken.
- 4.4. To ensure that the most appropriate housing options are considered for each customer, approval for any major adaption is subject to there being no suitable re-housing option available to the customer under our allocations policy. Please see details of our housing commitments in the WCHG Allocations Policy Sept 2022.pdf.
- 4.5. The provision of the adaptations service is subject to the availability of financial resources that will be set out each year in the business planning process.

5. Definitions

- 5.1. **Disabled** person, as defined by the Equality Act 2010 is a person with 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.
- 5.2. An **adaptation** is an alteration or addition to a property, or the installation of fixed pieces of equipment or specialist equipment, to support someone's ability to live independently.
- 5.3. **Equipment** is and aid or device that assist someone to undertake activities in their home. Generally, these can be moved and do not require any alterations to the home itself. For example, walking frames, shower chairs, grabbers.
- 5.4. A **minor** adaptation is work that costs less than £1,000 to complete including fitting but excluding VAT. They are the most common adaptation delivered and funded by WCHG, subject to the annual affordability review. They are small changes to the home such as installation of grab rails, ramps or lever taps.
- 5.5. A **non-standard minor** is an adaptation costing less than £1,000 but one that may require a technical feasibility completing, or some kind of specialist equipment ordering.
- 5.6. A **major** adaptation costs between £1,000, and the national Disabled Facilities Grant (DFG) £30,000 cost cap. They are more complex than minor adaptations, and include for example, fitting a level access shower, installing a complete wet room, altering the layout of rooms and door widening to accommodate wheelchair access, or full property extensions. DFG funding is accessed through the relevant Local Authority.
- 5.7. **DFG** is a government grant administered by the Local Authority and is available to all residents, regardless of tenure, if eligibility criteria linked to an Assessment of Need (AON) is met. The amount of DFG payable is determined by the resident's household income and savings. This 'means testing' is a policy of the Local Authority.

5.8. An **AON** is the formal identification by MCC, of the tenants support requirements that can be met by a major or minor adaptation.

5.9. **Referrals** are requests by residents to be assessed for an adaptation to assist them live in their home independently.

6. **Funding and delivery of equipment and adaptations**

6.1. WCHG will work collaboratively and in partnership with MCC to deliver the minor and major adaptation service in line with the Partnership Agreement provided at Appendix 1.

6.2. WCHG will work with other local authorities as required to support requests for adaptations in properties that fall outside of the Manchester region,

6.3. WCHG will 100% fund and arrange for the installation of all minor adaptations that are requested through the Manchester Service for Independent Living (MSIL) referral process. This funding remains subject to annual affordability by WCHG identified during the business planning process.

6.4. The allocation of DFG funding is managed by the local authority. It is awarded to the tenant, to cover the cost of a major adaptation between £1,000 and £30,000.

6.5. WCHG will fund a discretionary contribution, (where annual budgets allow), towards the cost of a major adaptation, in line with the Partnership Agreement between MCC and WCHG. The funding is a capped budget identified during the annual business planning process, is subject to any suitable rehousing options being available to the tenant.

6.6. WCHG will support residents to request equipment and adaptations through the local authority's referral process, to ensure they are accessing DFG funding.

6.7. The local authority will assess each residents case and complete the AON to identify the work needed. They will then determine if the work is:

- Necessary and appropriate to meet the disabled person needs.
- Reasonable and can be done, depending on the age and condition of the property.

6.8. The Local Authority will undertake means testing of the disabled persons household to determine if DFG can be paid and the amount of award.

6.9. The following options remain available to residents where DFG is not awarded:

- Self-Funding and Charitable Funding: residents can fund the installation of their adaptation or they can apply to other charitable sources. WCHG may request an Occupational Therapist assessment before deciding to grant landlords permission for the work.

- WCHG Funding; Where no funding is available from the local authority of health and care services, WCHG will consider funding minor adaptions to support a person to live independently and sustain their tenancy up to a maximum of £1000.
- The resident can appeal the decision using the Local Authorities complaints process. Once all stages of the complaints procedure has been followed, if required the complaint can be progressed to the Local Government and Social Care Ombudsman.

6.10. WCHG will not fund adaptations for residents in leasehold, shared ownership or rent to buy properties. They can apply direct to the Local Authority for DFG funding.

6.11. Where a major adaption is required and DFG funding is awarded, WCHG will consider providing landlords consent for the work to go ahead in line with the approval criteria. The intention will always be to identify the solution most appropriate for all parties.

6.12. The criteria for refusing landlords consent for a major adaption is:

- The adaption will have a long term detrimental impact on the future viability of the property asset and the ability to let it.
- The AON confirms the tenants need will most effectively be met by re-housing. If the tenant has not been rehoused within 6 months of the date of the AON the decision will be re-assessed.
- The tenant has not met the criteria for a major adaptations and does not therefore qualify for DFG funding.
- The technical feasibility study proves that the proposals are not viable, reasonable or practical. WCHG will work with the Local Authority to identify alternative solutions and consider re-housing options.
- The property has been identified for disposal or major refurbishment.
- There are insufficient financial resources available, or it is not financially prudent to undertake the work.
- The person who is the subject of the AON is not the named tenant on the tenancy agreement or their dependent.

6.13. When an adaptation is requested for a communal area, the requirements of the Equality Act 2010 apply, but the views of other residents will be considered in line with the WCHG Resident Engagement Strategy. The consultation outcome will influence the granting of consent for the adaption on a case by case basis.

- 6.14. For homes built/commissioned by WCHG, these will consider the 16 principles of lifetime homes and adopt specifications & standards designed to accommodate the needs of our existing & future customers. This will adopt the principle of *lifecycle investment costing* and *adaptation avoidance* to ensure well designed and appropriately built in equipment that provides dignity for our customers.
- 6.15. WCHG will maintain focus on achieving value for money in the procurement of minor adaptations, and in the efficient and effective support provided for the delivery of major adaptations. All activity will be in line with WCHG Financial Regulations and Procurement Policy.
- 6.16. It is a breach of Tenancy or Lease Agreement to fit equipment or install an adaptation without the written consent of WCHG. This may result in legal action being taken, or potential recharges for any repairs or other maintenance costs.

7. Maintenance, Servicing and Removal of Adaptations

- 7.1. **Repairs:** The funding of ongoing repairs and maintenance of an adaptation is as follows:
 - If a minor repair is needed on an approved adaptation in a rented property, it is funded through the WCHG repairs budget.
 - If a minor repair is needed on an approved adaptation in a leasehold property this is funded by the resident in accordance with their lease.
- 7.2. **Replacement:** If an adaptation needs replacing, WCHG will support the resident to apply to the Local Authority for a replacement. If access to DFG funding is not available WCHG will consider fully funding the work, if an Occupational Therapist assessment demonstrates an on-going need for the adaptation. Renewals will align with our Asset policy and approach to component lifecycles.
- 7.3. **Servicing:** Some adaptations, for example stair lifts and through floor lifts, will require ongoing maintenance servicing. Before permission is given to install an adaptation with an ongoing servicing requirement, a service charge will be introduced to cover the maintenance cost, based upon estimated annual servicing costs. This may require a change to the tenancy agreement and will be a condition of granting landlord consent for the adaptation.
- 7.4. **Removal and Re-use:** As part of the empty homes process, WCHG will decide if the adaptation will remain or be removed. This will be a case by case decision between the Empty Homes Manager, Neighbourhood Manager (Allocations Lead) and the Local Authority. Whenever possible the adaptation will be used or recycled to ensure best use if the investment is achieved. If a major adaptation is requested to be removed from a property due to the adaptation no longer required by the occupiers, this may be refused on the grounds of value for money and appropriate future use of that investment into the home.

8. Customer Support

- 8.1. WCHG will promote the existence of the adaptations service to ensure customers are aware of it and understand how to access it.
- 8.2. WCHG will actively support tenants with their application for minor or major adaptations. This may include alternative homes options, rightsizing and household advice to achieve the best outcome for each request. If the tenant is dissatisfied with the outcome of our decisions or adaptation referral process, we will discuss their case with the Local Authority to consider options and solutions.
- 8.3. We will gather transactional satisfaction data from customers who have a minor adaptation installed at their home. Results will be used to influence future service standards and reported within our performance management framework.
- 8.4. Customers who are dissatisfied with the service provided by WCHG can use our Complaints Policy if the team are unable to resolve the issue.

9. Criteria for refusing landlord consent for a major adaptation

- 9.1. Consent for a major adaptation to be installed, will not be given when:
 - The tenant's AON confirms their need will most effectively be met by re-housing. If the tenant has not been rehoused within 6 months of the date of the AON the decision will be re-assessed.
 - The tenant does not meet the criteria for a major adaptation and does not therefore qualify for DFG funding.
 - The technical feasibility study proves that the proposals are not viable, reasonable or practical. Under these circumstances WCHG will work with MSIL to identify alternative solutions and consider re-housing options.
- 9.2. Consent for a major adaptation may not be given when:
 - The property has been identified for disposal or major refurbishment.
 - There are insufficient financial resources available, or it is not financially prudent to undertake the work.
 - The person who is the subject of the AON is not the named tenant on the tenancy agreement or their dependent.

10. Rehousing

- 10.1. Rehousing to a more suitable property will be considered for all customers requesting a major adaptation, to ensure this option is included when identifying

the most suitable and practical way to meet a customers need. Customers may receive communication from housing colleagues to discuss rehousing under the rightsizing policy, to find a more suitable property to suit their needs.

- 10.2. WCHG will, where possible, re-let suitable adapted properties to applicants who are waiting for adaptations, to reduce the number of adaptation removals and maximise value for money.
- 10.3. Assistance to move to more suitable properties, such as paying removal costs, fitting new carpets, installation of white goods, may be offered to tenants, based on the specific case and the individual needs of the tenant. WCHG have other supporting policies that will be accessed in these circumstances, e.g. rightsizing.

11. Monitoring and Reporting

- 11.1. WCHG will develop an annual resource plan in line with the business planning process, to ensure resources are available to support the delivery of our adaptations service.
- 11.2. WCHG will monitor service delivery against a range of internal key performance indicators, and those set out in the Partnership Agreement with MCC.
- 11.3. WCHG will attend quarterly meetings with MCC to review performance against the Partnership Agreement.
- 11.4. Management performance will be routinely monitored through a tailored Power BI dashboard and reported into WCHG Leadership Team for their oversight.
- 11.5. The Customer Experience Committee are responsible for having oversight of this policy's delivery and its impact on customers.

12. Roles & Responsibility

- 12.1. The WCHG Board is responsible for setting the strategic objectives and direction that this policy supports.
- 12.2. The Customer Experience Committee and the Development and Homes Committee are responsible for oversight and the approval of this policy, following its review every three years.
- 12.3. The Executive Director of Assets has strategic responsibility for, and oversight of the implementation of this policy.
- 12.4. The Executive Director of Customers and Communities, has strategic responsibility for ensuring the most suitable housing & support options are identified for customers and representing WCHG on the Housing Access Board.

- 12.5. The Head of Repairs is responsible for the operational delivery, management and monitoring of this policy.
- 12.6. The Head of Housing has operational responsibility for ensuring customers are supported effectively during the process to identify the most suitable way to meet a tenants need.
- 12.7. The Operations Manager (Maintenance and Building Adaptations) has operational responsibility for delivering the Equipment and Adaptations service

13. Equality and Diversity

- 13.1. WCHG are committed to providing excellent customer services, which are fair, equitable and inclusive. We will make every reasonable effort to ensure that no-one is discriminated against directly or indirectly because of any protected characteristic as defined by the Equality Act 2010 and in line with our reasonable adjustments statement.
- 13.2. We recognise that some protected groups may be disproportionately impacted and will take additional steps in the application of this policy and make reasonable adjustments to ensure compliance with the Act. If you require this policy in a different format, translated, large print, easy read, braille, or an audio copy, contact us by phone on: 0300 111 0000 or by email: inclusionanddiversity@wchg.org.uk.

Appendix 1

Partnership Agreement Between Wythenshawe Community Housing Group and Manchester City Council

Delivery of Adaptations to WCHG properties
utilising Disabled Facilities Grant
Period of Agreement: 24 months
Agreement Date: 5th June 2025

Parties to the Agreement

[RP] – Wythenshawe Community Housing Group - WCHG

Local Authority (LA) – Manchester Equipment C Adaptations Partnership, Manchester City Council, Philips Park Road, Beswick, Manchester M11 3FU.

1. Principles of this Agreement

- a. This agreement between [RP] and the Local Authority is for the provision of adaptations to the homes of [RP] tenants where an assessed need requires an alteration or addition to the structure and/or fabric of the property to enable that tenant, or a member of their household, to continue to live independently at the property.
- b. The agreement is built around an understanding that, as a responsible landlord, [RP] seeks to respond to the needs of disabled tenants and that the Local Authority has a statutory responsibility to assess the needs and secure the provision for disabled people living in the city.
- c. The funding for Major adaptations will be funded in partnership between [RP] and the Local Authority. Both parties will work collaboratively to deliver within combined resources and as a benchmark subject to available budgets, seek to provide a contribution towards the total cost of Major Adaptations made up of 60% provided by LA and 40% [RP]. This includes a 15% management fee.
- d. Should the estimated cost of works for any one individual property exceed the agreed combined limit from both [RP] and the Local Authority or the works cannot be technically carried out, in the first instance the Local Authority is to pursue other options on behalf of the tenant. This may include identifying other sources of funding or re-housing the tenants into another suitably adapted property.
- e. The funding for Minor Adaptations will be met 100% by [RP].
- f. Requests for adaptations will be made by the Local Authority and supported by a

recommendation from the Council's Registered Occupational Therapist (OT) after an assessment .

- g. If the needs of the tenant change the tenant can request a reassessment through the Local Authority. Any complaint regarding the quality of service provided will be investigated under Manchester City Council's complaints procedure.
- h. The parties will work to the principles contained within this document from the agreement commencing on 01/09/2024 and is subject to annual review.

2. Responsibilities for Processing of Major Adaptations

The LA will provide a Core Service involving the following processes and responsibilities.

Process	Description
First contact	Advice and information gathering from customer or their representative about what may be required, and what the key issues for them are. Initial screening process for needs, and investigation into what service would be most appropriate
Professional referral	This may include a full or partial assessment of need, and information on the applicant which will inform the next stage of the process.
Triage	Deeper level information gathering about the customer, what their health needs are, financial circumstances, housing tenure and condition, other people in the household, and other information relevant to the application and needs assessment. Decision about course of action to take. Allocation to Caseworker / Trusted Assessor and identification of Occupational Therapist / Technical Officer / Trusted Assessor as appropriate. Arrangements for first visit if appropriate.
Assessment of need	<p>First visit to the customer to assess needs and eligibility, and start paperwork process / preliminary test of resources. Discussion with customer on what will happen next and options Trusted Assessor assessment if appropriate.</p> <p>Assessment of an individual's needs that could be met or reduced through an adaptation. This may also include an assessment of other needs and referral for other council and professional services.</p> <p>Assessment of the home for suitability for adaptation. Identification of other hazards in the home, for example through the Housing Health and Safety Rating System (HHSRS). Drawing of plans and writing schedule of works. Assessing whether external expertise (such as architects or surveyors) is required.</p>
Financial Assessment	Assessment of financial contribution by client. Sourcing of additional funding if required. If no grant is payable, then options discussed with the client, including benefits of 'nil grant' assessment.
Approval of Works	Approval of schedule of works. Authorisation to proceed to tendering/framework processes for the engagement of contractors to carry out the works.
Grant Approval	<p>Review of the whole case; ensure application is valid and complete; approval of works required, contribution, and calculation of grant to be awarded.</p> <p>Confirmation of client eligibility for grant assistance. Approval to commit Capital</p>

	Grant and any discretionary funding if appropriate. Approval to apply for external funding if required.
Management of Works	Standard work allocated through Contractor Framework. Complex work tendered on behalf of the client. Site visits and liaison with contractor where required. Signing off finished work as complete. Ensuring snagging or outstanding defects are rectified.
Closure	Receipt, appraisal and payment of contractor invoice. Register financial interest as a land charge if appropriate. Register warranties etc as appropriate. Follow up visits / survey. Ensure all logs and records are complete. Ensure onward referrals are enacted. Close case.

The LA may also carry out the following services in addition to the Core Service:

- Benefit eligibility and advice
- Sourcing and applying for charitable funding for necessary works but where grant funding is not available.
- Assistance, advice and information in relation to housing options where a current home is not suitable or cannot be adapted.
- Identifying potential energy efficiency measures to reduce excess cold in an individual's home, and to recommend or refer to suitable schemes where appropriate.
- Assistive Technology solutions which assist with living independently at home.
- Information, advice, signposting or onward referrals to other statutory and third sector services that may benefit the client or their family and carers.

The [RP] will provide:

- Assistance and advice with moving home where adaptations are not suitable.

3. Common responsibilities

- a. To each identify a lead person who will act as the main contact point in relation to this agreement.
- b. To share information on what budget each party has available for the works under this agreement in any given financial year.
- c. To meet quarterly to review the operational matters and the delivery of this agreement and any external drivers that may affect future delivery of services to residents.
- d. To work collaboratively to ensure that processes are coherent and customer focused to avoid unnecessary delays that jeopardise the wellbeing and independence of our residents.
- e. To work together to ensure best value in meeting the tenants identified needs.
- f. All electronic correspondence between each party which contains the personal data of tenants must be securely encrypted.
- g. Both [RP] and the Local Authority will maintain a list of staff with permission to access the personal data relating to tenants who are eligible for an adaptation.
- h. [RP] and the Local Authority will both agree with the schedule and drawing (where applicable) of works.

- i. For the cancellation of any works, due to unforeseen circumstances, during the implementation stage of a Major Adaptation, the cost to cover all materials and professional costs are to be split equally.

4. Quality Assurance, Monitoring and Review

Both [RP] and the Local Authority will commit to regular monitoring and review of these working arrangements and service performance. The parties will meet a minimum of once in the financial year. The content of these meeting will cover as a minimum the following;

- Key Performance Indicators (set out in the Appendix to this agreement) • Accumulative expenditure against budget
- Changes to pricing schedules
- Client satisfaction and client complaints • Identification of trends
- Optimising processes and procedures
- External factors affecting this agreement.

5. Dispute Resolution

In the event of a dispute that cannot be resolved at an operational level both parties agree to nominate a senior officer to work together to explore and find agreeable solutions in the spirit of partnership working. Should this not be achievable both parties agree to arbitration by an independent third party.

6. Termination of the agreement

Each party is entitled to terminate this agreement by giving 1 month notice in writing to the Head of Service by post and/or email with an acknowledgement.

7. Agreement start date

5th June 2025

Signed by WCHG:



Signed by Local Authority

MCC Example Performance and Finance Information :

RSL Name (1 April – 31 August 2024)

Assessments of Need (1 April – 31 August)			
AoNs over £30,000		Priority	Estimated Cost
Number of Assessments of Need		189	
Estimated Cost		£1,599,650	
Number - high priority		24	
Number - greater than £30,000		7	
Bed/Bath Extension		High	£75,000
Enlarged Bathroom, Bed/Bath Extension, Miscellaneous		Normal	£75,000
Bed/Bath Extension		High	£75,000
Bed/Bath Extension, Special Bath, Ramp		Normal	£90,000
Bed/Bath Extension		High	£105,000
Ramp, Bathroom Extension, Miscellaneous		Normal	£33,000
Bed/Bath Extension		Normal	£75,000

Works Ordered (1 April– 31 August)		
Number of Orders		21
Total Cost Ordered		£195,424

Completions (1 April – 31 Aug)	Stage 1: First contact to assessment G identification of relevant works	Stage 2: Identification of relevant works to submission of formal grant application	Stage 3: Formal grant application to grant approval	Stage 4: Approval of grant to practical completion of works
Time taken (days)				
Completed Works (12 completed)	28	12	85	28
	168	100	156	33
	90	23	47	23
	140	35	213	20
	47	50	298	-70
	159	18	229	29
	38	43	221	72
	22	61	1	1
	142	18	7.0	21
	124	45	254	22
	87	25	233	26
	49	22	3	49
Average (days)	61.2	37.7	145.6	21.2

Cancellations (1 April –31 Aug)	
Installed by housing provider	1
Client died	2
Decided not to proceed	1
No assistance needed	1
Move to alternative independent housing	1
Declined service	1
Total	7