

UNIVERSITY COLLEGE LONDON
FACULTY OF THE BUILT ENVIRONMENT
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PUT UP OR SHUT UP?

CAN THE GOVERNMENT CONTINUE TO JUSTIFY THEIR INCENTIVES SUPPORTING OLDER PEOPLE TO 'STAY PUT' IN THEIR TRADITIONAL HOMES GIVEN THE GROWING ECONOMIC, ENVIRONMENTAL, SOCIAL AND POLICY IMPEDIMENTS TO THIS IN CONTEMPORARY SOCIETY? IF NOT, HOW CAN THE BRITISH PLANNING SYSTEM RESPOND TO THE NEED FOR ADDITIONAL HOUSING OPTIONS FOR OLDER PEOPLE?

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BEING A REPORT SUBMITTED TO THE FACULTY OF THE BUILT ENVIRONMENT AS PART OF THE REQUIREMENTS FOR THE AWARD OF THE MSc SPATIAL PLANNING AT UNIVERSITY COLLEGE LONDON:

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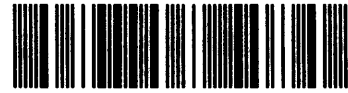
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ABSTRACT

This paper critiques the government's policy of encouraging older people to 'stay put' in their traditional homes on the basis that to do so incurs serious policy contradictions. This is because staying in the family home frequently entails under-occupancy and social isolation, which are contrary to sustainable development and inclusive community principles. 'Staying put' is also shown to jeopardise the economic security of older people since it can result in fuel poverty. Based on these environmental, social, economic and policy criticisms, this study focuses on the potential of retirement villages to provide appropriate and desirable housing for older people. It suggests that retirement villages often avoid the negative implications 'staying put' encounters, and therefore represent an important way of readdressing housing choice. Taking three varying housing developments, this paper then explores the challenges and opportunities incurred by alternative forms of housing at different developmental stages. These studies show that advancements have been enabled despite rather than due to current planning policies. It is argued that overlooking the fiscal contributions of older people in a contemporary society has resulted in limited housing choice for these populations, and so government and policy-makers are not responding adequately to social change. This suggestion is strengthened by the report's findings that to date, the delivery of retirement villages and therefore additional housing choice, have been led by the private and voluntary sectors.

INTRODUCTION

Despite being a rapidly ageing population, older age receives very little representation in policy debates. Research undertaken to determine the context of government guidance reveals that more often than not, retirement is synonymous with dependency, ill health, and most importantly, economic inactivity.¹ The consequences are that older people are sidelined or even eclipsed from political discourses. This report examines the British government's policies for older people's housing. It explores how supporting older people to 'stay put' in their traditional homes, on the premise that this safeguards the ideals of independence, well-being and choice, is not compatible with wider economic, environmental and social objectives, and thus creates policy contradictions. For example, 'staying put' often results in under-occupancy, which results in an unsustainable use of housing stock, energy inefficiency and social exclusion. The argument is presented that the government must respond to social changes, such as improving life expectancy, growing financial security and higher life expectations in older age, in order to capitalise on the economic potential of older people. To do so, it is argued, would ensure policies truly reflect current and future needs.²

Chapter one provides a review of academic responses to government policy for older people. In this section, the contradictions of supporting 'staying put' agendas as well as sustainable and inclusive community initiatives are displayed. As such, this section provides a critique of the 'staying put' programme. In the second chapter, the discussion is advanced to demonstrate the potential of retirement communities to provide housing for older people that does not conflict with other government agendas. Here it is revealed that academic debate is beginning to recognise the potential for retirement villages and extra-care complexes. This chapter does not include a discussion on planning for retirement villages since the research to date has focused predominantly on the social implications of such schemes. To further investigate the possibilities presented by retirement communities, three case studies are undertaken and these constitute the third chapter. These contemporary approaches to housing the elderly are all analysed in terms of their social, economic and environmental consequences, and how the planning system, in each instance, has served to promote or impede attempts to achieve such supply. Each case study was purposefully chosen to highlight different stages of planning and development.

The first case study of the Elderflowers Project in Milton Keynes illustrates the issues involved in initial planning processes, such as securing an appropriate site and local authority support. The second case focuses on securing planning permission for a retirement village in North

¹ Refer to Annex 1

² The purpose of this report is not to contest the right older people have to remain in their traditional dwellings. The critique arises from the government asserting that 'staying put' is the most appropriate way to secure independence, choice and well-being.

Wiltshire. Here the impediments to providing this housing at the application and appeal stages are highlighted. The third case study examines the social, economic and environmental outcomes of one of the first retirement villages in England: Berryhill in Stoke-on-Trent. In response to the academic support for such schemes outlined in chapter two, this study gauges the efficiency of these developments in reality. The way in which such projects have affected local planning policies is fully illustrated here.

The case studies were selected on the strength that they are 'live' schemes, therefore reflecting current adopted policies. Rather than use a flagship development such as Hartrigg Oaks for the final case study, Berryhill was selected to reveal how retirement communities are not necessarily for wealthier older people. The common trends and differences between these three cases are developed in the concluding section of chapter three. Here it is shown that although academic debate may be starting to acknowledge the potential benefits of retirement communities, little has been done to translate them into actuality through the current planning system. On the strength of these findings, recommendations are provided for how the planning system could be expanded to offer different housing options for older people. These recommendations comprise the concluding chapter of this report.

CHAPTER ONE: LITERATURE REVIEW

1.1 Introduction

'Staying put' in the traditional family home, relocating to a residential care home or moving into sheltered housing are the three main housing options available to older people in Britain. This review looks at how the trend towards 'staying put' is marketed as the preferential option, based on its ability to deliver against the indicators of independence, choice and well-being. These indicators have been put forward by the government as the principle facilitators for healthy and active ageing.³ Contrary to 'staying put', residential care is treated as the 'last resort' and sheltered housing is rapidly becoming unviable in contemporary society. This review explores academics' responses to the government's actions to show that, in many ways, encouraging staying at home contradicts other government guidelines relating to social, economic and environmental concerns. Therefore the opportunities and challenges entailed in remaining in the traditional home are presented here. The rationale behind the government's stance is also offered.

1.2 The trends: 'at home' or 'in a home' ⁴

Demographic trends show that the majority of people aim to 'stay put' for as long as possible.⁵ This is partly because staying at home is associated with maintaining control and partly because the alternatives appear unattractive. For example, 'residential care in Britain has always been seen as a provision of the last resort'.⁶ Importantly, such views are shared by older people themselves.⁷ Phrases such as 'batch living' to describe living in residential institutions have undoubtedly added to the 'trauma' associated with relocating to them.⁸

Sheltered housing also offers older people a less attractive housing option than 'staying put'. This is because it occupies an uncomfortable position between staying at home and living in a housing institution: it provides neither the independence associated with staying at home, nor offers the care and security of living 'in a home'. The legacy of this position is that a significant proportion of sheltered housing is 'difficult-to-let' and therefore represents an economically unviable housing option.⁹ Critics like McCafferty and Cooper have argued that the contemporary emphasis on independence in later life has complicated attempts to positively market sheltered housing because sheltered housing is often associated with communality.¹⁰ Given these alternatives, the tendency to 'stay put' is justified.

The challenges and opportunities faced by the 'staying put' agenda can be divided in four areas, namely social, economic and environmental considerations and policy implications and

³ Independence, Well-being and Choice (2005)

⁴ Oldman & Quilgars (1999, p.363)

⁵ '90% of older people live in ordinary or mainstream housing' (HOPDEV 2005, p.6)

⁶ Oldman & Quilgars (1999, p.363)

⁷ Counsel and Care (1992)

⁸ Goffman, E (1961), Oldman & Quilgars (1999, p.373)

⁹ Clapham, (1997, pp. 209-10)

¹⁰ McCafferty (1994), Cooper et al (2004)

the remainder of the chapter will focus on these in turn. Throughout the discourse, a comparative analysis with residential care and sheltered housing will be used. The study also investigates the consequences to both the individual and society as a whole.

1.3 Social Implications

As indicated in section 1.2, 'staying put' avoids the loss of independence entailed in living in a housing institution. For example, Bochel refers to 'dependency-producing residential care'.¹¹ The continuity of remaining at home can also sustain active social habits. This is attuned to conceptions of old age that seek to prolong middle age.¹² It is suggested that remaining at home has wider social benefits in terms of both enabling older people to contribute to community life, as well as providing social mix. Research undertaken by the Joseph Rowntree Foundation also suggests there is more support available to older people who 'stay put'.¹³ The Supporting People initiative is certainly keen to project this image.¹⁴ Residential care on the other hand is deemed 'separate and distinct from life in the community'.¹⁵

However, there are also negative social consequences to remaining at home. Firstly, it can induce social isolation. As a consultee in Baldwin's studies stated, although 'the people you are caring for might be in the community [...] they're not necessarily part of it other than through TV sets and 15 minute visits'.¹⁶ This also demonstrates how institutionalisation can occur within the home setting.¹⁷ Disintegration of social networks and patterns of geographic dispersion among family members can isolate older people; enhancing their reliance on home-care providers for social as well as medical services. Sixsmith provides an interesting hypothesis in this regard, arguing that the government's 'home focus' separates older people from their surroundings.¹⁸ This supports Townsend's 'Structured Dependency' model that the state enforces dependency on older citizens through its care and pension services.¹⁹

Secondly, although 'staying put' is marketed as conducive to healthy ageing, wider government activity contradicts this. Policy documents indicate a 'shifting [in] the focus of care, with far more hours of help being delivered to a smaller but higher-need number of households'.²⁰ Figure 1.1 illustrates this trend in showing the relationship between the number of people in receipt of home care and the hours of care delivered in England between 1993

¹¹ Bochel et al (1999, p.494)

¹² Featherstone, M and Hepworth, M (1989)

¹³ There is 'a hidden subsidy from relatives' informal caring in situations where the family play more than the role of a 'visitor' Joseph Rowntree Foundation <<http://www.jrf.org.uk/knowledge/findings/socialcare/d40.asp>> [accessed 9 August 2007]

¹⁴ Refer to Annex 1

¹⁵ Oldman & Quilgars (1999, p.367)

¹⁶ Oldman & Quilgars (1999, p.373)

¹⁷ Baldwin et al (1993)

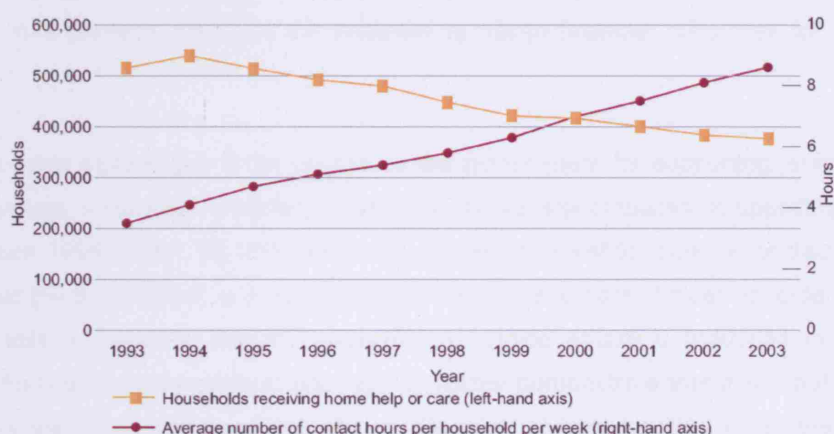
¹⁸ Sixsmith (1999, p.177)

¹⁹ Townsend (1981)

²⁰ DWP (2005, p. 48)

and 2003. Although this shift is justifiable, the concentration on higher level needs has the potential of creating a vacuum, accelerating the number of people dependant on care. Therefore 'some older people with easily met practical 'low level' needs may not be able to sustain independent living'.²¹ This position clearly conflicts with efforts to improve preventative care.²²

Figure 1.1 Changes in the number of households receiving home care services and the number of contact hours.



Source: Opportunity Age (2005, p.49)

Thirdly, older people inevitably require assistance to carry out daily activities. However, encouraging representations of old age as the elongation of middle age can have the detrimental effect of stigmatising care. Thus making older people reluctant to seek the assistance they need. This supports Clark's notion that 'help', which connotes equality between the provider and recipient, rather than 'care', which is patronising, should be promoted.²³ Nevertheless, Twigg argues that home-care facilitates an improved form of care to that received in care or housing institutions as it provides the care recipient with a greater degree of control, which is reflected in the level of respect demonstrated by the provider.²⁴ These differing positions encapsulate the complexities of providing care services in the home setting.

1.4 Economic Implications

The economic advantage of 'staying put' for the individual is that it enables financial stability, especially if the property is un-mortgaged. This is particularly beneficial in contemporary society as there is increasing pressure upon older homeowners to release equity from their homes to pay for rising care costs.²⁵ However, care is increasingly being supplied by the private sector and the market deregulation this creates will increase 'the price of goods and

²¹ Clapham, D. (1997, p.212)

²² Such as fall prevention services and home improvement policies. See Annex 1

²³ Clark et al (1998)

²⁴ Twigg (1997)

²⁵ 'Unlocking money from your home', (2007)

services which these resources [can] be used to purchase'.²⁶ This will perpetuate poverty amongst older populations and thus lead to the realisation of the 'Structured Dependency' model. Nevertheless, studies show that older people are increasingly willing to use the equity in their homes or life-savings to ensure a higher quality of living, rather than bequeath these savings to relatives.²⁷ Therefore equity release schemes may in fact empower older citizens. The economic disadvantages for the individual of remaining at home are that under-occupancy, coupled with the fact that older people typically occupy older, less energy-efficient homes means that fuel poverty and home maintenance are real concerns.²⁸ The assessment of Council Tax upon the value of the residential unit, rather than the income, age or number of occupiers in a property also has the potential to cause financial difficulties for some older people.²⁹

There are fiscal advantages to be gained by the government for supporting 'staying put'. As Oldman argues, it provides 'a perfect justification for savage cutbacks' in spending.³⁰ The fact that between 1996 - 2001, 50,000 care home places were lost for older, ill or disabled people implies that the government is providing fewer housing and care choices for older people.³¹ It is reasonable to suppose that this reduction in choice entails a reduction in the budget allocated for housing older people, although Croucher demonstrate that this is not necessarily so.³² It has also been proposed that the proliferation of care housing in an area will overburden local health resources, and therefore remaining at home represents a more sustainable housing option, at least in terms of government care mechanisms.³³ However, 'staying put', also means the government can decentralise responsibilities to voluntary organisations and informal care frameworks, thus relieving pressure on national budgets to fund these provisions. This delegation of responsibility is important as it may reveal that the government is sidelining the issue of how to house older populations, at a time when these populations are representing a growing percentage of society.

The government also sustains economic penalties by encouraging older people to remain in the traditional home. Firstly, they overlook an economic opportunity as older people contribute significantly to the nation's wealth. For example, 'older people contribute £200 million a year to the UK economy'.³⁴ This is particularly relevant as increasing numbers of older people are

²⁶ Private market share in home care 'now represents two thirds of supply having been only 2% in the early 1990's', (Surgenor 2006, p.1), Forrest & Leather (1998, p.56)

²⁷ Rowlingson & McKay (2005)

²⁸ Older people typically occupy older housing stock, built during the periods 1945-64 and 1965-84. See Elderflowers Project (2007, p.19)

²⁹ Lyons Inquiry into Local Government (2006)

³⁰ Oldman, C. (2003, p.53)

³¹ JRF (2006)

³² 'Transferring costs to other budgets does not equate to cost savings overall' Croucher et al (2006, p.81)

³³ 'Worthing Borough Council sought to apply policies to resist the proliferation of rest homes' (JRF, 2006, p.40) although paragraph 64 of DoE Planning Circular 03/2005 argues that LPA's should only concern themselves with the land-use planning considerations of planning proposals.

³⁴ HOPDEV (2006a, p.4)

able to buy themselves a lifestyle.³⁵ Research shows that current policies prioritise the housing needs and aspirations of younger workers'.³⁶ Some even argue that retirement is a 'way in which capitalism shakes out less productive labour and replaces it with younger workers'.³⁷ This indicates that national policies, in neglecting the economic input of older people may perpetuate the cycle of 'income poor but equity rich' pensioners.³⁸

Another economic disadvantage of ageing in place is 'house-blocking'.³⁹ This phenomenon underlines how staying put in the family house has a detrimental effect on national housing supply as it 'blocks' the availability of larger housing units, sought by younger generations with growing families. In the short-term this poses the issue of building what is ostensibly an over-provision of larger houses. The long-term effect of which facilitates widespread under-occupancy, particularly in light of reducing family sizes. This possibility gives weight to Brenton's proposals to support relocation in 'younger' old age.⁴⁰

1.5 Environmental Implications

Considering stringent PPS3 policies for sequential testing, protecting greenbelt land and securing the highest feasible residential densities to prevent sprawl, under-occupancy also has serious implications on environmental grounds.⁴¹ This is because "house-blocking" means older people, who generally live alone or in a couple, are occupying homes that have the capacity to house more people. Furthermore, as mention above, older people typically occupy older housing stock, and these properties will often be poorly insulated by modern standards. Under-occupancy in already energy-inefficient homes therefore represents avoidable carbon emissions. It is therefore difficult to reconcile ageing in place with sustainable and eco-friendly initiatives.⁴² There is also the concern that 'empty-nesting' induces fuel poverty, whereby heating costs equate to ten percent or more of the total household income.⁴³ Under-occupancy is further complicated by the fact that life expectancy is increasing, as this will ensure that a greater number of older couples are living for longer. Nevertheless, this trend must be considered alongside greater numbers of single person households than ever before.⁴⁴ The effectiveness of 'staying put' is predicated on the delivery of home-care as this enables frailer people to continue living at home. However, home-care presents another environmental concern. This is because it requires peripatetic carers to travel sometimes considerable lengths in order to provide brief care visits.

³⁵ Oldman, C, (2003, p.50)

³⁶ HOPDEV (2006b, p.7)

³⁷ Wilson (1997, p.343)

³⁸ Forrest & Leather (1998, p.38).

³⁹ <http://www.ilcuk.org.uk>

⁴⁰ Brenton (1998)

⁴¹ Planning Policy Statement 3: Housing, CLG (2007)

⁴² For example, various government initiatives include Code for Sustainable Homes, the Eco-Homes and Lifetime Homes Standards

⁴³ Elderflowers Project (2007, p.5)

⁴⁴ ONS Press Release (2007)

1.6 Policy Implications

An important policy implication of the 'staying put' agenda is that there are significant numbers of older people in the social and private rental sectors. For these populations, the choice of whether to 'stay put' or relocate cannot apply as it will be largely beyond their control. Publishing statistics such as 'three-quarters of households headed by a person aged 60 or more will own their homes in 2011' disguises this.⁴⁵ This potentially forces greater dependency on those already in the most vulnerable positions. It may also create social barriers between people who can and cannot pay for care, thus impacting negatively on initiatives to promote social cohesion.

It is also important to view this in light of wider government objectives that emphasise the positive contribution older people offer society.⁴⁶ The inconsistencies of government agendas is again presented by the fact that they prioritise those with higher care needs yet pressurise local authorities to implement preventative care services.⁴⁷ Bochel suggests the reason for these inconsistencies is that housing is a recent addition to policies for older people and that as yet, these ideas have not been translated into practice'.⁴⁸ This may explain why the government's approach is characterised by fragmentation and disorganisation. Such a position has negative repercussions for delivering the objective of holistic, 'transparent' services for communities.⁴⁹

Another policy implication of ageing in place is that the absence of diverse housing options for older people can perpetuate stigmas towards alternative living arrangements. After all, enabling people to remain 'at home' was developed as a policy response to sustained criticism towards sheltered housing.⁵⁰ Indeed, the decreasing popularity of sheltered housing schemes means that 'housing cutbacks are sometimes justified in terms of the alleged stigmatising effect that specialist housing and care schemes symbolise'.⁵¹ Although it is a commonsensical reflex to the short-comings of sheltered housing to focus on 'staying put', it is misleading to present this as providing housing choice to the older citizen since encouraging ageing in place to the detriment of the alternatives tends to *reduce* choice.

⁴⁵ Forrest & leather (1998, p.48)

⁴⁶ For example, National Strategy for Housing in an Ageing Society (Pre-Strategy Document), See Annex 1

⁴⁷ See Annex 1

⁴⁸ Bochel et al (1999, p.496)

⁴⁹ CLG (2006)

⁵⁰ Middleton 1981; Butler et al 1983; Wheeler 1988; Clapham & Smith 1990

⁵¹ Oldman & Quilgars (1999, p.369)

1.7 Concluding remarks

The problems produced by ageing in place are highlighted in this chapter. 'Staying put' is shown to impact negatively upon the individual, in terms of social exclusion and fuel poverty. Society in general is affected by the consequences of under-occupation, which also impacts negatively on sustainable housing agendas. The economic implications of 'staying put' are problematic in that this initiative appears to permit a marginalisation of older peoples' issues, in turn suggesting their significant contribution to the nation's wealth is being overlooked. Furthermore, policies supporting staying 'at home' are inconsistent with other government guidelines relating to sustainability and inclusive communities. Academic rationalisation of this policy position is that it enables reduced state spending, the consequences of which will strengthen the already-dominant conception that 'staying put' represents the best housing option for older citizens. It is crucial to realise though that older people may "behave differently if there were greater housing choices on offer".⁵² On the combined bases of this claim and the pessimistic account of 'staying put' detailed in this chapter, the next chapter will investigate how retirement communities can add to housing choice. How they respond to the economic, social and environmental concerns expressed in this review will also be revealed. The discussion will include an analysis of how such developments adhere to existing planning policies.

⁵² HOPDEV (2005, p.9)

CHAPTER TWO: ANALYSIS OF RETIREMENT VILLAGES

The first chapter argued that advancing the 'staying put' agenda was to some extent incompatible with efforts to secure mixed and sustainable communities, and also represented uneconomical use of housing. This chapter advances the debate by exploring the potential of retirement villages. Undoubtedly developing retirement villages would extend housing options; however, this section goes further than this in focusing on whether such developments should be endorsed on a national scale. To provide a clear comparative analysis between retirement villages and 'staying put', the challenges and opportunities faced by retirement village developments will be investigated in terms of their social, environmental and economic consequences. The extent to which retirement villages can coexist with adopted planning policies will be central to this discussion.

A key opportunity afforded by retirement communities is that they are able to provide economies of scale. The frequent inclusion of onsite medical facilities means that pressure on local social and medical care providers can be offset.⁵³ This centralising of care has the additional benefit of reducing the requirement for peripatetic carers: a practice that is not only environmentally unsustainable but also restrictive in terms of the number of hours that can be spent on caring. The economies of scale achievable in retirement villages can also play 'a significant role in promoting health and well-being'.⁵⁴ This is a combined result of care staff being on-hand to notice and act early on care requirements, and facilitating enhanced social relationships, which 'reduce the experience of social isolation, with consequent benefits to health, well-being and quality of life'.⁵⁵ The advantage of this situation is that it supports and enables the government to deliver its preventative care policies. This works to rebalance the trend towards prioritising those with the greatest needs to a system that is inclusive and unbiased.⁵⁶ There is a negative economic repercussion to this streamlining of services: it potentially reduces employment opportunities within the care sector. However this concern is partially offset by Croucher's argument that, 'retirement villages will be in the position to generate employment opportunities'.⁵⁷

A second way in which retirement villages create opportunities for improved economic viability is that in providing an alternative, they compensate for 'the failures of mainstream housing'.⁵⁸ They reduce the dependency on expensive Care and Repair schemes, whilst also enabling the release of larger residential units onto the housing market. This has a beneficial effect on housing supply *per se*, and also responds to the unmet demand amongst older home owners

⁵³ For example, 'the on-site care home at Hartrigg Oaks has saved local NHS in-patient services between £34,860 and £37,590 over a two-year period' (Croucher 2006, p.9)

⁵⁴ Ibid, p.10

⁵⁵ Ibid, p.11

⁵⁶ Refer to Figure 1.1

⁵⁷ Croucher (2006, p.16)

⁵⁸ Means & Smith (1998) in Bochel (1999, p.499)

to move.⁵⁹ In this way, retirement villages can capitalise on the economic opportunity presented by the 'grey pound'.

Retirement villages are criticised for elitism in providing a viable option only for those with significant funds to invest in care. This clearly impacts on social inclusive measures. However, this is an over-simplified assumption, indeed Croucher argues 'such perceptions are without foundation in the UK context'.⁶⁰ Many of the established retirement communities in Britain are run by charitable concerns or housing associations, which include tenants from social housing backgrounds.⁶¹ In recognising the economic power of the 'grey pound' retirement villages help to incorporate older people into society. This is a two-way process: collective action by residents increases the political voice and profile of older people, while barrier-free living enables them to participate in society to a greater extent.⁶² Since retirement developments include retail, leisure and health facilities that surrounding communities can also use, they offer a common-ground which facilitates social cohesion. Furthermore, the assumption that retirement communities complicate mixed community agendas is offset by statistics that there can be as much as a 40-year age span in these developments.⁶³

It follows that the heightened recognition retirement communities can give to older citizens will create opportunities for them to choose where and how they wish to live.⁶⁴ Furthermore, as the baby-boom generation is likely to be more assertive than previous generations, there is greater urgency to supply this choice.⁶⁵ Since relocating from the traditional home could also mean escaping the burden of dependency on relatives, there is a definite argument that moving into a retirement village could offer more independence than 'staying put'.⁶⁶ Tulle Winton supports this by highlighting the health benefits associated with relocating.⁶⁷

There are clear environmental advantages in relocating from the traditional home to a retirement community: it eases the problems caused by fuel poverty and poorly insulated homes, whilst also acting out government rhetoric that 'those [who] are vulnerable should not be left at home'.⁶⁸ In addressing the issue of under-occupancy retirement villages also represent 'a more sustainable form of provision'.⁶⁹ As noted in section 1.2 above, this is important as the prioritising of independence in recent years has obstructed the delivery of

⁵⁹ Forrest & Leather (1998, p.59)

⁶⁰ JRF (2006, p.39)

⁶¹ For example, Berryhill, Stoke-on-Trent and Ryfields, Warrington.

⁶² Croucher (2006, p.18)

⁶³ Croucher et al (2006, p. 68)

⁶⁴ 'While older people do not want to be bundled away to live in some labelled, specialist provision, some may actively choose a lifestyle that means living together with others of a similar age an inclination', Oldman (2003, p.53)

⁶⁵ Evandrou (1997) in Oldman (2003 p.56)

⁶⁶ Oldman & Quilgars (1999, p.376)

⁶⁷ Tulle Winton (1999) suggests that relocating to retirement housing is a 'deliberate stratagem to cope with the declining body', and therefore provides a way of resisting the ageing process and ensuring lasting well-being.

⁶⁸ Audit Commission (1998, p. 80)

⁶⁹ Clapham (1997, p.210)

sustainable housing for older people.⁷⁰ However, in using brownfield land, increasing residential densities and utilising sustainable construction and design, retirement villages do meet sustainable development standards, as well as maintain the independence associated with having 'your own front door'.⁷¹

Retirement communities provide a continuum in that they successfully bridge the divide between traditional residential care and 'staying put'. Unlike sheltered housing, they frequently offer mixed tenure options. This is an important progression on an individual level as it gives older people the choice to down-size yet maintain a stake in their homes. It is also a significant advancement in that mixed tenure schemes '[fit] effectively within the Government's choice agenda'.⁷² Another way in which retirement villages endorse existing policies is that they engage social care, housing, health and planning experts in discussion and development. As such they practice the political rhetoric of 'joint working, collaboration and joint commissioning': a feat that 'staying put' is apparently unable to achieve.⁷³

This brief discussion has shown that retirement villages can deliver independence, provide choice and maintain well-being for older people, by enabling them to retain their own front door, chose between different tenure options and become included in society. In so doing these developments realise the government's objectives for older people's housing. Moreover, retirement villages do this in a framework that avoids the various economical, environmental and social contentions incurred through 'staying put', as illustrated in the first chapter. It is therefore revealed that retirement village developments should be endorsed in policy and supplied in actuality. The next section of this report identifies three different cases of planning for older peoples' housing. The first two cases explore the social, environmental, policy and economic implications of various housing options for the elderly, including a retirement village, and examine how the planning system has sanctioned or impeded their development. The third case in particular advances the arguments in this section by investigating the social, economic, policy and environmental effects of an established retirement community.

⁷⁰ 'The image of shared housing has [...] suffered from the declining importance attached to the idea of communality and the growing emphasis on independent living', Cooper et al (1994, p.3)

⁷¹ Croucher et al (2006, p.56)

⁷² ExtraCare (2004)

⁷³ Bochel et al (1999, p.493)

CHAPTER THREE: CASE STUDIES

3.1 CASE STUDY 1: ELDERFLOWERS PROJECT, MILTON KEYNES.

Interviewees:

Carol Barac - Director, Elderflowers Project (23rd July 2007)

Paul Gibson - Housing Policy, Milton Keynes Council (25th July 2007)

Jane Hainstock - Social Care, Milton Keynes Council (6th August 2007)

Phil Mitchinson - Property Development Manager, Aragon Housing Association (3rd August 2007)

3.1.1 Site Details

The Elderflowers hypothesis presents a unique housing alternative since it seeks to provide bespoke housing for older people, for which care is not the central concern. This is partly based on the fact the model is targeting 'younger' old people and partly because national statistics prove people are staying healthier for longer.⁷⁴ The model seeks to encourage people from the age of 45, whether employed or retired, to down-size. The catalyst for this development project is that 'at least 50% of older households [have] more than two bedrooms above the bedroom standard'.⁷⁵ Accordingly, there is scope to provide more appropriate housing. Elderflowers housing would be available to social and mainstream market buyers and would include additional facilities such as health and social amenities, which the potential resident may not otherwise have the funds to access. The residents would own and manage these facilities through participation in a mandatory committee. The housing would be seamlessly integrated as part of wider mixed use development schemes, while the management structure and lack of care provided in-house, would offer a more affordable housing option than many retirement schemes. A suitable site to accommodate an Elderflowers development has get to be secured, however a development brief has been drafted.

Outline development brief⁷⁶

- Central (Milton Keynes)
- Close to transport links and a range of facilities
- A 'desirable location', for example, sited away from intrusive industrial activity or deprived neighbourhoods.
- Initial feasibility studies have been drafted on the basis of providing 200 units. This breaks down into the following: 20% 1-bed, 60% 2-bed, 10% 3-bed and 10% live/work. On this scenario, a total footprint of 18,828 sq m is required.
- Building heights between 4-6 storeys.

⁷⁴ 'The Office for National Statistics (ONS) now calculate the expected number of years in good health [...] In 2001, the expected number of years in good health was 67 years for men and 69 years for women', Elderflowers Project (2007, p.7)

⁷⁵ 'The "bedroom standard" is the number of bedroom that a household is calculated to need on the basis of household composition. Households [...] with two or more bedrooms above the standard are deemed to be under-occupying', Elderflowers Project (2007, p.14)

⁷⁶ Elderflowers Project (2006)

- Communal facilities include laundry, member's room and swimming pool. Where possible, these would be adjacent to other retail and leisure facilities.
- Commercial facilities comprise a therapy suite, convenience store and pub/restaurant.
- The development would fall into Use Class C3.⁷⁷ Therefore it would provide at least 30% affordable housing.⁷⁸ This 30% would be broken down into approximately 50% social rented and 50% shared ownership.
- Affordable housing units would be seamlessly "pepper-potted" throughout the development.
- Design and construction would be fully compliant with the Code for Sustainable Homes.
- There would be two resident's charges: one for the maintenance of the building and another for the cleaning and maintenance of the communal areas.
- Ownership would be outright in the general market housing provision

The policy, economic, social and environmental implications associated with an Elderflowers development are detailed below. Planning policy and national politics are dealt with in the 'policy implications' section.

3.1.2 Policy Implications

The population of people over 65 in the Milton Keynes area is lower than the national average.⁷⁹ Despite this, the Council has a proactive approach to housing the elderly.⁸⁰ The Council's preventative strategy for the impending "demographic bulge" is to support and encourage the development of extra care communities.⁸¹ To date, the 'strong demand for an extra-care village' has resulted in two such facilities in Milton Keynes.⁸²

The Council's housing department immediately took a negative stance towards the Elderflowers proposals as "they were thinking about care housing" and this ultimately conflicted with their extra-care agenda.⁸³ However, after further discussion "they could see that our model was entirely different [to extra-care] and that there was scope to provide both".⁸⁴ The gradual support for the Elderflower project may stem from the council's

⁷⁷ Use Class C3 is a dwelling house. The Town and Country Planning (General Permitted Development) (Amendment) (England) Order 2005

⁷⁸ Milton Keynes Council (2007, p.6) Affordable Housing SPD supports Policy H4 'Affordable Housing: Target and Site Threshold' in Milton Keynes Local Plan (2005) for 30% affordable housing.

⁷⁹ Milton Keynes Council, (2005a, p.8)

⁸⁰ The adopted 'Older People's Housing Strategy 2005-2008' is evidence of this.

⁸¹ Interview with Paul Gibson, Milton Keynes Council (25th July 2007)

⁸² Milton Keynes Council (2005a, p.11)

⁸³ Interview with Carol Barac, Elderflowers Project (23rd July 2007)

⁸⁴ Ibid

awareness of a tendency for older people to move out of Milton Keynes.⁸⁵ If this theory is correct then it shows that the council are at least reacting to demographic change and possibly trying to ensure an urban social mix for the future.

The Elderflowers project also sustained significant opposition from social care officers at Milton Keynes Council (MKC). This is because, as indicated above, MKC have adopted a vigorous approach to older peoples' housing in terms of funding the development of extra-care schemes. This specific approach has limited the council's responsiveness to other housing suggestions: a situation exacerbated by an over-stretched care budget.

It is important to note that social services representatives have been sceptical of the potential success of an Elderflowers development on the basis that it targets older people but does not include care facilities. The Elderflowers team responded to these criticisms by proposing that should in-house care become necessary, one of the residential units could be adapted to house care staff. This shows that the MKC have a limited perception of older people and this perception necessarily involves dependency and illness. Furthermore, this shows how an innovative development is hindered by out-dated and inappropriate conceptions of old age.

3.1.3 Economic Implications

A key strength of the Elderflowers proposal is that by targeting people from the age of 45, as well as including live/work units, the model emphasises and supports continued (economic) activity in older age. This supports active ageing policies set out in Government guidance.⁸⁶ This necessarily entails creating a stronger national economy. Furthermore, in endorsing relocation into smaller units, the model responds to national housing demand and supply. In providing more appropriate housing for older citizens who typically make up smaller family units, the Elderflowers model also incurs the economic benefit to the individual of avoiding fuel poverty.

The C3 use class status, and the minimising of service charges means that the Elderflowers model presents an affordable alternative to some retirement community schemes. The lack of care provision means that it would especially attract populations considering a move to the supported units of a retirement village development. The Elderflowers model also effectively addresses concerns over the economic viability of the Care and Repair initiative inasmuch as it illustrates how economies of scale can be realised for social and health amenities. The aim is that the residential charges would be lower than the Council Tax on family-sized properties. Therefore the Elderflowers model potentially reduces the threat of becoming income poor but equity rich in older age.

⁸⁵ A recent public consultation demonstrated that, 'only 24% of people thought that the provision of housing for older people was good or very good (with 50% describing housing provision as not so good and 26% describing it as not good at all)' Milton Keynes Council (2005a, p.11)

⁸⁶ Refer to Annex 1

3.1.4 Social Implications

Although the Elderflowers team “are not in the business of building social networks”, the management structure proposed and shared interest in communal areas means that there will be more likelihood of community-building in such a scheme than in a regular housing development.⁸⁷ These proposals therefore present an interesting opportunity to provide inclusive communities. Since Elderflowers housing will be implemented as part of wider mixed use housing schemes, and it will fall into the C3 use class, the model will create a mixed community in itself as well as contribute to a wider mixed community. In so doing, it avoids shortcomings such as social division and the image of institutional housing that are sometimes leveled at retirement community developments.⁸⁸ The fact that the scheme, at least initially, will not include care facilities helps to decouple age and frailty. This has the potential of sustaining the role older people play in society. The combination of no in-house care and the unique management structure would ensure resident fees were kept to a minimum, and therefore shows that residential developments for older people need not be exclusively available for wealthier populations

3.1.5 Environmental/Sustainable Implications

To date the Elderflowers Project have sought to be included in three separate housing developments in Milton Keynes. All of these sites have been centrally located, and in accordance with the key Joseph Rowntree Foundation criteria of being close to public transport, shops and churches. Two have also had ‘site specific attractive features’ such as pleasant outlooks, whereas the third was a brownfield site. The Joseph Rowntree Foundation guidelines particularly note parks as preferential locations for retirement community developments.⁸⁹

In promoting high-density living among older generations, as well as building to sustainable and energy efficient guidelines, in sustainable locations, the Elderflowers model supports PPS3 and the Code for Sustainable Homes. Furthermore, the model reinforces academic debate over the importance of relocating in ‘younger’ old age.⁹⁰ It also offers a solution to issue of under-occupancy in mainstream housing.

3.1.6 Concluding Remarks

The Elderflowers model shows how the economic contribution of older people can be sustained in accordance with active ageing principles, whilst also showing that age-specific

⁸⁷ Interview with Carol Barac, Elderflowers Project (23rd July 2007)

⁸⁸ Bochel et al (1999)

⁸⁹ JRF (2006, p.2)

⁹⁰ Brenton: ‘It is important to move while you still can to a place you chose before other people move you to a place they chose’ (1998:1). Forrest & Leather: ‘households headed by a person in their sixties are more likely to move than older households’ (1998, p.48)

development need not incur age-segregated communities. In targeting middle to old age people, it pre-empts under-occupancy to provide a continuum of housing options throughout later life. In so doing it enables these populations to avoid financial concerns associated with inappropriate housing. This study is particularly insightful in terms of showing how housing and care can and should be decoupled for older people and how local authorities' priorities can impede the delivery of housing choice for older people. It is significant that even when a council is anticipating housing problems associated with an ageing population, it can only adapt to one new housing proposal rather than multiple proposals which would truly provide choice for the older citizen. Clapham's call for, 'an urgent need for innovative thinking' is particularly pertinent to this debate.⁹¹

⁹¹ Clapham (1997, p.213)

3.2 CASE STUDY 2: FORMER HMS ROYAL ARTHUR, CORSHAM, NORTH WILTSHIRE.

Interviewees:

Paul Comerford – Head of Regeneration, WSP Group (Agent) (6th August 2007)

Colin Keene - North Wiltshire District Council – Housing Department (6th August 2007)

James Millard – North Wiltshire District Council – Planning Department (6th August 2007)

Tracy Gray – North Wiltshire District Council – Case Officer -Former HMS Royal Arthur (8th August 2007)

3.2.1 Site Details

The former HMS *Royal Arthur* is a c.10 hectare site, located 400 metres from a small residential settlement and approximately two miles from Corsham town centre. The Ministry of Defence site was used for military training until 1993. Since then, it has fallen victim to criminal activity. The buildings are dilapidated and any redevelopment of the site will necessarily entail the complete clearance of existing structures.

There has been a concerted effort in recent years to redevelop the site into a residential community for older people. The most recent application sought outline permission to develop a care village comprising a 72-bed care home, 80 extra-care apartments and 129 supported living units. The proposals included community facilities such as an activity centre, retail and administrative units, ancillary offices and 95-space covered car park. The application was refused and the case went to appeal. On the 9th November 2006 the appeal was dismissed. The landowner is now resubmitting a much-altered detailed application. This will provide a 64-bed care home with extra-care and supported living units supplied in “5 to 6 large buildings, between 2 and 3 storeys high”.⁹² The refused application proposed detached, two-storey housing; the new application however will offer older people high-density apartment living.⁹³

The policy, economic, social and environmental implications relating to the redevelopment of the Former HMS *Royal Arthur* site are detailed below. Planning policy and national politics are discussed in the ‘policy implications’ section.

3.2.2 Policy Implications

Research has shown that older people tend to move to more rural setting on retirement.⁹⁴ Regardless of this, the HMS *Royal Arthur* application and appeal were refused on the basis that the development would equate to new dwellings in the countryside.⁹⁵ However, this is a brownfield site and the application did not entail an increase to the pre-existing built footprint.

⁹² Interview with Paul Comerford WSP Group (6th August 2007)

⁹³ Refer to Annex 2 for full site details and planning history

⁹⁴ HOPDEV (2005, p.11)

⁹⁵ This conflicted with policy RH11 of the former North Wiltshire Local Plan 2001: ‘new dwellings in the countryside outside the physical limits or framework of a settlement [...] will not be permitted’, NWDC (2001, p.76). This document has now been superseded by North Wiltshire Local Plan 2011 (2006)

The topography of the site also meant that the low-rise structures proposed would not have a harmful visual effect.

The reasons for refusal have necessarily shaped the design of the renewed scheme. Importantly, these changes may reduce the independence of future residence should planning permission be granted. This is because in rejecting the C3 housing aspect (on the basis that it was contrary to the permitted use of the site), the council have necessitated the renewed design that is "much more institutional in design and feel".⁹⁶ The continuum of care that retirement communities aim to facilitate is thus lost to a scheme that must outwardly project care as a central and uniting factor. This action demonstrates how the local authority perceives age and frailty as being synonymous, which contradicts the independent living ethos. This conception of age then affects the nature of specialist housing bought forward.

In accordance with Planning Circular 11/95, the Secretary of State felt that planning conditions alone could not be used to restrict the occupancy age of residents, and a Section 106 agreement would be required to secure such matters.⁹⁷ As such an agreement had not been drafted, this created another reason to refuse the application. A similar situation occurred in an appeal for a retirement community development in Lytham.⁹⁸ In this case though the Inspector took a more lenient position, deferring her final decision to allow the applicant to respond to the proposals and draft a Section 106 accordingly. Considering the lengthiness of the planning and development processes, such flexibility could have been adopted in this case to ensure a supply of specialist housing for older people, especially since no other development proposals had been offered in relation to the site. The fact the council is also concerned about the in-migration of older people further suggests that housing for the elderly is a low priority for this authority.⁹⁹ This argument shows how the rigidity of a plan-led system hinders government ideals of preventative planning.

3.2.3 Economic Implications

The Local Planning Authority (LPA) overlook the amount and variety of employment generated by retirement community developments. Although it is recognised that the proposals would provide more jobs than other uses permitted under policy NE20, this is awarded little recognition.¹⁰⁰ This is interesting given that policy DP14 in the Structure Plan emphasises the need to strengthen the economy through diversification.¹⁰¹ Given that the retirement community proposal 'represents a new form of development which requires

⁹⁶ Interview with Paul Comerford. WSP Group (6th August 2007).

⁹⁷ CLG (2006c)

⁹⁸ Land adjoining Ballam Road/South Park, Lytham (PINS Ref: APP/M2325/A/06/2014169)

⁹⁹ Interview with Colin Keene, NWDC (6th August 2007)

¹⁰⁰ Policy NE20 'Re-use of military establishments in the countryside' permits B1 (Business), B2 (General Industry), B8 (Storage or Distribution), C1 (Hotel), D1 (Non-Residential Institutions) and D2 (Assembly or Leisure Facilities), NWDC (2006)

¹⁰¹ 'Particular emphasis' should be placed on 'accommodating new uses which diversify the local economy and provide jobs'. Wiltshire County Council & Swindon Borough Council (2006, p.69)

separate consideration', and that 'there would be an additional level of spending on goods and services, to the benefit of the local economy', there is a sound case for arguing the economic viability of this proposal.¹⁰² Its refusal may be further evidence that the power of the 'grey pound' is not being capitalised upon. The provision of a satellite surgery within the development means that improved economies of scale can be realised. There is no mention of the benefits for both future residence of the scheme and the surrounding neighbourhoods, so once again, the economic strengths of this proposal are apparently overlooked.

3.2.4 Social Implications

The lack of affordable housing was cited as another reason to refuse this scheme. North Wiltshire District Council (NWDC) and the Secretary of State took the view that the supported living units would fall into a C3 use class, rather than the C2 designation of the nursing and extra care units.¹⁰³ This represented a diversion from the adopted plan and the Certificate of Lawfulness relating to the site.¹⁰⁴ Accordingly, the scheme has been redesigned so that all units, regardless of the level of care needed by the resident, will be situated in large, C2 style buildings. As stated in section 3.2.1, this conflicts with government ideals for independence. It also serves to discourage 'younger' old people from entering such developments as they will not associate themselves with the level of care provided. This reduces housing choice and the age mix such developments can attract. Had the council permitted C3 use on the site, they would have been able to demand affordable housing provision and thus establish a more diverse community. Refusing the C3 aspect of the proposal and enforcing the C2 without appropriate planning conditions, could create a development exclusively for wealthier older people, inasmuch as an affordable housing percentage will not necessarily be enforceable. The relative dislocation of the site from neighbouring communities, alongside the in-migration of older, wealthier citizens, heightens the need for the redevelopment of this site to incorporate existing residents, from diverse economic backgrounds.

NWDC planning department anticipate retirement community developments will mainly take place in urban centres: as James Millard put it "Chippenham is the largest town and we are expecting the greatest influx of older people there".¹⁰⁵ This does not provide choice for older citizens who wish to relocate to rural surroundings.

¹⁰² PINS (2006, p.5)

¹⁰³ Use Class C2 to refers to Residential Institutions, The Town and Country Planning (General Permitted Development) (Amendment) (England) Order 2005

¹⁰⁴ Thus contrary to Section 38(6) of the Planning and Compulsory Purchase Order Act (2004). The Certificate of Lawfulness permitted C2 use.

¹⁰⁵ Interview with James Millard, North Wiltshire District Council (6th August 2007)

3.2.5 Environmental/Sustainable Implications

On environmental grounds, a retirement community is arguably the most suitable use of this site. Indeed, Secretary of State agreed with the appellant that the proposals demonstrate a beneficial use of a brownfield site.¹⁰⁶ However, the LPA and Secretary of State also stated that the proposal conflicted with then PPG3 in that development outside urban areas should use the 'most sustainable option'.¹⁰⁷ What constitutes 'the most sustainable option' is clearly open to interpretation: in this case, B1, B2 and B8 uses can be sustained by the existing infrastructure.¹⁰⁸ Alternatively, proposals which produce a minimal amount of travel will also be sustainable. Especially considering the rural, low-density residential nature of the surrounding land, a retirement community would represent a more sustainable use than an intrusive industrial use.¹⁰⁹ In arguing that the proposals do not adhere to sustainable transport policies due to the age of targeted residents, the Secretary of State and LPA are continuing to couple older age and frailty.¹¹⁰ Grouping older peoples' housing in retirement communities in fact presents a highly sustainable development model. The satellite doctor's surgery and onsite retail units contribute to this argument. Responding to the Inspector's comments, the renewed scheme includes a green travel plan. An 'on-demand' mini-bus service, "cycle and footpaths for more able-bodied members", and car club are proposed in this document.¹¹¹ This shows the ability of such developments to react to environmental concerns.

3.2.6 Concluding Remarks

This case study provides an interesting insight into the development procedure for a retirement community. It demonstrates the rigidity of the plan-led planning system in disallowing residential development on designated employment land, regardless of the employment capacity of the residential development. This suggests that neither the economic contributions of older people, retirement communities or the benefits of economies of scale are recognised by the LPA. The inflexibility of the planning system in this case and the negative implications this is seen to have on the delivery of specialist housing for the elderly, shows the problems of implementing preventative planning measures. Furthermore, this system is seen to govern the type of housing developed, yet the provision of institutional-style housing may not accurately reflect what older people want. This, as well as the council's focus on urban centres for the provision of housing for older people, shows how options are limited for the older consumer. It is particularly interesting that the council disallow the supportive housing elements to this proposal as this suggests that housing for older people is

¹⁰⁶ PINS (2006, p.4)

¹⁰⁷ CLG (2006c, p.4)

¹⁰⁸ Use Class B1 (Business), B2 (General Industry) and B8 (Storage or Distribution), The Town and Country Planning (General Permitted Development) (Amendment) (England) Order 2005

¹⁰⁹ Indeed, it is noted that the uses permitted would 'generate relatively large numbers of HGV movements, leading to noise, hazard and air pollution and would be unlikely to result in an aesthetically pleasing development' PINS (2006, p.4)

¹¹⁰ Planning Policy Guidance 13: Transport, ODPM (2001)

¹¹¹ Interview with Paul Comerford, WSP Group (6th August 2007).

still bound up in care narratives. Finally, it is important to highlight how the private sector is almost doggedly pursuing the development of housing for older people, despite public sector inactivity in this area.

3.3 CASE STUDY 3: BERRYHILL RETIREMENT VILLAGE, STOKE-ON-TRENT

Interviewees:

Mike Randall – ExtraCare Trust (15th August 2007)

Kelly Stone – Housing Options Division, Stoke-on-Trent City Council (16th August 2007)

Margaret Yates – Planning Policy and Strategy, Stoke-on-Trent City Council (16th August 2007)

Pauline Devall – Supporting People Team, Stoke-on-Trent City Council (17th August 2007)

Sheila Weightman – Manager, Berryhill retirement village (17th August 2007)

3.3.1 Site Details

Berryhill was opened in 1999 as the first ExtraCare village of its type in England. The village is located approx. 2.5 km from Stoke City Centre, in residential suburb of Bentilee. The village is a joint partnership between Touchstone Housing, now Midland Heart, and ExtraCare Charitable Trust. It offers 148 one and two bed flats, all of which have their own kitchen, bathroom and living room. Berryhill is home to 180 people over 65 years old. Communal facilities are located on the 'main street' and include a restaurant, shop, hairdressers, library, café/bar, ATM, IT and craft rooms, laundry, serviced gym and village hall. There is also a consultation room for locum doctors. All the residents are from the surrounding area and are selected to become residences by a panel made up of members of the Council's housing department, social services department and Midland Heart representatives. Women outnumber men on a ratio of 2:1 and the mean age is between 75 and 76. The entire 'village' is under one roof, is two storeys high and all residential units have views over the Berryhill Fields nature reserve.¹¹² Berryhill's staff provide a wealth of services for residents, including a 24-hour care service, such as bed-turning during the night and errand running, such as collecting prescriptions. The ethos is that all residents should be able to participate in two activities of their choice each day and therefore there are many in-house clubs as well as organised excursions which involve residents from other ExtraCare communities in the region.

The policy, economic, social and environmental implications relating to Berryhill retirement village are detailed below. Planning policy and national politics are dealt with in the 'policy implications' section.

3.3.2 Policy Implications

The expiration date of the adopted Stoke City Plan was 2001. However, due to the Planning and Compulsory Order Act (2004), the document has been kept 'live', despite many of its policies now being irrelevant. In the absence of an up-to-date local plan, planning applications are often decided using the relevant structure plan.¹¹³ However, this plan only includes generic policies for residential developments to include specialist housing.¹¹⁴ Despite the

¹¹² In accordance with guidelines set out in Joseph Rowntree Foundation recommendations, JRF (2006, p.2)

¹¹³ Adopted Staffordshire and Stoke-on-Trent Plan 1999-2011 (2001)

¹¹⁴ Policy H4 'Portfolio of Sites'. Adopted Staffordshire and Stoke-on-Trent Plan 1999-2011. (2001, p.69)

absence of policies, developments like Berryhill have alerted housing officials to the potential of this form of provision and the Supporting People team have implemented a 'five-year strategy' which proposes the (re)development of facilities to provide additional extra-care schemes.¹¹⁵ This strategy supports guidance set out in the draft West Midlands Regional Spatial Strategy (WMRSS).¹¹⁶ The WMRSS also highlights the particular problem of under-occupancy in the social renting sector, and demonstrates the positive effects retirement communities have in alleviating this. This issue is explored in detail in the 'Economic Implications' section. In supporting additional developments like Berryhill, the authorities are reacting to demographic change to ensure future urban social mix.¹¹⁷

3.3.3 Economic Implications

The Village presently provides 37 full and part-time jobs. These roles range from housekeeping, catering, administration, and caring. There is also a well-being nurse and trainer/gym supervisor. All building maintenance is undertaken by Midland Heart, which provides additional employment. Similar to the proposed set-up of the Elderflowers model, costs are kept to a minimum through resident participation. Berryhill offers less employment opportunities than succeeding ExtraCare retirement villages have as it does not have an on-site nursing home.

In 2000-01 the Bentilee area 'was classified among the worst 15% nationally on Multiple Deprivation Rank'.¹¹⁸ The Berryhill development has had a positive effect on the local economy by providing additional retail opportunities through its commercial facilities. Although these facilities are located within the development, they are not exclusive to the residents and are well used by the surrounding community. Due to the charitable nature of the scheme, the commercial facilities are not supposed to make a substantial profit. However, the profits created are repaid into the ExtraCare housing budget and used to support this and other retirement village developments.

The Berryhill development has also had a positive effect on the regional economy though enabling older people to down-size from their former homes, thus responding to the concerns of under-occupancy. This is especially important given that the WMRSS states,

'mismatches in the social rented sector between the type of housing available and the households occupying and needing the housing, need to be addressed as a matter of urgency'.¹¹⁹

¹¹⁵ 'There is a need to review [existing options] and consider options for remodelling, this might include [redesigning] the schemes to an extra care model' Stoke-on-Trent City Council (2005, p.19)

¹¹⁶ This document calls for an 'increased provision of good quality accommodation for sale and rent that meets the needs of older people', West Midlands Regional Spatial Strategy- Final Draft for RHB 22nd June 2005, p.18

¹¹⁷ The WMRSS notes that the population of Stoke has fallen over the passed two decades, 'and is predicted to fall [...] over the next 20 years', Ibid, p.56

¹¹⁸ North Stoke PCT (2003) in Bernard (2004, p.24)

¹¹⁹ West Midlands Regional Spatial Strategy- Final Draft for RHB 22nd June 2005 p.18

Down-sizing has been ensured by the fact 144 out of 148 apartments are one bed units. There is a considerable amount of council-run housing in the Bentilee area and therefore, the selection of residents from council housing lists has enabled a more suitable fit in terms of housing stock and occupiers.¹²⁰ This also has positive implications on sustainable development grounds.

Although between 70-80% of the Berryhill residents are in receipt of housing benefits, the scheme is economically sustainable. This is because rent, in either case, is subsidised by the local authority, whereas utility charges payable by the residents are reduced as a combined result of smaller living units and fuel charges that are based on commercial rather than domestic rates. The third fee which relates to the use of facilities is minimal, for example 50 pence to use the fully-equipped gym. This allows the residents more 'spare change' and thus greater consumer power.

3.3.4 Social implications

As indicated in section 3.3.3, Berryhill is a deprived area of Stoke-on-Trent and this often involves negative repercussions on citizens' health status.¹²¹ However, research undertaken by Keele University has shown that on average the health and well-being of the residents improved on entering the scheme and that these improvements were sustained.¹²² The low health standard of the area however, may have harmful effects on the long-term success of the village. Firstly, it may create an imbalanced community in terms of health and age, and secondly, this imbalance could damage the perception people have of the scheme. For example, residents in a nearby sheltered housing development felt that Berryhill was 'somewhere to go when one could no longer manage'.¹²³ Its perceived 'hospitalised' appearance may also stigmatise care.¹²⁴

ExtraCare operate on the basis that activity and engagement in community life are essential to both quality of life and well-being. Indeed, the health benefits highlighted above are seen as a result of 'getting involved' and the self-confidence this enables.¹²⁵ To maintain a sense of community and self-direction, the café/bar, shop, library and reception are all run by the residents. This automatically enhances security and community spirit whilst also minimising the cost of running the scheme, and providing formal surveillance.

¹²⁰ According to the profile of the North region, in the WMRSS- Final Draft for RHB 22nd June 2005, p.56

¹²¹ In 2000-01, local life expectancy was 73.2 for men and 78.1 for women, compared to a national average of 75.2 for men and 80.1 for women. Bernard, (2004, p.24)

¹²² Ibid, p.24

¹²³ Ibid p.25

¹²⁴ Ibid p.25

¹²⁵ ExtraCare (2004)

Although the entry selection process ensures there is a mix of age and disability within the scheme at any one time, the fact remains that there are twice the number of women than men in the scheme, and these residents are 'predominantly working-class' and 'exclusively White'.¹²⁶ This clearly poses issues for sustainable and inclusive community discourses. However, ExtraCare spokesperson, Mike Randall, does not perceive this as a problem, considering that the demographic structure of the scheme is a 'true reflection' of the Bentilee community.¹²⁷

The social benefits of Berryhill retirement village on the wider community are that volunteering is an important part of village life.¹²⁸ Not only do residents provide informal assistance to friends and neighbours within the complex, there is also a two-way volunteer process between residents and the wider community, with the nearby primary and secondary schools being particularly involved.¹²⁹ Berryhill was the first ExtraCare village to include extensive community facilities alongside a comprehensive care package. Since its opening, ExtraCare have refined their development strategy and all their modern villages include a nursing facility and provide mixed tenure options. Discussions are in progress as to whether Berryhill should be adapted to offer these services.

3.3.5 Environmental/Sustainable Implications

This retirement village was built to wheelchair design standards in 1998. Although the development was built before the Code for Sustainable Homes was in place, the building is extensively insulated.¹³⁰ Energy-saving measures are also being implemented such as installing movement-activated lighting, using low-energy bulbs. The high-density living arrangements and compact one and two-bed apartments also adhere to housing objectives set out in PPS3. As mentioned above, the fact that moving into the scheme meant down-sizing for many residences also produces positive environmental implications. Furthermore, the location of the village is sustainable inasmuch as it used brownfield land, which required major remediation. ExtraCare have worked with the local transport suppliers to provide an additional bus stop to serve residence. A frequent bus service into central Stoke-on-Trent is now available from outside the main entrance of the building. This is clearly in accordance with PPG13 and guidelines set out in the draft WMRSS.¹³¹

¹²⁶ Ibid (2004), Bernard, M. (2004, p.50)

¹²⁷ Interview with Mike Randall, ExtraCare Charitable Trust (15th August 2007)

¹²⁸ Interview with Sheila Weightman, Berryhill Retirement Village (17th August 2007)

¹²⁹ Ibid

¹³⁰ Refer to Annex 1

¹³¹ ODPM (2001), 'To meet the needs of vulnerable older households, new development should provide good access to public transport', West Midlands Regional Spatial Strategy- Final Draft for RHB 22nd June 2005, p.19

3.3.6 Concluding remarks

This case study shows the positive social and economic effects retirement villages do provide. It demonstrates how the government agendas of active ageing, social inclusion and sustainable development can be met, at the same time as combating the economic concern of under-occupancy. This study particularly highlights how residents in age-specific development can still be involved within society through volunteer programmes. The importance of design and location are also illustrated inasmuch as ExtraCare have pre-empted the social and environmental requirements of its residents. It is noteworthy that ExtraCare have provided this despite little to no specific policy directives from the local authority, and that the local authority are in fact developing their strategies as a response to what public sector development has achieved. It is important however to realise that care and housing are still combined in ExtraCare developments.

3.4 CASE STUDY OVERVIEW

This chapter provides an overview of the issues raised by the three case studies undertaken in this study. It highlights the common trends between the cases as well as demonstrating how each case differs from the next in terms of the approach adopted and responses elicited. Since the three cases were chosen to portray varying options to remaining in the traditional home, they will be assessed in light of this comparison. This chapter will serve to support the policy recommendations made in the concluding chapter.

All three case studies demonstrate how alternatives to 'staying put' can produce positive social effects, both for the individual and for society. They all show how age-specific development need not necessarily result in age-segregated communities. The Elderflowers model, in proposing to be implemented as part of housing developments for all ages, tackles the problem of social exclusion among older citizens particularly effectively. The Elderflowers and Berryhill studies combine to counter claims that retirement communities are expensive schemes, which exclude people on economic grounds. However, the HMS *Royal Arthur* case serves to complicate this position. This study reveals that the planning system, in rejecting C3 style housing and thus the mandatory provision of affordable housing, may inadvertently produce a retirement housing development that does mainly attract wealthier populations. The site specific characteristics of this case may further promote social severance.

The case studies combine to demonstrate that 'staying put' is the least sustainable housing option for older people. This is because all the studies show a more suitable match between house-size and number of occupants, which has positive implications for energy consumption. It also enables larger families to inhabit the existing stock of family-size houses. The economies of scale achievable by grouping people with similar housing and care needs together also presents a more sustainable solution than peripatetic carers working on traditional home-care models. The fact that modern and specifically-designed housing will better fit the needs of their older occupiers also presents a more sustainable solution than 'staying put' in terms of preventing health problems caused by insufficient heating and falls. As shown by all the case studies, economies of scale in terms of providing additional facilities for doctors, leisure and retail amenities, has social and economic benefits that extend to residents in neighbouring communities. Whereas the Elderflowers hypothesis only shows how an older workforce can be put to use for the good of their specific development, the Berryhill case shows that older people can carry out roles that not only provide a purpose and structure for the individual, but also benefit the community. It is important to note the inclusion of leisure and social facilities in all three cases. This demonstrates an awareness of the need to make the alternatives to 'staying put' as attractive as possible in order to entice older people out of their traditional homes.

All the cases aim to provide a continuum of care. In the Elderflower case, appropriate housing is sought before the onset of care requirements, whereas ExtraCare support people with care needs of varying severity. The refused HMS *Royal Arthur* proposals sought to pre-empt care through the supported housing units, as well as provide for moderate and severe care requirements through extra-care and nursing care beds. This shows that increasingly, housing is being acknowledged for its ability to prevent care needs. This move will be welcomed by academics such as Forrest and Leather who argue that, 'more [people] are likely to seek dwellings [...] with high standards of accessibility, security and services to deal with repair and maintenance'.¹³²

In anticipating the need for specialised housing, that does not necessarily include care, the Elderflowers and HMS *Royal Arthur* cases demonstrate the appropriateness of decoupling care and housing. The fact neither of these cases have reached the development stage could be used to argue that local authorities are not advancing their strategies for older people at the same rate as the private sector. Indeed, James Millard acknowledged that even in the emerging NWDC Core Strategy, older peoples' housing and care needs are "still very much combined".¹³³ Carol Barac suggests this is because "housing for older people is dominated by people coming from a social care background".¹³⁴ This position is also given weight in academic research which has highlighted that housing is a relatively new consideration in policies for older people.¹³⁵

The HMS *Royal Arthur* case adds to this discussion in displaying the low priority housing the elderly appears to hold in local authority agendas. The prioritisation of employment uses over residential highlights the difficulties in securing housing that prevents or delays health concerns, which the lengthiness of planning and development processes only serve to exacerbate. The HMS *Royal Arthur* case study suggest that local planning authorities may not be taking housing shortages for older people seriously, nor looking at providing real alternatives to 'staying put'. The local authorities in the Berryhill study show a more favourable approach to housing options for the elderly, whereas in the Elderflowers study, the progression of one alternative - extra care - appears to limit the support for other options. It is crucial to note that all the cases are proposed and implemented by charitable or private sector organisations, and that these bodies are ensuring desirable locations are secured for older peoples' housing. The Berryhill and HMS *Royal Arthur* projects also show that design and outward appearance are vital considerations.

Despite public sector inaction in this domain, the importance of public/private sector collaboration is nevertheless highlighted throughout these studies. The Supporting People

¹³² Forrest & Leather. (1998, p.58)

¹³³ Interview with James Millard, North Wiltshire District Council (6th August 2007)

¹³⁴ Interview with Carol Barac, Elderflowers Project Co. Ltd (3rd July 2007)

¹³⁵ Bochel et al (1999)

strategy for further extra-care developments in the Stoke-on-Trent case is no doubt a reflection of the support the authorities have for existing villages like Berryhill. The HMS *Royal Arthur* case also highlights this point as the development team are "dealing with the Council this time" and have received positive feedback on the resubmission proposals.¹³⁶ Interestingly, in the Elderflowers case, miscommunication of what the scheme would involve between the company and the council is thought to be the reason why the scheme was not included in the Campbell Park redevelopment.

¹³⁶ Interview with Paul Comerford, WSP Group (6th August 2007)

CHAPTER FOUR: CONCLUSION

This research project has examined the housing options available to older people. Initially research was undertaken to determine the direction of government guidance in this arena.¹³⁷ Having established that the official preference for housing older people equated to their 'staying put', further research was warranted to discover whether this was in fact the most appropriate housing option. The review undertaken in the first chapter highlights the policy, social, environmental and economic concerns relating to 'staying put'. Chapter two advanced the discussion by providing an overview of the ways in which retirement communities could provide an alternative housing option for older people.

In the third chapter, three varying housing options were investigated. The first study highlighted the difficulty of securing appropriate sites and local authority support. The second looked into the application and appeal stages to show how policies shape development, while the last case study focused on an established retirement village. Although the housing options researched in the latter two case studies are not vastly dissimilar, the development phases they present are. The latter case study portrays the realised benefits of retirement communities, and the former demonstrates how, almost a decade later, achieving planning permission for such developments is still fraught with difficulties. Importantly then, local authority perceptions of retirement communities do not appear to have progressed a great deal in ten years.

The conclusions this study reaches are that although the British planning system is 'plan-led', there are no specific plans for older peoples' housing. Furthermore, despite acknowledging the impending influx of older people in our society, the system is failing to respond to the specific housing needs this entails, regardless of the system overhaul facilitated by the Planning and Compulsory Order Act (2004). Even though it is shown that policies are beginning to include an awareness of older peoples' housing needs, it is also demonstrated that the planning system is not being used to enforce this. The case studies indicate that in recent years, private and charitable firms have predominantly delivered progress and housing choice for older populations. Whereas it is true they would not have been able to achieve this without the consent of local and regional planning bodies, there is little indication that had private and charitable organisations not taken this lead, public sector advancements would have filled the void.

It is perhaps unfeasible to recommend the introduction of policies specifically targeting this type of development, especially in light of recent high-profile reviews demonstrating the need to streamline the planning process.¹³⁸ However, there may still be capacity to promote more housing options for the elderly, including retirement villages, without necessarily creating more policies. For example, housing for older people could be incorporated into the permitted

¹³⁷ The evidence of this research is contained in Annex 1

¹³⁸ Barker (2006)

uses listed in site specific policy documents. This would ease the pressure on development companies to source appropriate land, which would reduce the time taken to deliver appropriate supplies. This suggests that suitable housing supply for older people would benefit from cross-sectoral and collaborative approaches from the private and public sector. Indeed, the research on Berryhill retirement village illustrated that there was an improvement in provision where these two bodies were open and responsive. This idea is supported by the Elderflowers case where the impediments to development stem from the council adopting a proactive, yet limited perspective on housing older populations.

It is likely that the planning system and the development of comprehensive and specialist housing cannot alone induce older people to leave their long-term homes. Therefore, policy-makers may also need to disincentivise 'staying put'. This would be possible by curbing housing benefits for single occupants or raising the eligibility threshold for such benefits. Since this would in effect represent a u-turn in guidance, the government are likely to be wary of taking such a course of action.

Another important lesson to draw from this research is that the economic contributions of older people are often not accounted for in planning services, including housing. This has harmful effects on the individual as well as the economy as older people are revealed to hold a substantial percentage of UK property equity. This study suggests that policy-makers still understand older age as synonymous with disability and this offers one explanation for why older people are still overlooked in capitalist society. It gives further weight to the idea that policy-makers, and therefore the public sector, are not advancing assumptions of older people in line with social changes, such as improving life expectancy, growing financial security and higher life expectations in older age. Matters are further complicated by the fact that when specialist housing is developed for older people, it can exclude poorer populations.¹³⁹ However, it is demonstrated in this research that if supported coherently by planning measures, retirement communities can deliver economically and socially inclusive developments.

Throughout this study it has been demonstrated that 'staying put' conflicts with social and environmental agendas, especially in terms of ensuring sustainable development and inclusive communities. It is subsequently revealed that retirement community developments, in using brownfield land, increasing residential densities and utilising modern construction and design techniques, are better placed to avoid these complications. In so doing these developments present fewer policy contradictions and should, in theory, incur fewer restrictions in achieving planning permission. If signs of social breakdown cannot alone provide a catalyst for reconsidering how to integrate older people, then perhaps the global

¹³⁹ Croucher (2006) It is revealed in this study that only 25% of the retired population would be able to afford living in Hartrigg Oaks Retirement Community

importance of securing environmentally sustainable development can. These factors, combined with the economic opportunities latent in older populations, surely demonstrate why the government and public sector policy-makers must address housing options for the elderly as a matter of urgency.

10, 785 words

MATRIX OF KEY INITIATIVES ON HEALTH, SOCIAL CARE AND HOUSING FOR OLDER PEOPLE

Title	Publisher: date	Scope of Initiative
Better Government for Older People (BGOP)	HM Government: 1998	BGOP was set up in 1998 to managed regional projects aimed at including older people. BGOP was later extended into a network of voluntary organisations, health agencies and local authorities to provide best practice guidance. Issues such as regeneration, cost efficiency and race relations are the BGOP Networks concerns. BGOP funds the Older Peoples' Advisory Group (OPAG), which acts as the direct voice of older people in responding to local and central government initiatives
Better Care, Higher Standards (BCHS)	DoH/DETR: 1999	Set out a National Charter for LA's and Health Services to agree to publish Local Charters by June 2000 on access to information; partnership working; prioritizing needs; standards to expect and targets to meet.
National Service Framework for older People	DoH: 2001	Standards for improving services in 8 areas: 1) Combating age discrimination 2) Person-centred care 3) Intermediate Care 4) General Hospital Care 5) Strokes 6) Falls 7) Mental health 8) Promotion of health and active care
Quality and Choice for Older People's Housing - A Strategic Framework	DoH/ DETR: 2001	Five key areas developed: 1) <u>Information and advice</u> <ul style="list-style-type: none"> ▪ Care Direct - access to information for older people and carers on housing, social security, health and social care. 2) <u>Diversity and Choice</u> <ul style="list-style-type: none"> ▪ Evaluation of vulnerable peoples' needs following Housing Green Paper ▪ Guidance for care delivery for BAME elders 3) <u>Flexible Service Provision</u> <ul style="list-style-type: none"> ▪ 50% more people using community equipment, such as 'tele-care' services by 2004 ▪ flexible approach to home improvements and equity release ▪ DETR/DH guidance on providing a more holistic approach to both remaining in the move and moving on 4) <u>Quality</u> <ul style="list-style-type: none"> ▪ More help to private sector in poor housing

<p>Quality and Choice for Older People's Housing: The Story so far</p>	<p>DH/ODPM: November 2002</p>	<ul style="list-style-type: none"> ▪ Proposals to replace Housing Fitness Standards with Housing Health and Safety Rating system. ▪ Set up Charter of Social Housing, inspected by older people ▪ Support development of BCHS charters ▪ Supporting People to be effective from 2003 <p>5) <u>Joint Working</u></p> <ul style="list-style-type: none"> ▪ Circulate good practice from Beacon Council scheme ▪ Key Potential joint training approach as part of Modernising Services agenda
<p>Quality and Choice for Older People's Housing: The Story so far</p>	<p>DH/ODPM: November 2002</p>	<p>An update on progress made to date, especially in relation to HOPDEV's work.</p> <p>1) <u>Information and Advice</u></p> <ul style="list-style-type: none"> ▪ Extension of Care Direct Pilots leading to a Third Way Service ▪ Section of ODPM website is dedicated to HOPDEV, including health and housing information, with links to external bodies such as the DH ▪ Funding for Elderly Accommodation Council and Care & Repair England through the Special Grants Programme to improve advice services for older people, their carers and families <p>2) <u>Diversity and Choice</u></p> <ul style="list-style-type: none"> ▪ Choice-based lettings for sheltered housing by listing vacancies on internet. Following Housing Green Paper (DTLR:2000), DTLR released £13 Million to LA's and their partner RSL's to source new means of meeting the requirements of potential and existing social tenants, to include more choice and better accessibility to housing options. ▪ BAME elders Action Plan (HOPDEV programme) ▪ 'From Lip Service to Real Service' published as guidance for LA housing strategies for BAME elders ▪ 'Owning Independence in Retirement' McCarthy & Stone report calling for Planning Departments to adopt a positive view on private sheltered housing so that it may become a viable housing option for elderly people, especially older home-owners. <p>3) <u>Flexible Service Provision</u></p> <ul style="list-style-type: none"> ▪ Integrated Community Equipment Service (ICES) project (November 2001) to prepare action plan to meet NHS targets ▪ Regulatory Reform (Housing Assistance) (England and Wales) Order - Relaxation of regulation directing LA's as to how and where they award housing renewal assistance. Provision of preferential rates, and interest-free loans, including equity-release

		<p>products. Even enabled LA's to assist in purchasing another property when this represented a better option than undertaking adaptations</p> <ul style="list-style-type: none"> ▪ 'Living Independently in Retirement' McCarthy & Stone ▪ Emerging Role of Sheltered Housing (EroSH) – the National Consortium for Sheltered Housing promotes all forms of sheltered housing. Includes joint workin between sheltered housing and retirement housing staff. Centre for Sheltered Housing Studies (CSHS) set up training courses for those employed in sheltered housing schemes. CSHS published 'Code of Practice for Sheltered Housing in 2001, which benchmarks of best practice and delivery of sheltered housing. (Assisted in preparation of Supporting People). ▪ Supporting People – Housing and support options for older people' opened a debate on the range of housing options for older people including support services <p>4) <u>Quality</u></p> <ul style="list-style-type: none"> ▪ Relaxation of regulations means better access to private sector renewal ▪ Development of Housing Health and Safety Rating System (HHSRS) ▪ Anchor Senior Living Charter project – focus group meeting in 2002 to locate key concerns of old people. Moving towards a toolkit to assess selection of housing stock and tenures ▪ Updating 1999 document 'Towards a Common Currency' to provide a plain language glossary of terms ▪ BCHS – most charters now in place. ODPMDH review (2002) to identify good practice models and scope for development ▪ Supporting People – Core Monitoring Review Group (2002) <p>5) <u>Joint Working</u></p> <ul style="list-style-type: none"> ▪ Continuation of the Beacon Council scheme (One of the 2001/02 guiding themes was 'Supporting Independent Living for Older People'). ▪ LGA 'Performance Finder Initiative' set up six performance indicators to assess Local Government commitment to local communities, one of which was 'Helping older people live independent lives'. Successful LA's became 'pathfinders' for Central Government policies. Stockton-on-Tees BC became a 'pathfinder' for streamlining the housing adaptation service. North Kesteven DC became a 'pathfinder' for promoting independence.
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		<ul style="list-style-type: none"> ▪ Independent Living Network - role was to 1) circulate various approaches to enabling independence and 2) assist joint working across functional, organizational and professional bodies ▪ White Paper 'Strong Local Leadership – Quality Public Services' (DTLR: 2001) insists on a clarity of approach for services and information ▪ Key Potential renamed Housing Potential, delivered 'Housing potential, Training Together' report (2001) to promote collaborative working of all National Training Organisations for Housing (NTO) ▪ ODPM/DH Joint Guidance on Adaptations – set out the role and responsibilities of those involved in the delivery of adaptations and Disables Facilities Grants. ▪ Building Capacity and Partnership in Care (DH: 2001) forms an agreement between statutory and independent social care, healthcare and housing sectors to provide an inclusive approach to planning service provision ▪ Single Assessment Process (SAP) – BCHS charters is used in referring people to housing agencies to upkeep standards. ▪ Health Act flexibilities – pooling resources so that expenditure is allocated on needs basis; delegation of role and responsibilities between authorities to provide a holistic approach to service delivery; Care Trusts to take on functions of NHS, LA health and social care to produce a new and flexible approach
<p>Preparing Older Peoples' Strategies</p>	<p>DoH/ODPM/ Housing Corporation: February 2003</p>	<p>Nine recommendations include:</p> <ol style="list-style-type: none"> 1) Creating a dynamic strategy, underpinned by a popular vision 2) Linking housing strategies with health and safety agendas 3) Developing combined advice, information and assessment systems 4) Rebalance specialist accommodation and housing system to fit needs of present and future users 5) Improving quality and speed of housing delivery – 'what is being done to capitalize on the potential afforded by planning guidance PPG3 to promote the housing market for older people?' (p68) 6) Integrating services at the local level. I.e can housing issues tie in with each NSF Standard? Calls for an examination in to the potential for sheltered housing and extra care housing to play a community support role for vulnerable older people in the area 7) Tackling the difficulties of reaching BAME elders and disabled populations (akin to 'Quality and Choice' diversity agenda. 8) Reducing poor quality homes, creating national standards of quality rather

National Minimum Standards (in relation to Care Standards Act 2000)	DoH:2003	<p>than postcode lotteries and aiming towards Lifetime Homes Standards</p> <p>9) A cross-sectoral housing strategy that support and is supported by broader social and health services, as well as quality of life agendas</p> <p>Set of guidelines for services in care for older people, to include care homes and domiciliary care.</p> <p>The National Minimum Standards for care homes (revised 2004) focuses on standardising high quality in care choice, treatment, management and the physical environment, such as new regulations on room sizes. A service user plan is drawn up for each user, in response to their specific care needs and the care home is contractually bound to fulfill these requirements. Contact with the wider community is also encouraged.</p> <p>Among the NMS for domiciliary care is a continued emphasis on the specific needs of the user, with treatment and support carried out swiftly, whilst maintaining the highest level of care and respect</p> <p>Although NMS originally 'drove up the quality of care homes for older people [...] from 28% to 48%' (Opportunity Age, p 61), this figure disguises fact it caused some care home providers to go out of business, thus limiting supply and therefore choice.</p> <p>LAs must develop housing strategies, which are assessed as part of the HIP.</p> <p>Through this initiative, horizontal links between social service, planning, education, housing and transport departments are necessitated to secure the success of the housing strategies. Vulnerable, especially older, people are central to the concerns of the LA housing strategies.</p> <p>Outlines new approaches to strategies for older people that are not only centred on care needs but for their wider well-being and social participation</p> <p>This document provides an update on the 8 standards set out in the National Service Framework (see above). It delivers the following information:</p> <ol style="list-style-type: none"> 1) Further to people-centred care, more power should rest with the end user, for example through the direct payment scheme 2) Progress in joining up measures such as combined mental health and falls services will continue in line with research into their effectiveness 3) With regard to swift responses to needs, preventative procedures such as anticipatory care and population screening shall be used. Local Strategic Partnerships will encourage independence, health and well-being 4) There is need for an alignment between Performance Assessment Frameworks and NHS public health target to better promote active ageing 5) Progress with the 8 NSF standards will continue passed the target completion
Housing Investment Programme (HIP)	1999/2000 2000/2001 2001/2002 2002/2003 2003/2004	
Older People - Building a Strategic Approach. Independence and Well-being 2 Better Health in Old Age	Audit Commission: 2004 NHS:2004	

		<p>date in April 2005. This will include continuing the Older People's Champions network to make sure that care provided is based on need rather than presumptions based on age</p> <p>This report argues that maintaining the health of older people will simultaneously sustain their valuable contribution to society. This will in turn create stronger and more prosperous communities and thus decrease the need for long-term care</p> <p>This document concentrates on promoting healthy living from a young age, through education and infrastructural developments such as more cycle paths. It highlights the smoking, sexual health and obesity as areas requiring improvements and urges that more is done to support those with mental health problems. Health issues facing older people is not covered in this document</p>
Choosing Health (Public Health White Paper)	DoH: 2004	<ol style="list-style-type: none"> 1) Encouraging people to stay in work for longer through flexible retirement packages 2) Helping people back into employment – New Deal for 50 Plus, age discrimination campaigns and working with employers 3) Active ageing <ul style="list-style-type: none"> ▪ promoting safety in the home through publicity campaigns such as 'How to beat the bogus caller' and £12 million ▪ £12 million allocated to Locks for Pensioners scheme ▪ DEFRA 'Warm Front' scheme to tackle fuel poverty. C.58,000 homes improved 4) Implementation of Lifetime Homes Standard in 2007. ODPM PSA agreement to ensure all social housing is rated 'decent' by 2010. 5) Promotion of healthy living – see Choosing Health White Paper (2004) <p>Central proposal include:</p> <ol style="list-style-type: none"> 1) enabling older people to take control of their own resources through Direct Payments and Individual Budgets 2) Focusing on preventative services and early intervention, using the well-being agenda to promote social inclusion and quality in housing (to include adaptations and specialist housing). 3) Establishing a strategic and leading role for Local Government, working with external agencies, notably the NHS, to deliver comprehensive and overarching services for all society 4) Developing innovative services, including the use of technology, for providing services for adult social care
Opportunity Age: Meeting the challenges of ageing in the 21 st Century White Paper on Primary and Community Care	DWP: 2005	
Independence, well-being and choice: our vision for adult in England (Green Paper)	DoH: 2005	
White Paper: Our health, our care, our say: a new direction for community services	DoH:2006	<p>This document sets out advice on the following principles:</p> <ol style="list-style-type: none"> 1) Modernization of the system to place the onus of the end user 2) Care based in the community

<p>A Sure Start to Later Life: Ending the Inequalities for Old People</p>	<p>ODPM: 2006</p>	<p>3) Care organized to promote and maintain health, independence and well-being 4) Improve access to doctors and community services 5) Care delivered as close as possible to the home 6) Sustained support for those in need of long-term care</p> <p>The Sure Start model works on the basis of providing a plethora of services in a single, accessible local situation to assist older people live healthy, independent and fulfilling lives. The objective is to prevent crises of exclusion, premature dependence and poverty.</p> <p>Agreed actions from this report are:</p> <ol style="list-style-type: none"> 1) Under name of 'Link-Age Plus' DWP will pilot Sure Start approach and disseminate findings 2) ODPM and DWP will look to encourage take up of benefit entitlements 3) Investigate causes of pensioner poverty and factor results into PSA's and Comprehensive Spending Review 4) Piloting schemes for intermediate care for homeless people 5) Promote collaboration between Local Government departments including health care and social services 6) DH to publish 'Next Steps' document relating to dignity, active ageing and responsive services 7) DCMS to publish findings on encouraging cultural and leisure participation amongst older people 8) Volunteering and life-long learning to be incorporated into Sure Start pilots 9) ODPM, DH and DEFRA will create housing strategy for older people during 2006-7 (see National Strategy for Housing in an ageing society (Pre-strategy Document) below) 10) Older peoples' housing needs to be drafted into 'Housing Diversity Action Plan' 11) Development of aids, assistive technologies and adaptations as part of Disabled Facilities Grants review 12) Promoting lifetime homes standards through incorporation into Code for Sustainable Homes 13) Investigate possibility of including transport element into individual budgets 14) Potential to creating Office for Ageing and Older People to be investigated by Government Ministers 15) As part of CSR 2007, relevant Government ministers to ensure cross-collaboration between departments for policies on older peoples 16) Green Paper on Discrimination Law to review public sector duties to ensure equality of age and extension of discrimination laws on delivery of products and services to illegalise such discrimination towards older people 17) Role of Director for Adult Social Services to include tackling exclusion of older
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		<p>people</p> <p>18) Expand leadership role of regional Government Offices in improving services for older people</p> <p>19) ODPM to review effectiveness of LAA's and Sustainable Community Strategies in tackling isolation among elderly populations</p>
<p>Comprehensive Performance Assessment (CPA)</p>	<p>Audit Commission: 2006/7</p>	<p>Latest consultation '<i>The evolution of regulation - Comprehensive Area Assessment</i>' ended 14th June 2007. The consultation draws out how the CPA will develop into the CAA. Assessment of service delivery. The Audit Commission has made other contributions to the assessment debate over services delivery in '<i>The Future of Regulation in the Public Sector</i>' (2006) and <i>Assessment of Local Services Beyond 2008</i> (2006).</p>
<p>National Strategy for Housing in an ageing society (Pre-strategy Document)</p>	<p>HM Government: 2007</p>	<p>Sets out the vision for a future housing strategy for the elderly to :</p> <ol style="list-style-type: none"> 1) support healthy, active and independent lives 2) be planned as 'part of the mainstream' (p4) 3) join up services and target the most in need 4) increase the amount of housing stock, both mainstream and specialist 5) reduce mortality such as 'excess winter deaths' (p4) 6) increase the number of homes reaching Lifetime Homes Standards 7) Build stronger communities through participation and involvement 8) Make better use of housing resources such as increasing the take up of equity release schemes <p>Strategy prioritises Individual Budgets and Link-Age Plus schemes; making best use of existing housing across whole spectrum and providing leadership in planning and designing new housing stock.</p>
<p>Supporting People – Independence and Opportunity</p>	<p>CLG: June 2007</p>	<p>Four main principles of the Supporting People programme include:</p> <ol style="list-style-type: none"> 1) Ensuring that end users are central to the progress and delivery at the local level 2) Developing links with the Third Sector – CLG has also published a Third Sector Strategy (June 2007) specifically set to improve cross-working in this area. LAA will play an important role in delivering housing support as part of the overall strategy for vulnerable people 3) Reducing bureaucracy and in so doing, maximising efficiency 4) Ensuring the delivery of services within the existing Local Government Framework (as set out by White Paper Strong and Prosperous Communities (CLG: 2006)) <p>Brings together previously disparate housing-related assistance. £339 million of £1.8 billion budget in 2003-04 has gone to assisting older people. Initially more assistance has been given to those in sheltered housing so older home-owners are now being</p>

		specifically targeted.
National Framework for NHS Continuing Healthcare and NHS-Funded Nursing Care	DoH: 2007	<p>A key outcome of the Supporting People initiative is the National Database of Services: a one-stop shop for information and contacts in the field</p> <p>NHS Continuing Care may be provided in a variety of settings, including the home and eligibility is dependent on a range of considerations, which does not include diagnosis of any one illness/condition. People-centred care is an essential facet of this agenda. The NHS either fund and provide the care necessary directly, or fund a third party care home to provide this care.</p>
Reaching out: Progress on Social Exclusion	Social Exclusion Unit: 2007	<p>It is stated within this document that 1million pensioners have been delivered from relative poverty since 1997 and that during this time, there have been a reduction of 1 million in the number of non-decent social homes.</p> <p>The Reaching Out Action plan (2006) has the following 5 objectives:</p> <ol style="list-style-type: none"> 1) Locate cases of exclusion early 2) Identify and disseminate best practice models 3) Tackling exclusion will be based on individual needs 4) Create a holistic approach through cross-departmental working 5) Pursue top-down measures for under-performing LA's

SNAPSHOT OF RECENT DEVELOPMENTS IN ENVIRONMENTAL AND ENERGY POLICY

Title	Publisher: Date	Scope of initiative
<p>Fuel Poverty in England: The Government's Plan for Action</p>	<p>DEFRA: 2004</p>	<p><i>Warm Front</i> is the principle scheme by which the Government aims to eradicate fuel poverty by 2010. The basis for this scheme was set up in 1991 as Home Energy Efficiency Scheme (HEES) and became <i>Warm Front</i> in 2000. The scheme particularly targets vulnerable people and those on low incomes as these constitute the majority of people suffering from fuel poverty. <i>Warm Front Plus</i> tackles the problems faced by older people (50+) in fuel poverty. The scheme was set up in 2000 and has since received additional funding (£140 million in the 2004 Spending Round).</p> <p>The Government acknowledges that tackling fuel poverty will also reduce social exclusion, improve health, increase the number of decent homes, assist the vulnerable and older generations as well as lessen poverty generally.</p> <p>As part of this action plan, the Government also seeks to provide a tax allowance for private sector landlords to incentivise investment in insulation. <i>Warm Front</i> targets private sector as well as public sector housing. This is important considering the English House Conditions Survey report (2001) noted that 80% of housing failing the decent homes standard was in private ownership.</p> <p>The Government's action plan has sustained criticism from the National Audit Office in their report '<i>Tackling Pensioner Poverty: Encouraging take up of Entitlements</i>' as through this document it is apparent that as many as one third of people denied assistance from <i>Warm Front</i> are suffering from fuel poverty. Since there is a resistance to accept benefits, and eligibility for <i>Warm Front</i> is based on such receipt of income and/or disability support, people are not being rewarded <i>Warm Front</i> funds despite being in need. This is clearly a concern, as stated in this report, 'over 60% of the fuel poor not eligible for <i>Warm Front</i> are single elderly householders, with many of the remainder being elderly couples' (p.18) Although there is clearly a case for reluctance to claiming benefits, due to lack of accessible information and exclusion, older people may not be aware they could be eligible for such benefits.</p>
<p>Government Energy Efficiency Action Plan 2nd Annual Progress Report</p>	<p>DEFRA: 2004</p>	<p>Two of the Decent Homes Standards are particularly relevant to this my research.</p> <ol style="list-style-type: none"> 1) bringing all the social housing to a decent standard by 2010 2) increasing the proportion of private housing in decent condition occupied by vulnerable people to 70% by 2010.
<p>Code for Sustainable Homes: A step change in sustainable home building practice</p>	<p>CLG: 2006</p>	<p>The Code for Sustainable Homes sets out a checklist of standards for buildings to reach in order to be rated sustainable (the lowest rating starting above the mandatory standards set out in Building Regulations: Approved Document L (2006) 'Conservation of fuel and power'. Among the standards established in this document</p>

The UK Fuel Poverty Strategy Fourth Annual Progress Report	Defra: 2006	<p>are lowering the running costs of homes (thus reducing the number of people suffering from fuel poverty) and improving well-being by ensuring healthier living conditions. The Code for Sustainable Homes takes over the progress begun by the EcoHomes Standard</p> <p>This document presents the statistic that during the period 1996-2003 over half the reduction in fuel poverty was due to income improvements, with only 1/5 of this reduction being as a result of fuel efficiency. This demonstrates there is major scope for improvement in this area, and the growing global emphasis on fuel efficiency and reducing carbon emissions will only increase the urgency on this matter</p> <p>Further relevant points from this document include:</p> <ol style="list-style-type: none"> 1) £300 million made available to tackle fuel poverty between 2005-08 in Pre-Budget Report 2005. 2) Central Heating Programme (Scotland) 2004-2006. This initiative saw the replacement and modernization of homes in the private sector exclusively for 80+ year olds. 3) Energy Efficiency Commitment (2002-05). Here energy suppliers have focused at least 50% of energy savings on a 'priority group' comprising people on low incomes, to include elderly people. 4) Design and Demonstration Unit (DDU) at part of DTI 2005-06. The objective here was to provide mains gas to deprived communities. 5,000 homes have been assisted 5) Warm Zone Limited has improved the energy efficiency of 425,000 homes and targets the most vulnerable sections of society 6) The Government has introduced an annual £200 Winter Fuel Payment for pensioners to respond to the phenomena of excessive winter deaths.
Home Information Packs	CLG :2007	<p>Following the EU Directive 2002/91/EC on energy performance, householders must provide Energy Performance Certificates (EPCs) in their Home Information Packs on selling their homes (4+ bedrooms) as of 1st August. These measures will be phased to later include smaller dwellings. Although this measure sets minimum energy performance targets, thus reducing the 'carbon footprint' of the house, in beginning with the sale of larger houses, it is uncertain whether older people will benefit initially</p>

FIGURE 1.2 PLANNING HISTORY

LAND AT FORMER HMS ROYAL ARTHUR, CORSHAM, WILTSHIRE

DESCRIPTION OF DEVELOPMENT	DECISION DATE	APPLICATION NUMBER	CASE OFFICER	APPLICANT	AGENT
The Development of a Retirement Care Village Comprising: 72 Bed Care Home; 80 Extra Care Apartments; 129 Supported Living Units; 95 Covered Car Parking Spaces; Associated Community Facilities Including a Community Activity Centre; Retail/Administration Unit; and Ancillary Offices/Maintenance Centre	19/12/2005 Refused	05/02094/OUT	Tracy Gray	Royal Arthur Park Ltd, WD3 1AY	WSP Development, London, EC1N 2HS
Residential retirement care community park comprising: 72 bed nursing home; 80 care apartments; 129 dwellings; community hall; workshop; shop/post office and 95 garages	Withdrawn	04/02548/FUL	-	Royal Arthur Park Plc, BH13 7QQ	Rymills & Partners Architects, OX28 4AW
A residential care community comprising 60 bed nursing home; 30 close care apartments; 50 one-bedroom dwellings and 80 two-bedroom dwellings and associated communal facilities and offices	24/09/2003 Refused	03/02220/OUT	-	Royal Arthur Park Plc, BH13 7QQ	Rymills & Partners Architects, OX28 4AW
Details of 26 bungalows and associated works	21/10/2002 Granted	99/01805/REM	N/A	Beazer Homes (Bristol) Ltd, BS17 6AY	Mason Richards Partnership, BS32 4NG
Outline – residential development including open space and associated works	17/06/1999 Refused	99/00825/OUT	N/A	Beazer Homes (Bristol) Ltd, BS17 6AY	Mason Richards Partnership, BS32 4NG
60 bed nursing home / 30 close-care apartments / 50 one bedroom dwellings / 80 two bedroom dwellings / associated facilities and offices nursing home/residential development	17/09/1996 Granted	96/00122/OUT	N/A	Royal Arthur Developments Plc, SO3 9JE	Mr P Trevelyan - ABT Consultancy, AL3 4HN
Certificate of Lawfulness for residential training centre	16/10/1995 Granted	95/01548/CLE	N/A	L Ovalfilter Ltd	Mr P Trevelyan - Consultancy, AL3 4HN

ANNEX 2: SUPPORTING MATERIAL

HMS ROYAL ARTHUR, WESTWELLS, CORSHAM, NORTH WILTSHIRE

Image 1



Image 2



Image 3



Image 4



Image 5



Image 6



IMAGE 7

EXITING SITE LAYOUT: REFUSED SCHEME



IMAGE 8

ARTIST'S IMPRESSION: REFUSED SCHEME



Due to issues of sensitivity and pre-maturity, the Agent was unable to provide plans for the renewed scheme.

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- Image 5 – Parade Ground, HMS Royal Arthur, courtesy of WSP Group, email from Peter Farnham to Jennifer Kitson dated 16/08/2007
- Image 6 – Swimming Pool, HMS Royal Arthur;
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- Image 7 - Existing Site Layout Plan, courtesy of WSP Group, email from Peter Farnham to Jennifer Kitson dated 16/08/2007
- Image 8 - Artist's Impression: Refused Scheme, courtesy of WSP Group, email from Peter Farnham to Jennifer Kitson dated 16/08/2007