



SBHA AGEING WELL STRATEGY 2021-26

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2 Executive Summary

This 2021-26 SBHA Ageing Well Strategy (AWS) has been developed in response to the recognised ongoing changes to the age profile of the organisation's applicants, Tenants, and the wider demographic change of the Scottish Borders. It provides an overview of how Scottish Borders Housing Association (SBHA) will seek to ensure that its homes and services continue to evolve to meet the needs and expectations of older residents over the next five years. It aligns with SBHA's Strategic Business Plan 2020-25 and outlines priorities and principles for future decisions, to deliver a positive impact for individuals and communities. An Action Plan is included, providing a road map for the strategy implementation.

This document has been developed with the involvement of the Board of Management, Scottish Borders Tenants Organisation (SBTO), the Customer Board, the Executive Team and external third-party organisations providing services to those in later life. Content has been formulated in the context of other SBHA strategies, particularly the Asset Management Strategy and external publications from the Scottish Housing Regulator, Scottish and UK Government, local housing and health agencies and Scottish Borders Council (SBC). In addition, case studies of positive practice from across the United Kingdom have been highlighted and used to inform content.

This strategy has been developed with SBHA's other strategies in mind and has particularly strong linkages identified with both the Asset Management Strategy and IT Strategy, alongside reflecting wider SBHA aspirations regarding growing partnerships, responding to vulnerabilities, economic and inclusive growth, and social challenges of ageing. This strategy's emerging priority themes are summarised as follows:

Priority 1 - Housing Options for Life: Engaging proactively with customers approaching later life to consider their housing needs in years to come and how SBHA can assist in ensuring that all its valued customers have a suitable housing option for life.

Priority 2 - Data & Systems to Drive Tailored Service Delivery: Extension of SBHA's personalisation approach, seeking to ensure that teams have the right information, at the right time and in the right place to enable service delivery. In later years, developing this into an expansion of self service and the use of technology to assist SBHA in proactively targeting tailored services.

Priority 3 - A Little Extra Help: Consideration of the feasibility of delivering low level additional housing management to older customers that may need some additional assistance to successfully maintain their tenancy but whose needs are not yet sufficient to require care.

Priority 4 - Matching Needs with Supply: Where needs of existing customers are known, undertaking a trial of directly 'matching' those needs of existing customers with vacant properties to reduce the waiting time for individuals who struggle with their existing home, and make best use of property attributes when they become vacant. Targeting this at residents in later life has the scope to free up in-demand family sized homes.

Priority 5 - Right-sizing: An extension of Priority 4, SBHA will consider how it can build and improve its existing stock to encourage and facilitate customers reaching later life to 'right-size' into properties that are best suited to enable ageing well.

Priority 6 - Sustainable Aids & Adaptations: Changing the perspective of aids and adaptations, and while looking at the immediate needs of the individual, being mindful to how sustainable the property will be in the longer term even with the adaptations, particularly for customers with ongoing conditions. Reframing adaptations as improvements that can remain in the property long-term and seeking to conduct them in a way that will increase desirability of the property to the widest number of potential customers at relet.

Priority 7 - Inclusive Specifications: When conducting works to properties, being mindful to how inclusive those works are for the changing needs of existing and future customers. Considering small changes of minimal cost impact that can reasonably be made to positively increase accessibility and useability for the widest number of customers.

Priority 8 - Perspective, Knowledge, Awareness & Signposting: A range of initiatives aimed at ensuring that teams are equipped to support customers to age well and reduce social isolation, supported by awareness raising of help and support that is available from third parties to encourage the same. Ensuring that SBHA is also mindful of how it can also best encourage and support its team members in later life.

Priority 9 - Assistive Technologies: SBHA will seek strategic partnerships to facilitate customer access to an appropriate and up-to-date range of assistive technology options that can support ageing well. This will be complemented by joint communications initiatives that look to impact positively beyond the customers of SBHA and its partners for the benefit of the wider Borders community.

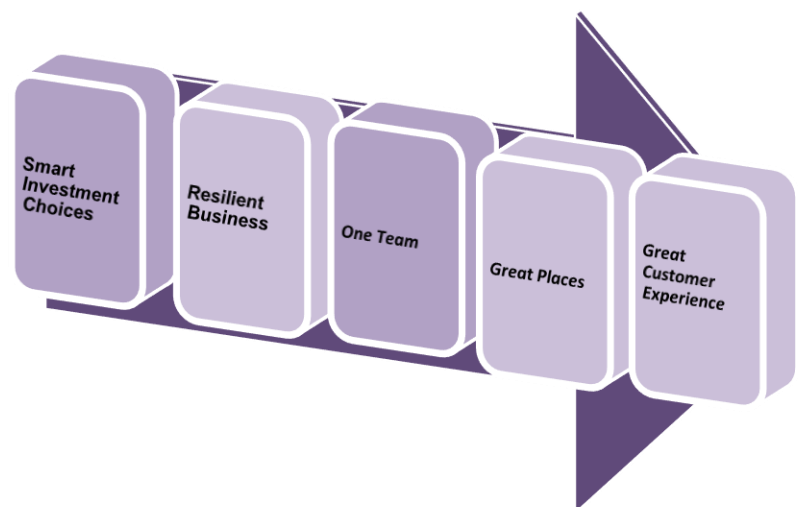
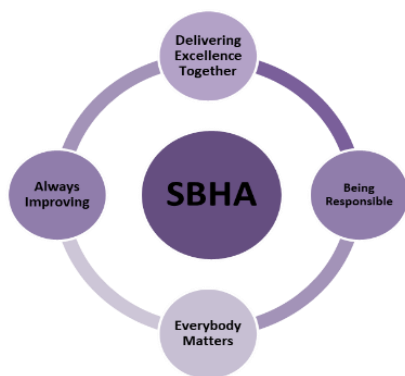
The Action Plan will be monitored and reviewed every six months by SBHA's Executive team, with an annual progress report provided to SBHA's Customer Board.

3. About SBHA

“Created by Tenants for Tenants, we enhance lives and communities across the Scottish Borders. We shape our homes and services to meet changing needs and expectations.” We are a Registered Social Landlord (RSL) operating within the Scottish Borders since 2003, following a transfer of housing stock from Scottish Borders Council. SBHA is also a registered charity overseen by a Board of Management which is made up of 4 non-tenant elected members, 4 tenant elected members and 4 appointed members. We currently have 5,603 homes across 49 settlements, with concentrations of stock in Hawick, Galashiels, Peebles, Selkirk, Kelso, and Jedburgh. The majority of homes are for general let with 63 homes provided as amenity accommodation exclusively for older and/or vulnerable people.

SBHA has an ageing customer demographic, currently there are 6191 individual SBHA Tenants, 22% of which are over 65 while only 5% are under 25. Of the remainder, a significant proportion will move to pensionable age in the next 10-15 years, combined with generally increasing life expectancy and the numbers of single households, this will put additional pressure on SBHA homes and services. SBHA is committed to facilitating this changing demographic to age well.

From our inception, we are now emerging as a transformed organisation in terms of services, investment, finances, governance, and tenant engagement. Involvement, performance improvement, customer service and community development remain underlying priorities and are reflected in the Association's strategic objectives, which are underpinned by SBHA's values.



4. SBHA Achievements Since 2015

Although SBHA has not previously had a specific Ageing Well Strategy, over recent years it has undertaken a range of projects and initiatives that have aimed to positively contribute to the needs of older customers. These include:

- Conclusion of the SBHA Transforming Older People Services (TOPS) programme which commenced in 2010/11 and included amendments to physical assets, for example the redevelopment of Rutherford Square & Tweed Court in Kelso and Myreslaw & Deanfield Courts in Hawick, from traditional, sheltered schemes to more flexible and desirable amenity and general needs accommodation. This culminated in circa 300 homes being improved and/or reclassified.
- Existing amenity accommodation has seen improvements including heating systems, smoke detectors and communal areas in response to Tenants' feedback. SBHA now has 235 amenity homes, of which 63 are amenity blocks.
- Service development, such as partnerships enabling the streamlining of access to and delivery of aids and adaptations, with Borders Care & Repair, and supported by an ongoing SBHA commitment to provide an additional £100k per annum to supplement grant funding.
- Responding to emerging needs through the planned development of a Wellbeing Framework to support increased personalisation of services in line with the SBHA's Customer Back agenda.
- Amendments to the SBHA Allocations Policy to enable customers who are under occupying a property to have more flexibility in the size of property they can be considered for transfer to, and younger applicants (over 50) to amenity accommodation.
- Widening digital access for older people through delivery of activities within the Connecting Scotland initiative.

5. Development of the Ageing Well Strategy

Our Strategic Business Plan 2020-25 forms the foundation of all SBHA's internal strategies, which, in turn, are designed to mutually complement each other.

This Ageing Well Strategy has also been developed to respond to numerous existing external documents, plans, strategies, consultations, and guidance relevant to the delivery of services to older people including:

- *Scottish Borders Community Planning Partnership and Local Housing Strategy*
- *SBC Integrated Strategic Plan for Older People's Housing, Care & Support 2018-28*
- *SBC Housing Strategy*
- *Borders Older People Planning Partnership (BOPPP) Covid 19 Consultation*
- *Scottish Borders Health & Social Care Partnership - Changing Health & Social Care for You 2018-21*
- *Scottish Borders Rapid Rehousing Transition Plan 2019/20–2023/24*

To ensure a rounded understanding of the local context, informal interviews have taken place with key partners, including other housing providers operating in the Scottish Borders. The strategy also seeks to respond to other related local, regional, and national initiatives that impact on expectations of homes and services, including the requirements of the Scottish Housing Regulator, Scottish Government National Outcomes, the Homes Fit for 2040 agenda and the South of Scotland Regional Economic Strategy.

This strategy also responds to feedback received from customers and SBHA Team members through a range of consultation exercises that sought to understand experiences and perceptions, particularly regarding people's priorities for their homes and services in later life.

Finally, to assist in driving innovation of content, examples of good practice have been highlighted to demonstrate responses to emerging themes.

The development of the Strategic Business Plan 2020-25 themes, objectives and actions are the culmination of consultation activities with Tenants, SBTO, the Customer Board, Board of Management and SBHA teams. The draft AWS underwent a consultation process during April/May 2021 with SBHA Teams, SBTO, the Customer Board and the Board of Management prior to approval.

Strategic Plan 2020-2025 - Objectives

- Great Customer Experience
- Great Places
- One Team
- Resilient Business
- Smart Investment Choices



6. Aims & Objectives of the Ageing Well Strategy

From the development of the Strategic Business Plan 2020-25, the following emerging priorities relevant to the AWS were identified:

- Meeting the demographic challenges facing the Scottish Borders Community, e.g. an increasing ageing population, a reducing younger population, health inequalities.
- Assisting older people to remain in their home and participate in their communities.
- Capitalising on digital access without leaving people behind.

The Strategic Business Plan 2020-25 consequently committed to the following objectives to be addressed by this Strategy:

- *Deliver commitments in SBC's Older People's Housing Strategy 2020-25 through a housing options approach, with particular emphasis on those at risk in their homes and those in a care environment unable to return home due to physical circumstances.*
- *Explore models of housing for older people that support them to remain in their community.*
- *Link wheelchair accessibility and lifelong homes project objectives within SBHA's Asset Management Strategy 2021-26, including increasing the supply of wheelchair accessible homes (new or refurbished), with targets in each category, and introducing lifelong home design standards into life cycle works.*
- *Develop technological and design measures that deliver more adaptable and flexible homes.*

This strategy aims to support the ongoing evolution of our homes and services to meet these identified challenges and objectives, as well as further concerns that have arisen from the research undertaken for its formulation. It aims to be ambitious in seeking to respond to and meet the changing needs and expectations of existing older people and proactively prepare SBHA for tomorrow's older generations and integrate what we have learned so far from responding to the Covid-19 pandemic.

It is recognised that SBHA alone is unlikely to meet all the needs of all its customers and therefore the strategy also aims to identify the key current and future partnerships that will be necessary to ensure needs do not go unmet. Because of these wider objectives, and the research and consultations undertaken in the development of this strategy, the following nine ageing well priorities have emerged for SBHA to drive forward:

6.1 Ageing Well Strategic Priority 1: Proactive Review - Housing Options for Life

SBHA homes are generally let on the principle of being a 'home for life' and many customers remain in their tenancies for many years and share this understanding. Many of these households will have evolved and changed over time, but it has not generally been common practice to engage with customers regarding how they envisage their home being appropriate for them as they enter later life.

We will pilot undertaking proactive reviews with a selection of Tenants who have reached an agreed milestone, initially with customers over 75, then working back to those aged 55 and/or the 25th anniversary date of the tenancy commencement depending on the reactions of Tenants and the volume of demand identified. Effectively a 'Tenancy MOT', the review will seek to achieve several different aims:

- Encouraging customers to reflect on how they see their housing needs and priorities changing looking forward. Consideration of to what degree they can react to these changes themselves and what support and assistance they may need.
- Ensure customers understand that SBHA values them as 'customers for life' rather than simply Tenants of their current property and that, in thinking ahead and communicating, there is greater probability that the right future property can be identified before they find that their home challenges their wellbeing.
- An opportunity to appraise the property that otherwise may not have been accessed for SBHA for many years and proactively identify repairs and maintenance issues that may have gone unreported.
- Linking in with Ageing Well Strategy Priority 2: An opportunity to verify the quality of the data held regarding the household and address missing information.

The pilot will be undertaken in the first half of the strategy period and will be evaluated through a cost benefit analysis and customer feedback to ensure that the resources required to undertake the initiative are proportionate to the benefits for both the organisation in terms of business planning and customers in terms of satisfaction. It is acknowledged, however, that a substantial proportion of the benefits that can be achieved will be in the longer term.

6.2 Ageing Well Strategic Priority 2: Data and Systems to Drive Tailored Service Delivery

We need to ensure that teams are equipped with the information to deliver suitably tailored services to older people, meeting their needs right first time. A foundation of achieving this is ensuring that there is appropriate, robust, accessible and, as far possible, live data. Enabling ageing well through having customer vulnerabilities and health information alongside data regarding the accessibility, potential accessibility, and adaptations of SBHA homes, will strengthen our ability to understand and meet changing needs. Some data is already held, both from day-to-day customer interactions and through SBHA customer insight activities, however for it to be used effectively, accessibility is key. In addition, datasets need to balance detail with commonality of content allowing the data held to be suitably analysed. To achieve this, three stages of system development are anticipated that will be linked in with the IT strategy objectives:

- Ensuring that systems have the capability to hold the right data fields, with the right definitions in the right locations, for teams' effective use. This needs to be populated with clear, consistent data with a robust approach to data assurance and management. In terms of property data, this is envisaged to align with objectives within the Asset Management Strategy.
- The data held is the customer's data. For this to be as up-to-date as possible, maximise the opportunity for 'self-service', enabling customers to update information regarding health needs, vulnerabilities, and concerns regarding the future suitability of their home, subject to a suitable validation approach. This is potentially achievable through the ongoing development of the MySBHA App and linking in with digital inclusion activities. There is an additional longer-term aspiration that, subject to customer consent, 'self-service' can become automated through data being shared to and from assistive technology solutions they are using.
- With increasing amounts of maturity and confidence in the data held, the system shall be developed further to use appropriate algorithms and rules so that it is able to alert colleagues when proactive contact would potentially be appropriate, driving a targeted approach to the finite staffing resources and linking with both the Wellbeing Framework and the IT Strategy.

Throughout development, the organisation will remain minded to the GDPR and security implications arising. Although driven by this Ageing Well Strategy, this priority is anticipated to have wider positive impacts through its application for all vulnerable customer groups.

6.3 Ageing Well Strategic Priority 3: A Little Extra Help

A key priority is seeking to ensure that customers have, wherever realistic, the option to remain in their settled accommodation until they feel ready to move. The difference in service from being largely self-sufficient in a general needs property to requiring a service such as domiciliary care can be substantial.

To address this gap, SBHA will explore the potential for introducing a floating housing management-based tenancy support service for customers who would benefit from a small amount of additional support around landlord-related functions, for example ensuring their home is safe and secure. Such support could be delivered face-to-face or remotely as appropriate. It is envisaged that this would link with existing personalisation and financial inclusion activities. Such support approaches are already being operated for homeless people in the Borders.

Such a service could potentially be Housing Benefit service chargeable eligible, to be cost neutral for the majority of customers and the organisation. However other funding approaches will be explored along with options appraisal regarding SBHA undertaking delivery or working in partnership with a one or a range of third-party partners.

6.4 Ageing Well Strategic Priority 4: Matching Needs with Supply

Linking in with Ageing Well Strategy Priority 2, cohesive, consistent, and accessible customer and property data will enable SBHA to evolve its approach to allocations and lettings.

To make best use of the current housing stock, SBHA will ensure its allocations policy and housing options offer enables it to pilot a more explicit approach to matching the property attributes of available homes to the health and wellbeing data of existing customers awaiting transfer and those affected by delayed hospital discharge outside of its main allocations and letting approach. Establishing this can be supported by learning from the pilots undertaken with homeless people to ensure operation is within regulatory compliance and equitable decision making. This enhanced matching approach could also potentially encourage internal mutual exchanges, particularly linking in the outcomes of the 'tenancy MOT's' described in Priority 1.

If a successful SBHA pilot of the matching approach is concluded, SBHA could approach other local RSL's to explore linking data to enable customers with specific needs to a wider pool of potential properties that meet their needs.

6.5 Ageing Well Strategic Priority 5: Right-sizing

Using the learning and experience from the case study summarised at Monmouthshire Housing Association, SBHA will explore the feasibility of piloting the development of a small number of homes that will be designed to promote and enable 'right-sizing' of households that are currently living in homes that are deemed underoccupied and would be desirable for larger families.

Linking in with Ageing Well Strategy Priority 2, data analysis and proactive tenancy reviews are anticipated to lead in identifying households that will be potential right-sizing candidates.

Right-sizing will not be driven by emphasising that the household would be moving to a smaller property, rather they are moving to a property that would distribute the space differently and be designed to be more flexible to future needs. Some more generic accessibility features are likely to be installed at the outset, while the design and construction methods would then also enable quick and easy future adaptation. These homes would be considered general needs properties in line with SBHA's predominant stock.

SBHA already has its commitments in terms of the number of new homes it intends to develop, and these right-sizing properties are to be considered within, rather than additional to, those development targets. Inevitably, additional costs are likely to be incurred over and above the standard development costs, and, given the pilot nature of this right-sizing commitment, SBHA will consider potential sources of innovation grants for this additional expenditure.

In addition, SBHA will consider the range of incentives that it can implement to encourage 'right-sizing' within its wider existing housing stock utilising the customer feedback regarding the main barriers to moving home.

6.6 Ageing Well Strategic Priority 6: Sustainable Aids and Adaptations

Aids and adaptations to SBHA homes have historically been delivered in a manner traditionally typical for social housing providers. The main emphasis on adaptations being applied to the customer's existing home to Occupational Therapists recommendations at the optimum 'value for money'. While this approach has provided relief to many individuals' immediate needs, it has led to adaptations that are sometimes functional in appearance and not always applicable to the individuals' longer-term needs. In addition, such adaptations are often reversed at the point of re-letting as they are either too personalised to the individual or inappropriate for most other potential occupants of the dwelling, for example family-sized homes being without baths following shower conversions.

SBHA will seek support from its aids and adaptations partners to innovate its approach to undertaking aids and adaptations to make them more sustainable for the customer, the property, and the organisation, while also making best use of aids and adaptations funding over a longer-term view. The aims are:

- To consider beyond the individual's immediate needs and how sustainable they will be in the current property once known conditions progress in the medium to long term. The ideal is to identify if an individual is likely to need a move in the future and effect that move earlier and proactively carrying out the adaptations that they are realistically anticipated to need prior to taking occupation.
- To reframe adaptations as improvements that, wherever possible, are designed to be retained in the property beyond the existing tenancy. Considering how the adaptation will impact on future use and ensure that the design and materials are both functional and attractive.
- Ensure that minor aids provide some degree of choice of finishes and designs that are fit for purpose but also visually appropriate to the environment. Where possible, for example around falls prevention, consider how aids and adaptations can be beneficial to wider building users in addition to individuals linking with the organisation wider Safer Communities commitments.
- Having a supply of appropriate interim interventions, such as portable ramps, that can be utilised temporarily to ease a customer's issues while the most sustainable solutions are being defined, agreed, and progressed.

Given the anticipated population change, SBHA will also identify properties that it will proactively adapt as part of a revised lettable homes standard, for example, installing level access showers in bungalows and more accessible ground floor flats and linking this in with planned maintenance investments.

6.7 Ageing Well Strategic Priority 7: Inclusive Specifications

SBHA's Asset Management Strategy demonstrates its clear long-term commitment to keeping homes in good, safe condition and pushing standards forward through the implementation of the Homes Fit for 2040 initiative.

These works will inevitably include replacement and improvement works that can assist in ensuring improved accessibility, usage and efficiency that can positively impact on the experience of ageing while residing in an SBHA home. To maximise this benefit, when developing specifications for works, SBHA will be mindful of resources such as the Housing LIN Accessible Design Group [Accessible Design - Design - Topics - Resources - Housing LIN](#) that provides guidance on small changes that can assist and improve accessibility in addition to complying with statutory and regulatory requirements.

Prioritisation will be linked to schemes that have been identified for repurposing, existing amenity schemes and other properties becoming vacant that need significant works and for which there is an identified potential 'right-sizing' transfer for an existing customer. The aim is to optimise the future proofing of these homes for incoming customers within the scope of existing planned improvements, aligned to the Asset Management Strategy.

6.8 Ageing Well Strategic Priority 8: Perspectives, Knowledge, Awareness & Signposting

Continuous improvement of the *customer back* principle is reliant on teams being equipped with the skills and knowledge to deliver suitably tailored services to older people, right first time. As a baseline, as part of our mainstream learning and development programme, inductions will include structured content around the profile of customers, and it is anticipated that this will include content on the challenges that ageing can bring and the solutions and mitigations that teams have at their discretion to use. As part of delivering our Everybody Matters commitment within Our Values, we will ensure that this training evolves with the emerging needs of older customers identified through the data collected in delivering the other priorities within this strategy.

While theoretical training can provide some perspective, knowledge and awareness can be generated through SBHA's active engagement with wider third-party campaigns on topics that can affect the ability to age well and reduce social isolation. This also gives the opportunity to link with customer and community communications to extend the knowledge and awareness beyond staff.

Key anticipated campaigns would be around a range of ageing well topics that can encourage planning for later life, promote maintaining physical and mental wellbeing and respond to age-related challenges and can be led by SBHA customer insight. For example:

- Alzheimer Scotland - Dementia Friendly
- SportScotland - Active Ageing
- University of the Third Age (u3a) - Creative Programmes
- GOV.UK - Pension Wise

Organisational commitment and cross-departmental ownership of campaigns will be key to ensuring that learning from them is highlighted and embedded in the organisation and ensure that all front-line teams are equipped for appropriate signposting beyond the initial campaigns.

Moving beyond campaigns, regular analysis of customer insight should highlight appropriate ageing well related accreditations and standards that the organisation can use to question practices and drive ongoing changes. From the analysis undertaken for this strategy, initial marks to pursue are:

- Alzheimer Scotland – Dementia Friends Scotland
- Centre for Better Ageing – Age Friendly Communities

6.9 Ageing Well Strategic Priority 9: Assistive Technologies

As explored in section 6.5, digital assistive technologies are a given part of responding to the challenges of ageing. SBHA does not have an extensive network of traditional hard wired 'telecare' equipment within its existing homes, and while SBHA is aware of its use by some customers, the extent of customers self-commissioning or implementation of equipment by third parties is largely unmeasured and not routinely recorded.

Being a general needs housing provider, SBHA recognises that it is not best placed to take a leading role in the assessment for, or provision of, assistive technologies. However, it is keen to ensure that tenancies remain sustainable, and that customers are equipped to support ageing well. To achieve this, the organisation will prioritise being an enabler for its customers to access and effectively use assistive technologies. This will be through four main commitments:

- Through initial piloting, identification of quality-checked trusted suppliers and assessment professionals that can appropriately specify and provide a suite of key technology options that can be utilised for teams' signposting of customers. SBHA will seek to embrace innovation and good practice, either individually or in partnership with others, with the aims of both efficiency and consistency of offer

within the wider community. When signposting occurs, SBHA will seek to follow up that signposting to check it has led to satisfactory outcomes for the customer.

- Linking in with Ageing Well Strategic Priority 2, the development of interfaces for the sharing of data between assistive technologies and SBHA data systems to enable automation of self-service updates around vulnerabilities and health.
- Where necessary, enabling the use of assistive technologies through minor adaptations that support safe and effective installations. For example, relocating phone or power sockets when required.
- Linking in with Ageing Well Strategic Priority 2, as the volume of data regarding health and vulnerabilities increases, undertake analysis to consider future assistive technology requirements for customers and how easy installation can be enabled through amendments to the property relet standard when vacant and the specifications used at point of commissioning new developments.

To try to drive consistency for customers and wider communities served by other RSL's in the Scottish Borders, SBHA will seek to engage other providers on their approaches to supporting assistive technology and, where appropriate and feasible, encourage harmonised or complimentary approaches.

SBHA will utilise sources such as the Technology for our Ageing Population: Panel for Innovation (TAPPI) and its membership of the Scottish Federation of Housing Associations (SFHA) TEC in Housing Charter to ensure that it is aware and responsive to the latest innovations in assistive technology.

7 Consultations & Recent Learning

7.1 Consultation Findings

Outlined below is a summary of feedback from customers, the wider community and SBHA Team members. In response to these findings, we have included linkages to the priority themes outlined in section 4. More detailed information on customer feedback can be found in the Additional Background Information document that accompanies this strategy. The customer feedback was received through consultations undertaken within the SBHA involvement channels, including a survey with SBTO members and a pulse survey through social media. In addition, a workshop style session was undertaken with the Customer Board. Team feedback was received through a number of workshops and sessions with SBHA’s Executive Team.

Theme	Summary	Ageing Well Strategic Priority Linkages
Current & Future Home	<p>Majority of customers are keen to stay in their current home, however biggest concerns appear to be affordability and accessibility of those existing dwellings.</p> <p>Majority of respondents are keen to stay in current home as long as is reasonably practicable. However, feedback suggests that many are pragmatic that a move is potentially inevitable and while they may understand that a move is needed, that move may need to be incentivised and framed in a positive context.</p> <p>The biggest concern expressed regarding moving home is finding an appropriate property, followed by undertaking removals and setting up a new home and the costs and risks associated with these.</p>	<p>Priority 9: Assistive Technologies</p> <p>Priority 3: A Little Extra Help</p> <p>Priority 4: Matching Needs with Supply</p> <p>Priority 1: Housing Options for Life</p> <p>Priority 5: Right-sizing</p>
Current & Future Homes	<p>Primary priorities for homes in later life are accessibility, affordability, effective heating / cooling and having outside space. Followed by secondary priorities of being close to friends, family, and town centre facilities.</p> <p>One respondent did point out that it is sometimes difficult to appreciate features in a current home that are taken for granted until they are gone, a factor that may impact some peoples’ stated priorities.</p>	<p>Priority 4: Matching Needs with Supply</p> <p>Priority 1: Housing Options for Life</p> <p>Priority 5: Right-sizing</p> <p>Priority 9: Inclusive Specifications</p>

Applications' Allocations & Adaptations.	<p>There are some experiences and perceptions of long waiting times for suitable properties impacting on individuals' ability to age well.</p> <p>There is an opportunity to be robust in ensuring properties offered are suitable for those with disabilities and ensuring that disability needs are understood at the point of application.</p> <p>Development of information-sharing and partnerships between RSLs, health bodies and therapy professionals should assist in identifying evolving needs and future potential for moves and adaptations.</p>	<p>Priority 4: Matching Needs with Supply</p> <p>Priority 1: Housing Options for Life</p> <p>Priority 6: Sustainable Aids & Adaptations</p> <p>Priority 5: Right-sizing</p>
Defining Older Age	<p>This strategy does not need to be defined by age. While it is aimed at those in later life, it should aim to encourage SBHA to offer a range of options that can be accessed or applied flexibly as an individual's needs are changing as they age. Sensitivity and personalisation are key.</p>	<p>Priority 2: Data & systems to drive tailored service delivery</p> <p>Priority 8: Perspectives Knowledge, Awareness & Signposting</p>
Aids & Adaptations	<p>There is an increasing expectation of adaptations to remain in current homes with more acceptance of assistive technologies, particularly as those moving into older age groups in coming years have had a greater exposure to and familiarity with digitally based equipment. However, there is a significant amount of older housing and retrofitting adaptations is not as easy as in newer homes. Limited properties have wheelchair accessibility.</p> <p>The approach to aids and adaptations is reactive rather than proactive and adaptations are sometimes unattractive, seeking only to address an immediate need, not make homes sustainable for the longer term.</p>	<p>Priority 9: Assistive Technologies</p> <p>Priority 6: Sustainable Aids & Adaptations</p> <p>Priority 7: Inclusive Specifications</p>
Customer Data	<p>Data on vulnerabilities of Tenants needs to be more complete, and systems able to use that data to help identify causes for concern.</p> <p>More use of live data and wider scope for customers to be able to update their information easily.</p>	<p>Priority 2: Data & systems to drive tailored service delivery</p> <p>Priority 8: Perspectives Knowledge, Awareness & Signposting</p>
Property Data	<p>Consistent housing stock data regarding accessibility, potential for accessibility and existing adaptations needs to be available.</p> <p>Systems need be flexible to have the capacity to hold new data fields and sources and have a robust approach to ensuring the quality of data held.</p>	<p>Priority 2: Data & systems to drive tailored service delivery</p>
Fuel Poverty	<p>Fuel poverty remains a significant issue in the Scottish Borders.</p>	<p>Priority 7: Inclusive Specifications</p>

7.2 Learning from the Covid-19 Response

With the unexpected need to respond to the Covid-19 pandemic, SBHA needed to formulate urgent action to protect the wellbeing of both SBHA residents, communities and teams. Pre-pandemic, SBHA was committed to providing person-centred responses to those identified as vulnerable. This often took the form of reaching out face-to-face to reassure, support and enable people as appropriate. In response to the restrictions that Covid-19 has brought, we switched our approach; instead, teams have been undertaking pro-active phone contact with all residents in client groups that were suspected to have vulnerabilities. This provided a number of benefits:

- *Phone-led contact enabled a greater number of resident contacts to be made.*
- *Proactive, rather than reactive contact enabled us to help residents to identify and communicate issues or potential issues earlier, reducing the opportunity for matters to escalate.*
- *The contacts produced extensive additional information about the needs of residents, resulting in SBHA identifying the need for additional systems to be able to use this data more effectively and efficiently.*
- *Sought to minimise the potential for social isolation.*

During the Covid-19 period, vacant properties have been having virtual videos/tours which would be useful practice to carry on for older/vulnerable people that may not be able to view a property in person. Similar such video tours of wider developments could help appraise accessibility for individuals prior to a vacancy or property offer. Working within the constraints of Covid-19 has highlighted that there are some limited scenarios that do require face-to-face contact and there are some issues, for example suspected safeguarding concerns, that are potentially more difficult to identify without closer interaction.

In late 2020, Borders Older People Planning Partnership (BOPPP) undertook a Covid 19 consultation to explore the impacts being felt by individuals and communities in the Scottish Borders, to which SBHA contributed. The survey showed that, whilst older people felt well supported practically (e.g. medication and food provision, shopping, and financial support), they felt less well supported with their physical and mental wellbeing and even less supported with social engagement. This was a concern as social isolation can often lead to an acceleration in older people's physical and mental decline. In response, BOPPP highlighted a local need to develop more appropriate and varied forms of digital engagement. Additional resourcing is also needed in terms of digital support and hardware, including the rollout of 'digital champions'.

BOPPP also highlighted the need for support to assist small organisations to restart their activities for older people, in both the digital space and in person once Covid-19 restrictions reasonably allow. To achieve this, partnerships and collaborations will be crucial.

8. Background & Context

8.1 Current Housing Market & Population

There are four Housing Market Areas in the Scottish Borders:

Central Borders	Central Borders contains the largest settlements in the Scottish Borders of Hawick with a 2016 estimated population of 13,783, followed by Galashiels with 12,601.
Northern Borders	Northern Borders is a sub-market in the wider Edinburgh market. Links with the Edinburgh housing market creates affordability issues.
Southern Borders	Southern Borders is quite rural with only one main settlement of Newcastleton.
Berwickshire	Berwickshire is a very rural and sparsely populated area. It has an estimated population of 20,920 with the largest town, Eyemouth, housing 3,500 people. Berwickshire is not a current area of operation for SBHA but has linkages for partners and SBHA applicants can come from the area.

The estimated 2017 population for Scottish Borders was 115,020: an increase of 0.9 per cent from 114,030 in 2014. Since 1988, Scottish Borders' total population has risen overall. Scottish Borders is considered a rural local authority where 30% of the population lives in settlements of under 500 people or in isolated settlements.

Persons aged 65 and over make up 24% of Scottish Borders' population. This is a larger proportion than in Scotland as a whole, where 18% are aged 60 and over. Currently, just over a third of the total households in the Scottish Borders are aged over 65 years. Earnings in Scottish Borders are below the Scottish average. Private sector rents are significantly higher than social rents. LHA rates for the private sector are unaffordable to households across all property sizes in many, but not all areas.

As of 2017/18, there were approximately 11,930 properties spread between nine different Registered Social Landlords (RSLs) operating within the Borders. On average, there are some 1,200 lets every year within these four RSLs. Each of these RSLs operates their own choice-based lettings scheme and allocations policies.

There has been an ongoing increase in single households in the Scottish Borders. The increase in single households will have an impact on smaller properties that will also often be in demand with older applicants.

SBC research found that older residents in the Borders say that **affordability** and **choice** across all housing sectors, plus **care and support services based in their own communities**, are most important.

Approximately 68% of older people in the Borders own their homes, and most of these people own their properties outright. The level of equity held by many of these households is considerable, but there are very few options in the private sector for older people wishing to move from their current home to a more suitable housing option to meet their longer-term needs.

25% of older people live in social rented housing, and this is where most of the specialist housing for older people is available. There are very few specialist housing developments targeted for older people in the private sector. There are around 2,200 properties built by housing associations for older people, although a proportion include steps, have no lift, or are considered to be in low demand.

Over the last ten years, SBC and its partners have been trying to **enable older people to continue living at home**, rather than to move into care or nursing homes. This has **not been achieved to the extent that was planned**, and demand for care homes is still very high. There is a need to provide more complex care and support in people's own homes, but the ability to make that change is **constrained by care and support workforce challenges** and market capacity issues in the Scottish Borders.

There is a community alarm service in the Borders offered by SB Cares, part of the local authority, offering a range of Telecare services which can support and enable vulnerable people to live safely and independently in their own home using alarms and sensor activated devices. There is **increasing demand** and **unmet need for adaptations** and Care & Repair **preventative services** in all housing sectors.

In 2019/20, only 2% of people aged 55+ presenting as homeless were households with children; the bulk of applications were from single men (46%) and single women (31%). Most had previously lived in the private rented sector (31%), while 18% were previously owner-occupiers and 14% tenants in RSL accommodation. **70% of homeless people aged 65+ are assessed as needing tenancy support** to help them settle into new accommodation, which contrasts with 40% of all homeless applicants. Support needs of homeless people aged 55+ are significantly higher than for homeless applicants as a whole, with 34% having a medical condition requiring support and 23% with

a physical disability requiring support. An additional 13% require mental health support, although this proportion is lower than for homeless applicants as a whole. SBC has its own tenancy support service but also works in partnership with Penumbra who predominantly work with people aged under 54. The Council is implementing a Rapid Rehousing Transition Plan among other homelessness initiatives. These interventions do not currently have specific features for older people, but are expected to improve overall throughput and outcomes for homeless individuals and families.

8.2 Future Demand

The overall population of the Scottish Borders is not expected to change significantly in the period 2016-41 (increase of 2.4%). However, the constitution of the population by banded age group is expected to change significantly, with a drop in the proportions of children and working-age people and an **increase in the proportion of people of pensionable age. These changes are expected to be more marked in Scottish Borders than in Scotland as a whole.** In particular, proportions of **the 75+ age group in Scottish Borders are projected to increase by 80%, which is even higher than the projected Scottish increase.** The number of households is projected to increase by 8% in the Scottish Borders, compared to 14% nationally.

There is a projected **75% growth in different types of housing, care and support services requirements estimated over the next 10 years.** These needs vary between long-term care and support, lower-level home care, housing support on site and adaptations/small repairs. **Most of the housing, care and support needs will be met in people's existing homes.** A much higher proportion of older households will need and want on-site support as they become frailer, compared to what is currently available locally. **In 20 years' time, half of all households in the Scottish Borders will be aged over 65 years.** Households of people aged over 75 years are growing at one of the highest rates across Scotland – Scottish Borders projects a 90% increase to 2037. The projected increases by age vary considerably by locality, with Tweeddale showing the greatest increase of older people aged over 75 years, followed by Berwickshire – the two areas where the provision of home care is already under greatest pressure. A key challenge for the future will be the increased level of care required for some older people due to dementia. The last SBC dementia strategy predicted an increase of 56% in people living with dementia between 2006 and 2021.

Reflecting the findings above, SBHA internal data demonstrates that it has an ageing customer demographic within its current tenants. There are 6,191 individual SBHA tenants, 22% of which are over 65 while only 5% are under 25. Considering the age profile of the remainder, a significant proportion will move to pensionable age in the next 10-15 years while a further significant proportion will move into the over 50's range. There does not appear to be any trend data to support any expected increases in the number of under 25's applicants, despite SBHA efforts to ensure that there are accommodation options for younger people.

8.3 Commissioning, Funding & Delivery of Services

Most of the public service spend on older people's services in the Borders is through the Scottish Borders Health and Social Care Partnership. The housing, care and support service landscape includes:

- Public bodies – the NHS and SBC through the joint work of the Health & Social Care Partnership, supported by other public services.
- Housing providers – the Council does not own and manage mainstream housing, and so the key partners in social housing are the RSLs. Across all housing sectors, housing developers, private landlords and residential care providers deliver a breadth of homes and services to older people across the Borders.
- Funders and sponsors providing grants, loans or developer investment to supplement capital and revenue spend from public agencies to support new build or redevelopment projects or pump-prime service transformation.
- Individual homeowners and the community, including owners investing in their own homes, and the support of carers, families, and wider volunteers to enable older people to live independent and fulfilling lives for as long as possible.

Together, they support delivery of:

- Clinical/acute services and more than 320 hospital bed spaces at Borders General Hospital near Melrose
- Community hospitals at Coldstream, Duns, Hawick, Jedburgh, Kelso and Peebles
- A network of mental health and learning disability inpatient, community, and day facilities plus 15 health centres across the Borders
- Primary healthcare services provided by over 20 GP practices and a network of dentists, pharmacists and ophthalmic opticians
- A dedicated reablement centre at Waverley
- Garden View, Tweedbank, for the assessment of individuals with high care needs being discharged from acute hospital settings
- Specialist dementia nursing care space at Queens House, Kelso
- The purpose-built specialist Margaret Kerr Unit, Melrose for palliative care
- 19 residential care/nursing homes providing 700 places
- Around 1200 older people receiving care in their own homes, plus more than 170 extra care housing/housing with care bedspaces
- Over 400 sheltered and 52 very sheltered homes as part of over 2,000 social rented homes targeted for older people
- Borders Care & Repair Service
- Community Assistance Hub established in response to Covid-19.

8.4 Local Housing Strategy

In the development of this strategy, SBC's Local Housing Strategy has been considered and further consultations with Strategic Housing team colleagues carried out.

While the strategy does not have a specific section relating to ageing well, there is a clear recognition that there is a "need to meet the needs of an increasingly elderly population". The following content is highlighted in considering SBHA's response to the ageing agenda:

- *A serious under-supply of smaller homes is evident, particularly for older people given the ageing population, and more generally. More lifetime homes and smaller units which can easily be adapted could assist in addressing the shortage of housing and could also be used by several diverse types of household with specialist housing requirements.*
- *The Local Housing Strategy should make an important contribution to promoting independent living. Wherever possible, independent living will be supported in a person's own home through appropriate care, support, adaptations, or technology. However, sometimes alternative accommodation may be required. A wide range of housing needs should be considered in the Local Housing Strategy to ensure that the planning and delivery of housing and related services is focused where it is most needed locally.*
- *At both a national and local level, there has been, and will continue to be, an increase in the number of older people. Life expectancy in Scottish Borders is much higher in comparison to Scotland, as is the 'expected years of life in good health' indicator. However, the rate of increase in dementia in the Scottish Borders is growing faster than nationally. An increasing older population, with a higher incidence of complex needs, means that there is likely to be greater demand for care and support services and for specialist housing provision in the future.*
- *The projected increases in the number of older people and people with dementia, together with unmet needs from people with physical disabilities and people with learning disabilities, result in increased demand for housing support, housing adaptations, and specifically designed or adaptable housing.*

Following consideration of the documentation, further feedback to from the Housing Strategy Team was sought to inform the AWS which highlighted:

- The Council would be open to work more closely on assessments with Social Care and Health, but to enable this, partners need to innovate regarding information-sharing.
- RSL's could potentially provide more consistent information, advice, and service options to older people regarding areas such as

allocations and enabling individuals to be pro-active and maintain their current home.

- Increased matching of empty properties to applicants with known accessibility needs outside of the choice-based letting process could be useful in maximising the benefits of the existing stock and help minimise empty homes.
- Knowledge and enablement of RSL's local networks is important for community capacity given the ongoing challenges to SBC and NHS resourcing.
- There is scope for the approach to development to mature with an increased coordination between Council and RSLs to ensure that new developments are focused on a combined impact.
- The need for more wheelchair and older people's housing is already mapped out.
- SBC recognises that SBHA identified the shortcomings of its transfer legacy sheltered housing and addressed this through demolishing and re-purposing. Consequently, there is some perception of SBHA as a general needs orientated organisation.
- There is scope within the Scottish Borders to further innovate approaches to aids and adaptations and increase coordination of initiatives that seek to make the best use of existing housing stock.

8.5 Assistive Technologies

There has been a range of national initiatives around the scope of technology in supporting people to age well, with varying degrees of co-ordination. In addition, the rate of technological advancement, particularly over the last five years has rapidly increased. Traditionally, options were limited to a relatively small range of hard-wired products that usually required a significant capital investment with installations and upgrades being undertaken across a development or scheme. The rapid development of the broadband network, alongside accessible and secure Wi-Fi equipment for homes and communities, has led to the significant growth in equipment options, functionalities, and new entrants to the supply chain. Individuals with a good Wi-Fi connection, ideally backed-up with a good quality 4G or 5G signal, are now capable of accessing a wide range of products to support ageing well.

Challenges remain, however, in addressing needs for those in more remote locations that may not have access to higher speed internet services or adequate mobile communication signals. In addition, the emerging and changing breadth of choice does bring its own challenge of ensuring that individuals have access to advice and support in order to choose and use the right devices and equipment to meet their current and reasonably anticipated future needs.

Traditional hard-wired provision usually had a high capital cost, often recovered through Housing Benefit eligible service charges applied to the rent. While relatively inflexible, it did manage cost implications for residents with limited incomes. In contrast, the latest aids and support

technology generally has much lower initial expenditure providing the robust Wi-Fi infrastructure is in place. Often, though, this would be implemented on a personalised basis and can involve ongoing subscription-type expenses. Example technology includes:

- *Shetland is using the Wi-Fi-linked 'Ethel Android Tablet' which offers a 'check-in' button, video calling, medication, and other reminders, 'call me' requests, alert sending, exercise videos, photo albums, surveys, email/text messaging in large easy-to-read text and internet browsing.*
- *Systems such as the Alcuris Memo (not requiring Wi-Fi) has a tailored activity stream that is monitored via wireless sensors around the home that are able detect anything unusual or outside of usual routines. It has a link to a call centre for emergencies.*

Future development could involve operating, or facilitating access to, a range of technology-based options via mainstream smart device networks. Such a suite could be offered to both a range of client groups over and above those with ageing-related needs and provide a focal point for the individual, alongside a range of appropriate stakeholders, to proactively review that emerging needs are met. There is scope for organisations, either individually or collectively, to be ambitious in embracing the possibilities that these increasingly tried and tested technologies offer.

8.6 Other Registered Social Landlord Accommodation & Services

There are principally three other RSLs operating in the Borders area, a profile of each can be found in the Additional Background Information document that accompanies this strategy. However, in summary:

- There has been a general shift from the operation of traditional sheltered housing models to either more flexible independent living schemes such as amenity type accommodation or models such as extra care with a wider range of on-site services.
- Organisations appear to have been taking independent approaches towards the evolution away from traditional hard wired monitoring systems to differing levels of assistive technology offerings.
- There has been moves towards treating the housing stock more flexibly, removing some of the more traditional ring-fencing of certain schemes and stock types for particular client groups.
- There appears to be some shared scope for making better use of legacy aids and adaptations with the Borders social housing stock.
- RSL's seem to have a consistent issue of under-occupied family sized accommodation and a lack of consistent incentives to downsize.
- The Care and Repair service operated by EHA appears to be being widely utilised and/or promoted by RSL in the area.
- While there are examples of RSL's working jointly in some aspects of allocations and lettings, there is not yet a cohesive co-ordination across all stock / applicant types.

In developing this strategy, good practice from social housing providers beyond the Borders area has also been considered. In summary, this has highlighted:

- The positive use of developing home specifications to maximise accessibility and flexibility of homes.
- The positive impact of achieving accreditations that drive service delivery changes and standards that enable customers to age well.
- Successful examples of using a 'right-sizing' approach to make best use of the current housing stock and overcome the negative perceptions associated with 'downsizing'.
- Good practice on providing intermediate services that support re-enablement following stays in hospital or nursing/care environments including ensuring the accessibility of assistive technologies.

Full details of these examples can be found in the Additional Background Information document that accompanies this strategy.

9 Linking Ageing Well Priorities with SBHA's Strategic Objectives

The Ageing Well strategic priorities are expressed in detail below in the context of the wider SBHA strategic objectives:

Great Customer Experience

Strategic Theme: Transformed Outcomes and the SBHA Offer

Priority 1 - Housing Options for Life: Engaging proactively with customers approaching later life to consider their housing needs in years to come and how SBHA might be best able to assist in ensuring that all its valued customers have a suitable housing option for life.

Project Objectives:

My SBHA - Service:

- The expansion of the principles of *customer back*, with increased empowered decision making for customers and the SBHA Team underpinned by a clear service offer.
- Expand the Offer in terms of access, sign posting and direct services.

The Customer Journey:

- Increased focus on using technology to keep people informed and confirming outcomes to prevent dissatisfaction and complaints.

Great Information:

- Bring the information to the customer via social media, website, and emerging technology to shift digital access and enable high quality targeted information for those not using digital access.

Strategic Theme: Reducing Inequality and Personalising Services

Priority 2 - Data & Systems to Drive Tailored Service Delivery: Extension of SBHA's personalisation approach to services, seeking to ensure that teams have the right information, at the right time and in the right place to enable service delivery. In later years developing this into an expansion of self service and the use of technology to assist SBHA in proactively targeting tailored services.

Priority 3 - A Little Extra Help: Consideration of the feasibility of delivering low level additional housing management to older customers that may need some additional assistance to successfully maintain their tenancy but whose needs are not yet sufficient to require care.

Priority 4 - Matching Needs with Supply: Where needs of existing customers are known, undertaking trial of directly 'matching' those needs of existing customers with vacant properties to reduce the waiting time for individuals that are struggling with their existing home and make best

use of property attributes when they become vacant. Targeting this at residents in later life also has the scope to free up in-demand family sized homes.

Priority 5 – Right-sizing: An extension of priority four, SBHA will consider how it can build and improve its existing stock to encourage and facilitate customers reaching later life to ‘right size’ into properties that are best suited to enable ageing well.

Project Objectives:

Understand the Context:

- Strengthen connections and referral pathways with partners delivering in the neighbourhoods to deliver better outcomes.

Prevent and Sustain:

- Pilot the use of risk assessment methods for those in higher risk groups of not being able to live in their home or with changing needs e.g. people with degenerative conditions.
- Expand the Housing Options approach to increase support to vulnerable applicants in housing need.

Support an Aging Population:

- Deliver commitments in the 2019-22 Older People’s Housing Strategy through the housing options approach – with particular emphasis on those at risk in their homes and those in a care environment unable to return home due to physical circumstances.
- Explore models of housing for older people that support them to remain in their community.

Great Places

Strategic Themes: Environmental Impact & Investment in Homes

Priority 6 - Sustainable Aids & Adaptations: Changing the perspective of aids and adaptations, and while looking at the immediate needs of the individual being mindful to how sustainable the property will be in the longer term even with the adaptations, particularly for customers with ongoing conditions. Reframing adaptations as improvements that can remain in the property long term and seeking to conduct them in a way that will increase desirability of the property to the widest number of potential customers at relet.

Priority 7 - Inclusive Specifications: When conducting works to properties, being mindful as to how inclusive those works are for the changing needs of existing and future customers. Minor changes of minimal cost impact that can reasonably be made to positively increase accessibility and useability for the widest number of customers.

Project Objectives:

Environmental:

- Establish 6 Year Environmental Programme and work across tenures to ensure a mixed tenure standard.
- Increase targeted actions to address the quality of the environment and implement assurance standards e.g. Keep Scotland Beautiful.

Reaction to Prevention & Longer Life Cycles:

- Delivery the second 6 Year Plan and assess opportunities for longer life cycle elements.
- Review the Asset Management IT System to allow for more detailed asset information, analysis, and planning.

One Team

Strategic Themes: Developing the Talent Pool and Equipping the Team

Priority 8 - Perspective, Knowledge, Awareness & Signposting: A range of initiatives aimed at ensuring that teams are equipped to support customers to age well, supported by awareness raising in with SBHA community of customers of help and support that is available from third parties to encourage the same.

Project Objectives:**Skills Development:**

- Incorporate new skills that this plan requires, particularly digital skills to maximise the use of new technology, mainstreaming areas of work such as energy advice and the ability to forge partnerships in day-to-day work.

Engagement:

- Review the principles of employee engagement and participation.
- Review accreditation arrangements and introduce a regular People Survey.

Attraction & Retention:

- Undertake a fundamental review of the approach to attraction and retention, investment in learning and career pathways with a view to future proofing skill sets. Achieve Living Wage accreditation.

Smart Investment Choices

Strategic Theme: Ambitious Collaboration

Priority 9 - Assistive Technologies: SBHA will seek strategic partnerships to facilitate customer access to an appropriate and up to date range of assistive technology options that can support ageing well. This will be complemented by joint communications initiatives that look to impact positively beyond the customers of SBHA and its partners but for the benefit of the wider Borders community.

Project Objectives:

New Solutions:

- Pursue opportunities to work with stakeholders to progress stronger outcomes for Tenants and communities e.g. deliver the Disability Residential Project in partnership with Aberlour and SBC.

Shared Learning:

- Explore academic partnerships for learning, research and developing new approaches and products.
- Explore commissioning and delivery partnerships to maximise and target resources on asset quality and value.

Expanding Technology:

- Explore digital partnerships to pilot new technology to support increased interaction and engagement with Customers.

Innovation and Growth:

- Align plans with opportunities for regional change e.g. Borderlands and SOSEP etc.
- Attract resources – financial and added value – for innovation and growth.

10 Monitoring, Review & Communication

As set out within SBHA's schedule of delegations, the Ageing Well Strategy is approved by SBHA Board of Management and progress of its implementation will be monitored and reviewed six-monthly by SBHA's Executive team, with an annual progress report delegated to the Customer Board. The Action Plan for delivery is outlined in Appendix 1.

Existing Key Performance Indicators that link with the delivery of the strategy have been identified, in addition a small number of additional bespoke measures will be developed where strategic priorities are not covered by existing indicators. All these will be monitored quarterly by the Strategic Leadership Team with the relevant reporting to the Board of Management and Customer Board. The details of the performance indicators are outlined in Appendix 2.

Any related expenditure and forecasts are monitored monthly by the Executive Team and quarterly by the Board of Management. An initial appraisal of the financial implications of the strategy priority areas are outlined in Appendix 3.

Progress with the strategy will form part of informal customer consultations and communications through the year and an update on progress will be included within the organisation's Annual Report.

Appendix 1 Ageing Well Strategy Action Plan

Appendix 2 Key Performance Indicators

Appendix 3 Financial Implications

Appendix 4 Additional Background Information