



**n-able**

*Designed to support Independent Living*

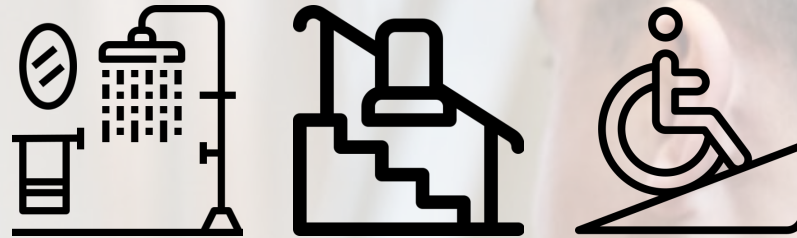
**Tony Taylor**  
Operations Director



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April 3<sup>rd</sup>, 2023, saw the launch of the new Alliance Nurse DFG N-Able service, with the recruitment of a fully experienced team of Occupational Therapist and Case Workers. Alliance have since raised awareness of the availability of grants and have been guiding our clients through the process. Our O.T. and the case workers are the frontline of client interaction, providing smooth customer services. The service seek to achieve cost savings to the councils by helping people continue living in their own homes rather than moving into local authority care by providing adaptations for example

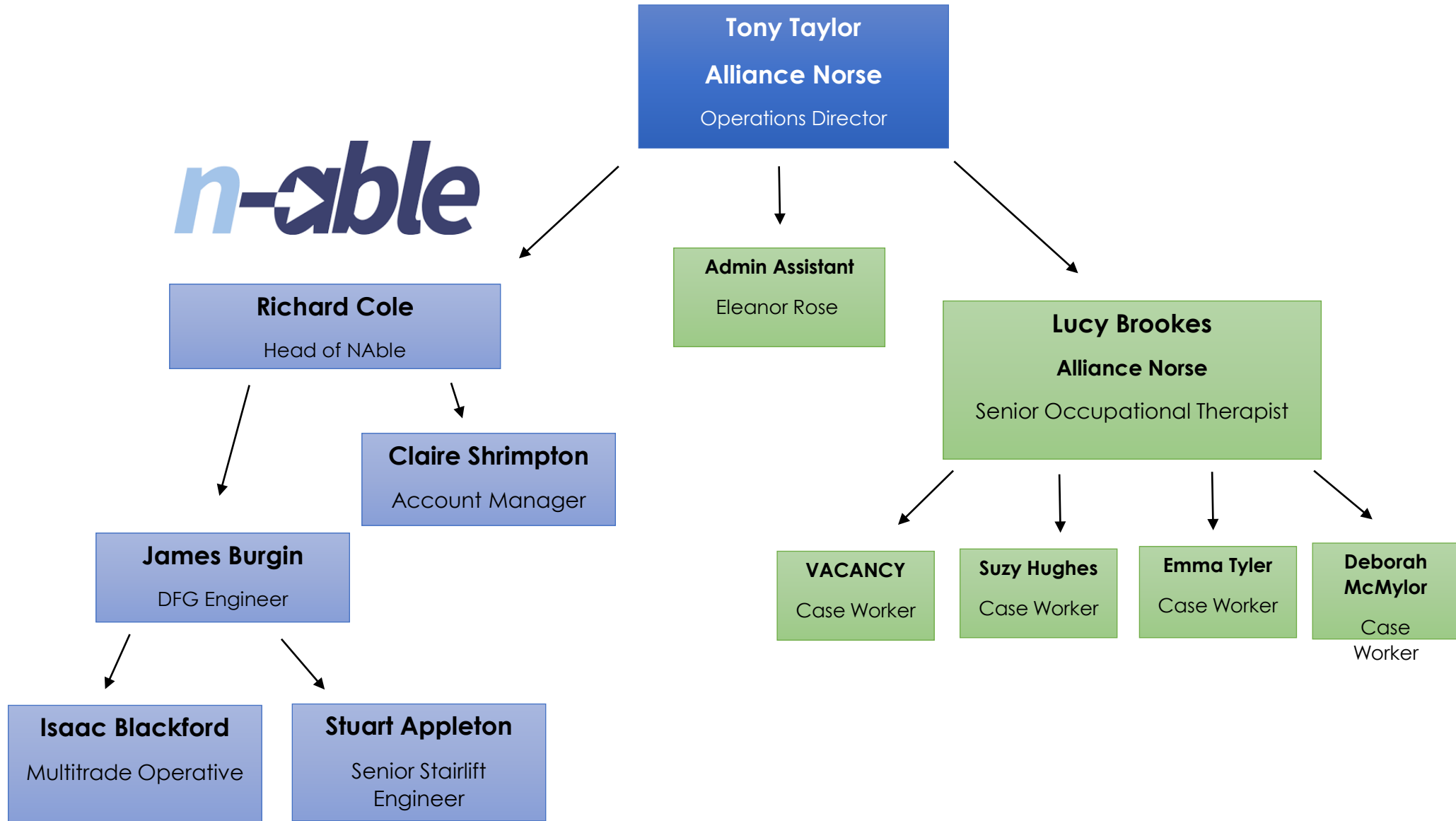
Level Access Showers/Wet Rooms  
Stairlifts – straight, curved and bespoke  
Ramps – fixed and powered  
Through-floor Lifts  
Wash/Dry Toilets  
Kitchen Adaptations  
Extensions



N-able delivers several of these services in-house and has a network of specialist sub-contractors for installations such as through-floor lifts and extensions, as well as for general building works.

**Moving the DFG activities into Alliance Nurse has provided a range of benefits:**

- greater cost-efficiency driven by higher productivity, increased purchasing power and economies of scale, along with:
- Improved service delivery, using the experience and expertise of the N-able team
- A close working relationship with both councils and their OT teams
- Greater control of services through the Alliance Nurse board
- Reduced dependence on sub-contractors



# DELIVERY OF SERVICE

N-able are commissioned by Alliance Norse. N-able are delivering works in-house as far as possible, only subcontracting if necessary. Before enlisting a third-party subcontractor, N-able will commission Alliance Norse where possible. Better value can also be achieved with a partnership rather than a contractual arrangement to deliver DFG works, with lower margins and overhead charges, and full transparency at board level.

Central procurement attracts greater discounts throughout the contract. Equipment and materials can be purchased in bulk and the use of the Group's stairlift, specialist toileting/showering and other contracts would benefit Alliance Norse and both councils.

The transfer of the DFG Adaptations services have enabled us to set up a N-able hub at Harpur Hill. This makes full use of N-able's resources, and contribute to further cost efficiency, driving down prices.

The support network of engineers ensures stability in service delivery and allows for product development.



**Staffordshire Moorlands  
Council**

Q1 Committed £220,558

Q2 Committed £571,420

Q3 Committed £624,292

Total = £1,416,270

- **239** cases in total
- **215** cases completed.
- **84** of which require land charges to be added
- **3** complaints from Your Housing Group (YHG) all in Staffs Moorlands (all resolved successfully within the Norse Complaints policy)
- The senior DFG engineer is carrying out post inspections of works and customer satisfaction surveys on behalf of N-Able (resulting in the 3 complaints above being recorded)
- 1<sup>st</sup> Audit is Scheduled for March 2024
- Compliments received **4** in total, split Between N-Able stairlift team and FDL Contractors.

# DFG Adaptations at Alliance Norse Key Performance Indicators (KPI's) High Peak Borough Council & Staffordshire Moorlands District Council

## Mitigation on SM underperformance of Q1 and Q2:

No Data transferred, those that had been had corrupt data, we had to seek details from various agencies including Staffordshire's County Cares Team, Rehab Jigsaw and Your Housing Group. This involved re-contacting clients and asking for permission for data to be sent.

Senior OT did not take up post until late August 2023. Rehab jigsaw were utilised for interim OT support.

| REF | KPI                                                             | DETAIL                                                                                                                           | TARGET          | SMDC                  |
|-----|-----------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|-----------------|-----------------------|
| 1   | Client contacted within 1 working day of referral               | Clients contacted by Administration team to book OT visit                                                                        | 1 Working Day   | 91%                   |
| 2   | Client initial OT visit within 10 working days                  | OT to visit to discuss DFG and how to move the case forward with the client                                                      | 10 Working Days | 100% New Cases        |
| 3   | Case worker to complete paperwork 5 working days after OT visit | Case worker to prepare paperwork, ensuring client meets DFG criteria, and engage other agencies if required to move case forward | 5 Working Days  | 100%                  |
| 4   | Major works to begin within 3 weeks of full DFG approval        | Works to start within 3 weeks of full approval                                                                                   | 15 Working Days | 100% client dependent |
| 5   | Sign off works within 5 working days of completion              | Full OT sign off once DFG works are completed                                                                                    | 5 Working Days  | 100% DFG Engineer     |
| 6   | Snagging to be completed within 5 working days                  | Any issues with DFG need to be rectified within 5 working days of notification                                                   | 5 Working Days  | 88%                   |



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### **The Future :**

Staffordshire Moorlands is now the focus of the Senior OT Lucy Brookes to ensure initial OT Assessments are completed, caseworkers are accompanying the OT to client assessments to ensure seamless service and to reduce further delays.

N-Able now have a full team compliment, Head of service in place, 2 x stairlift / plumbers and a senior DFG engineer and an account manager to deliver. Focus remains to complete as much work in house as possible.

The DFG/N-Able unit is fully functional and hosting DCC OT meetings on a regular basis.

All equipment is fully operational including a through floor lift for client demonstrations, Occupational Therapist encourages clients to visit the showroom before works.

N-Able are holding more than £100k stock in units to react to needs as soon as possible on DFG's this includes 20 stairlifts minimum, overhead hoists, and wash dry toilets.

The Marketing element of the DFG service is likely to start in 2024 as priority has been to deal with the backlog of outstanding grants inherited from Millbrook.



| Ref                                                                                        | KPI Description                                                                                      | Reporting Area          |            | Detail                                                                                                                                                        | Data Source | Target          | Previous | Month  | YTD    | Data Frequency | Causes of missed targets and actions to resolve                                                            |
|--------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|-------------------------|------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|-----------------|----------|--------|--------|----------------|------------------------------------------------------------------------------------------------------------|
|                                                                                            |                                                                                                      | N-Able                  | / Alliance |                                                                                                                                                               |             |                 |          | Actual | Actual |                |                                                                                                            |
| 1                                                                                          | Growth in number of referrals for DFG services                                                       | Alliance                |            | Ensure consistent levels of growth in DFG referrals, using data target areas with good response                                                               | Elms        | To be agreed    |          |        |        | monthly        | We haven't started uplifting, still dealing with backlog, new cases are coming through regularly           |
| 2                                                                                          | Deliver agreed level of public events advertising the DFG services, both local and rural             | N-Able / Alliance       |            | Number of events delivered, and number of events delivered last year                                                                                          | Elms        | To be agreed    |          |        |        | monthly        | Suspended until 2024 as agreed, funding saved                                                              |
| 3                                                                                          | Increase the number of DFG referrals below means test threshold                                      | N-Able                  |            | Monitor uptake of DFG works and target lower spend/simple DFG works that meet criteria and improve customers' home                                            | Elms        | To be agreed    |          |        |        | monthly        | All stairlifts have remained below £5k threshold, with increase in take up                                 |
| 4                                                                                          | Client contacted within 1 working day of referral                                                    | Alliance Norse          |            | Clients contacted by Administration team to book OT visit                                                                                                     | Elms        | 1 Working Day   |          |        |        | monthly        |                                                                                                            |
| 5                                                                                          | Client allocated an officer within 5 working days of referral                                        | Alliance Norse          |            | Client offered a single point of contact for this service                                                                                                     | Elms        | 5 Working Days  |          |        |        | monthly        |                                                                                                            |
| 6                                                                                          | Client initial OT visit within 10 working days                                                       | Alliance Norse          |            | OT to visit to discuss DFG and how to move the case forward with the client                                                                                   | Elms        | 10 Working Days |          |        |        | monthly        | Senior OT is booking within agreed times, been in place since 21 <sup>st</sup> August 2023.                |
| 7                                                                                          | Case worker to complete paperwork 5 working days after OT visit                                      | Alliance                |            | Case worker to prepare paperwork, ensuring client meets DFG criteria, and engage other agencies if required to move case forward. This includes means testing | Elms        | 5 Working Days  |          |        |        | monthly        | Target has been met                                                                                        |
| 8                                                                                          | Major works to begin within 3 weeks of full DFG approval                                             | N-able                  |            | Works to start within 3 weeks of full approval                                                                                                                | Elms        | 15 Working Days |          |        |        | monthly        | This target is not possible due backlog of cases, some clients requesting delays                           |
| 9.a                                                                                        | Timescales for the completion of adaptations where the case is considered to be Urgent & Simple      | N-Able                  |            | Works to be completed within 20 working days of being approved                                                                                                | Elms        | 20 Working Days |          |        |        | monthly        | Yes targets hit, minor works completed in house and within 20 days                                         |
| 9.b                                                                                        | Timescales for the completion of adaptations where the case is considered to be Non-urgent & Simple  | N-Able                  |            | Works to be completed within 40 working days of being approved                                                                                                | Elms        | 40 Working Days |          |        |        | monthly        | Cases agreed all completed with 40 days                                                                    |
| 9.c                                                                                        | Timescales for the completion of adaptations where the case is considered to be Urgent & Complex     | N-Able                  |            | Works to be completed within 60 working days of being approved                                                                                                | Elms        | 60 Working Days |          |        |        | monthly        | Yes this target has been met, if agreed with clients, Housing assn (YHG and Guinness) have delayed 3 cases |
| 9.d                                                                                        | Timescales for the completion of adaptations where the case is considered to be Non-urgent & Complex | N-Able                  |            | Works to be completed within 80 working days of being approved                                                                                                | Elms        | 80 Working Days |          |        |        | monthly        | On schedule                                                                                                |
| 10                                                                                         | Sign off works within 5 working days of completion                                                   | N-Able                  |            | Full OT sign off once DFG works are completed                                                                                                                 | Elms        | 5 Working Days  |          |        |        | Monthly        | Sign off Completed by DFG Engineer / 5 day target has been met                                             |
| 11                                                                                         | Snagging to be completed within 5 working days of notification                                       | N-Able                  |            | Any issues with DFG need to be rectified within 5 working days of notification                                                                                | Elms        | 5 Working Days  |          |        |        | monthly        | Contractors and N-Able have met this target for snagging 90%                                               |
| 12                                                                                         | Customer Satisfaction                                                                                | N-Able                  |            | As determined by feedback forms provided after delivery                                                                                                       | Elms        | 95%             |          |        |        | monthly        | No feed back form devised, but DFG Engineer feeds back any problems directly                               |
| 13                                                                                         | Complaints resolved by Alliance Norse                                                                | Alliance Norse / N-Able |            | Resolution as agreed between client and Alliance Norse                                                                                                        | Elms        | 100%            |          |        |        | monthly        | Complaints, 3 complaints logged and all resolved to client satisfaction                                    |
| <b>The following indicators relate to the the annual data report to central government</b> |                                                                                                      |                         |            |                                                                                                                                                               |             |                 |          |        |        |                |                                                                                                            |
| 14                                                                                         | Number of grants completed where the disabled occupant was aged 17 or less?                          | N/A                     |            | N/A (Central Government RFI)                                                                                                                                  | Elms        | N/A             |          |        |        | Annual         |                                                                                                            |
| 15                                                                                         | Number of grants completed in where the disabled occupant was aged 18 to 65?                         | N/A                     |            | N/A (Central Government RFI)                                                                                                                                  | Elms        | N/A             |          |        |        | Annual         |                                                                                                            |
| 16                                                                                         | Number of grants completed where the disabled occupant was of pensionable age (66 and over)?         | N/A                     |            | N/A (Central Government RFI)                                                                                                                                  | Elms        | N/A             |          |        |        | Annual         |                                                                                                            |
| 17                                                                                         | The number of grants completed for:<br>a) Veterans<br>b) BAME applicants                             | N/A                     |            | N/A (Central Government RFI)                                                                                                                                  | Elms        | N/A             |          |        |        | Annual         |                                                                                                            |
| 18                                                                                         | Number of grants completed in where the amount of grant was £5,000 or less?                          | N/A                     |            | N/A (Central Government RFI)                                                                                                                                  | Elms        | N/A             |          |        |        | Annual         |                                                                                                            |
| 19                                                                                         | Number of grants completed where the amount of grant was between £5,001 to £15,000?                  | N/A                     |            | N/A (Central Government RFI)                                                                                                                                  | Elms        | N/A             |          |        |        | Annual         |                                                                                                            |
| 20                                                                                         | Number of grants completed where the amount of grant was between £15,001 to £29,999?                 | N/A                     |            | N/A (Central Government RFI)                                                                                                                                  | Elms        | N/A             |          |        |        | Annual         |                                                                                                            |
| 21                                                                                         | Number of grants completed where the amount of grant was £30,000 or more?                            | N/A                     |            | N/A (Central Government RFI)                                                                                                                                  | Elms        | N/A             |          |        |        | Annual         |                                                                                                            |
| 22                                                                                         | Number of grants completed for owner occupiers?                                                      | N/A                     |            | N/A (Central Government RFI)                                                                                                                                  | Elms        | N/A             |          |        |        | Annual         |                                                                                                            |



|                  |                                                                                                                                                                                                                                     |                              |                              |      |     |  |        |        |  |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|------------------------------|------|-----|--|--------|--------|--|
| 23               | Number of grants completed for Registered Provider/Housing Association tenants?                                                                                                                                                     | N/A                          | N/A (Central Government RFI) | Elms | N/A |  |        | Annual |  |
| 24               | Number of grants completed for private rented tenants?                                                                                                                                                                              | N/A                          | N/A (Central Government RFI) | Elms | N/A |  |        | Annual |  |
| 25               | Number of grants completed for occupiers of a caravan or houseboat.                                                                                                                                                                 | N/A                          | N/A (Central Government RFI) | Elms | N/A |  |        | Annual |  |
| 26               | Number of homes adapted for council housing tenants (funded from your Housing Revenue Account)                                                                                                                                      | N/A                          | N/A (Central Government RFI) | Elms | N/A |  |        | Annual |  |
| 27               | The number of grants completed for landlord applications, from:<br>a) Private landlords<br>b) Registered Provider and Housing Association landlords                                                                                 | N/A                          | N/A (Central Government RFI) | Elms | N/A |  |        | Annual |  |
| 28               | Average (mean) number of working days for stage 2: from identification of the relevant works (usually receipt of an assessment/referral from an Occupational Therapist or Trusted Assessor) to submission of the grant application. | N/A                          | N/A (Central Government RFI) | Elms | N/A |  |        | Annual |  |
| 29               | Total number of grant applications submitted in the financial year.                                                                                                                                                                 | N/A                          | N/A (Central Government RFI) | Elms | N/A |  |        | Annual |  |
| 30               | Average (mean) number of working days for stage 3: from submission of the grant application to grant approval.                                                                                                                      | N/A                          | N/A (Central Government RFI) | Elms | N/A |  |        | Annual |  |
| 31               | Total number of grants approved in the financial year                                                                                                                                                                               | N/A                          | N/A (Central Government RFI) | Elms | N/A |  |        | Annual |  |
| 32               | Number of specified Grants approved;<br>Mandatory DFG<br>Assistance to Move House Grant<br>Top – Up Grant<br>Safe and Secure Grant<br>Community Adaptation Grant                                                                    | N/A                          | N/A (Central Government RFI) | Elms | N/A |  |        | Annual |  |
| 33               | Number of grants approved where payment was deferred (under section 36 of the Housing Grants Construction and Regeneration Act 1996)?                                                                                               | N/A                          | N/A (Central Government RFI) | Elms | N/A |  |        | Annual |  |
| 34               | Average (mean) number of working days for stage 4: from grant approval to the certified date of the completed works.                                                                                                                | N/A                          | N/A (Central Government RFI) | Elms | N/A |  |        | Annual |  |
| 35               | Total number of grants completed in the financial year.                                                                                                                                                                             | N/A                          | N/A (Central Government RFI) | Elms | N/A |  |        | Annual |  |
| 36               | Number of grants completed where a local land charge was placed against the property.                                                                                                                                               | N/A                          | N/A (Central Government RFI) | Elms | N/A |  |        | Annual |  |
| 37               | Number of grants approved where the applicant had an assessed financial contribution following a means test.                                                                                                                        | N/A                          | N/A (Central Government RFI) | Elms | N/A |  |        | Annual |  |
| 38               | Total value of applicants' assessed financial contributions (following a means test) for all grants approved in the financial year                                                                                                  | N/A                          | N/A (Central Government RFI) | Elms | N/A |  |        | Annual |  |
| 39               | Total number of grants completed that your authority has completed for the common parts (shared access areas) of buildings including outside areas, entrances, hallways, landings and stairwells)?                                  | N/A                          | N/A (Central Government RFI) | Elms | N/A |  |        | Annual |  |
| 40               | Number of specified Adaptations completed;                                                                                                                                                                                          | N/A                          | N/A (Central Government RFI) | Elms | N/A |  |        | Annual |  |
|                  | Stairlifts                                                                                                                                                                                                                          | N/A                          | N/A (Central Government RFI) | Elms | N/A |  |        | Annual |  |
|                  | Level Access Showers                                                                                                                                                                                                                | N/A                          | N/A (Central Government RFI) | Elms | N/A |  |        | Annual |  |
|                  | Through Floor Lifts                                                                                                                                                                                                                 | N/A                          | N/A (Central Government RFI) | Elms | N/A |  |        | Annual |  |
|                  | External Ramps                                                                                                                                                                                                                      | N/A                          | N/A (Central Government RFI) | Elms | N/A |  |        | Annual |  |
|                  | Garden Access                                                                                                                                                                                                                       | N/A                          | N/A (Central Government RFI) | Elms | N/A |  |        | Annual |  |
|                  | Internal Access                                                                                                                                                                                                                     | N/A                          | N/A (Central Government RFI) | Elms | N/A |  |        | Annual |  |
|                  | Kitchens                                                                                                                                                                                                                            | N/A                          | N/A (Central Government RFI) | Elms | N/A |  |        | Annual |  |
| Wash/Dry Toilets | N/A                                                                                                                                                                                                                                 | N/A (Central Government RFI) | Elms                         | N/A  |     |  | Annual |        |  |
| Extensions       | N/A                                                                                                                                                                                                                                 | N/A (Central Government RFI) | Elms                         | N/A  |     |  | Annual |        |  |
| 41               | Total full-time equivalent staff (FTE) of Trusted Assessors in your organisation working on DFGs?                                                                                                                                   | N/A                          | N/A (Central Government RFI) | Elms | N/A |  |        | Annual |  |
| 42               | Total full-time equivalent staff (FTE) of Occupational Therapists in your organisation working specifically on DFGs?                                                                                                                | N/A                          | N/A (Central Government RFI) | Elms | N/A |  |        | Annual |  |
| 43               | How many vacancies in the financial year did your organisation have for                                                                                                                                                             | N/A                          | N/A (Central Government RFI) | Elms | N/A |  |        | Annual |  |
|                  | a) Occupational Therapists working on DFGs                                                                                                                                                                                          | N/A                          | N/A (Central Government RFI) | Elms | N/A |  |        | Annual |  |
|                  | b) Trusted Assessors working on DFGs                                                                                                                                                                                                | N/A                          | N/A (Central Government RFI) | Elms | N/A |  |        | Annual |  |
|                  | c) Case Workers                                                                                                                                                                                                                     | N/A                          | N/A (Central Government RFI) | Elms | N/A |  |        | Annual |  |
|                  | d) Surveyors                                                                                                                                                                                                                        | N/A                          | N/A (Central Government RFI) | Elms | N/A |  |        | Annual |  |