

Asset management and housing stock optimisation: Specialist housing occupational therapist, Gloucestershire County Council

Context

Gloucestershire is a two-tier county with six district councils, each historically operating separate housing assistance policies and Disabled Facilities Grant (DFG) frameworks. The county has over 30 social housing providers of varying size. Adult social care sits with the county council whilst housing functions are distributed across the six districts, creating a complex landscape for joint working.

The specialist housing Occupational Therapy (OT) post described here represents a significant investment in dedicated housing OT expertise for the county. At the time of appointment, the post-holder became the primary dedicated housing OT resource for the area, with over 250 occupational therapy staff working within the trust. The role was created with a clear ambition: to embed OT knowledge strategically within housing systems and unlock the potential for OTs across the county to contribute meaningfully to housing outcomes.

The post-holder splits time across four functions: the DFG programme, accessible housing register development, new build consultancy, and adaptations advisory work. This service example focuses on the asset management and housing stock optimisation dimension of the role.

The challenge

Inequity of DFG policy across districts

- Separate housing assistance policies created variation in what disabled residents could access depending on where they lived
- Some districts lacked published discretionary grant frameworks, meaning residents could not always access the full range of potential solutions
- Relocation grant provision was absent in several areas, limiting options for proactive property matching

Gaps in housing stock information

- Costly adaptation projects could progress to advanced planning stages without first exploring whether suitable existing stock was available
- Without a shared categorisation system, OT assessments and housing provider stock data operated independently
- Housing options teams had limited ability to identify accessible properties through choice-based letting

Opportunity to strengthen OT reach across the system

- General OT teams had capacity to contribute more to housing outcomes with the right support and knowledge
- OT housing reports were not yet aligned with housing provider categories, limiting their usefulness in allocation decisions
- No county-wide adaptations advisory resource existed for the trust's 250 OT staff

The role

The role focuses on strategic asset management, county-wide policy development, and embedding OT knowledge within housing systems:

- Accessible housing register - Working with all social housing providers to categorise stock using specific accessibility criteria. ('ABCD' categorisation model developed from the approach implemented by some London boroughs and published by the Greater London Authority). Accessibility domains embedded as a mandatory field in the county's choice-based letting system.
- OT report alignment - Revamping housing report templates to use the same ABCD categories as providers, creating a shared language between clinical assessment and housing allocation.
- County-wide DFG policy - Developing a 'statement of intent' - a consistent policy framework adopted by all six district councils through their respective cabinet processes, including nine agreed discretionary grant offers.
- Proactive property matching - Using established housing provider relationships and the discretionary relocation grant to identify suitable existing properties as alternatives to major structural adaptations.
- Complex case clinic - Running a county-wide clinic for high-value, high-cost cases where standard pathways are insufficient. This meeting also allows for any challenging decision to be shared and for knowledge sharing between colleagues with differing levels of experience.
- Trusted Assessor programme - Leading the programme, which has grown from 3 to 16 trusted assessors, enabling appropriate delegation and freeing OT capacity for complex work.
- OT advisory and training service - Serving as the adaptations lead for 250 OT staff in the trust; delivering training on housing reports and legislation.

Benefits to the system

Housing benefits

- Consistent, published county-wide DFG policy creates equity of offer regardless of district.
- Accessible housing register enables housing options teams to identify and offer suitable properties to disabled applicants and improves understanding of how needs and environments differ.
- Accessible housing register will generate long term data on amounts of accessible housing to inform strategy.
- Aligned OT reports and housing categories improve banding decisions in choice-based letting.

Health and social care benefits

- OT knowledge embedded in housing allocation systems rather than operating in parallel.
- Trusted assessor programme creates appropriate task delegation, focusing OT expertise on complexity.
- Training and legislation awareness across OT teams strengthens the quality and consistency of housing-related practice.

Financial impact

- In one case, a £120,000 planned extension was resolved through a £15,000 adaptation to a more suitable property - saving approximately £100,000 from the DFG budget.
- The discretionary relocation grant, now available county-wide, is the key mechanism enabling this approach.

Benefits to individuals and families

- Disabled people gain access to homes that genuinely meet their needs without the disruptive delay of major structural works.

- The accessible housing register enables genuinely informed choice.
- Consistent discretionary grant provision across the county means where someone lives no longer determines the quality of support available to them.
- Aligning OT reports with housing categories means clinical assessments can directly inform allocation decisions, improving both the relevance and speed of housing matches.

Developing the role: a practical guide

Setting up the role

- Map existing DFG policies across all districts to identify variation and gaps in discretionary provision.
- Establish direct relationships with housing providers at a level of seniority sufficient to effect change - operational contacts alone are insufficient.
- Align OT housing report templates with the stock categorisation system used locally (e.g. ABCD model) before investing in wider register development.

Building a county-wide policy framework

- Develop a draft Statement of Intent collaboratively rather than prescriptively - districts are more likely to adopt a framework they have shaped than one written for them.
- Allow time for negotiation; agreeing consistent discretionary offers across multiple authorities requires compromise and sustained diplomatic effort.
- Ensure agreed policies pass through appropriate democratic processes and are published publicly to create accountability.

Essential skills and knowledge

- Working knowledge of the Housing Grants, Construction and Regeneration Act (1996) and the Care Act (2014).
- Understanding of discretionary grant frameworks and how to negotiate within them.
- Relationship-building across housing associations, district councils, and strategic housing partnerships.
- Ability to translate clinical assessment into housing system language and vice versa.

Overcoming challenges

- **Challenge:** Supporting OT teams to engage confidently with housing legislation and reports.
- **Solution:** Deliver targeted training; direct to available resources such as Care to Learn DFG basics; use the Care Act to demonstrate housing is within OT scope.
- **Challenge:** Achieving a consistent policy framework across multiple district authorities.
- **Solution:** Use a co-production model - provide a pro-forma districts can adapt rather than a policy written for them; focus on shared goals around equity of offer.
- **Challenge:** Housing providers engaging only at operational level.
- **Solution:** Identify and cultivate relationships at senior leadership level; demonstrate the value proposition - categorised stock is easier to allocate and OT involvement reduces tenancy failure.
- **Challenge:** Relocation grants not available in all areas.
- **Solution:** Use county-wide policy development to standardise discretionary provision; build the financial case using specific documented examples of cost avoidance.

Demonstrating impact

- Document planned adaptation costs avoided through property matching (planned spend vs actual spend vs saving).

- Track number of housing providers with categorised stock in the choice-based letting system.
- Monitor growth of trusted assessor programme and cases handled.
- Record number and type of discretionary grants awarded, including relocation grants.
- Capture OT training attendance and legislation awareness across the wider team.

Top tips for managers

- Protect strategic time - ring-fence capacity for register development and policy work alongside operational advisory responsibilities.
- Start with policy - a county-wide housing assistance framework creates the platform for everything else, including relocation grant use.
- Align your systems early - updating OT report templates to match housing categorisation is a practical, early win with immediate impact on allocation quality.
- Build legislative literacy across the whole team – OTs in diverse roles can contribute more to housing conversations with working knowledge of the relevant legislation.
- Connect the financial case to real local examples - a documented £100,000 saving is more persuasive than generic statistics.