

Housing needs assessment and allocation housing occupational therapist: private practice

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Context

This case study describes an independent housing OT service developed in response to a gap that exists across both statutory and private sectors: clients with detailed clinical recommendations for a housing move but no active support to make that move happen. The service has grown steadily over eight years, driven by consistent outcomes and word of mouth, and now operates as part of a multidisciplinary housing consultancy that includes estate agents, architects and building surveyors.

The OT behind the service brings 20 years of experience, including 12 years in local authority older people and housing services before moving into independent practice. This combination of statutory and private sector experience informs an approach that bridges clinical assessment with practical housing market navigation – a gap that statutory services rarely have the capacity or remit to fill.

The service supports clients with a wide range of disabilities, illnesses, and catastrophic or personal injuries, and works alongside professional deputies, case managers and legal teams to identify and secure suitable housing.

The challenge

The gap between recommendation and reality

- Clients frequently had detailed OT reports recommending a housing move, but no one was actively supporting the search itself.
- Families were left to interpret complex clinical recommendations in the context of a difficult and often inaccessible housing market.
- Legal teams commissioning property searches sometimes had no accompanying assessment of what the client's housing needs actually were, creating a disconnect between instruction and outcome.

Private landlord resistance

- Private landlords who are unfamiliar with disability legislation or the adaptations process are often reluctant to agree to changes, even when these are minor or fully funded.
- Covert discrimination is common – properties withdrawn from the market without explanation following disability-related enquiries, or landlords failing to respond once aware of a client's needs.
- This resistance causes significant delays and distress for families who are already under pressure.

Limited accessible stock

- Suitable rental properties, particularly accessible or adaptable ones, are in short supply in many areas.
- Searches frequently need to cover large geographical areas to identify even a small number of viable options, adding time and pressure for families already in crisis.

The role

The role bridges clinical assessment with property market navigation, combining OT expertise with active housing search and negotiation:

- Housing needs assessment - Carrying out thorough assessments of individuals' housing and adaptation needs, ensuring any property search is grounded in a clear clinical picture.
- Property search management - Translating assessment findings into practical search criteria and actively engaging with estate agents, letting agents, landlords, housing associations and developers to identify suitable options.
- Landlord negotiation - Working directly with private landlords to discuss adaptations, explain funding routes, and address concerns about risk or process.
- Legal and deputy work - Accepting instructions from legal teams, case managers and professional deputies, providing both assessment and search services within medico-legal and Court of Protection contexts.
- Multidisciplinary collaboration - Operating within a broader housing consultancy alongside estate agents, architects and building surveyors, enabling a joined-up response to complex housing needs.
- Family and client support - Providing clear guidance and support at each stage of the process, reducing the stress and uncertainty that families experience when navigating the housing market alone.

Benefits to the system

Housing benefits

- Active engagement with the private rental and purchase market opens up options that clients and families would struggle to access independently.
- Direct negotiation with landlords and developers on adaptations creates solutions that would otherwise be blocked by unfamiliarity or reluctance.
- Embedding OT assessment within a multidisciplinary housing consultancy creates a more joined-up response than clinical and housing professionals working in isolation.

Health and social care benefits

- People move into housing that properly supports their mobility, sensory or cognitive needs, leading to improved safety, greater independence and better health outcomes.
- Reduced need for care and support where housing is genuinely matched to need.
- Legal and deputyship teams receive both assessment and search support, reducing delays in complex cases.

Financial impact

- Appropriate housing matches reduce the likelihood of costly re-housing, failed tenancies or escalating care needs resulting from unsuitable accommodation.
- Early and thorough assessment prevents property searches that lead to unsuitable outcomes, saving time and legal costs in complex cases.

Benefits to individuals and families

- Homes are better matched to individuals' mobility, sensory, and cognitive needs, enabling people to live more safely and comfortably.
- Improved housing suitability leads to greater independence in daily living and reduced reliance on others for support.
- Better living environments contribute to improved physical health, wellbeing, and overall quality of life.
- Families facing barriers such as housing delays, landlord resistance, or limited accessible housing options benefit from a clearer and more supported pathway to suitable accommodation.
- Individuals are empowered to play a greater role in decisions about where and how they live.

- Families feel more informed, supported, and confident throughout the housing process.
- Advocacy and direct engagement with landlords can increase access to private rented accommodation for disabled individuals.
- Concerns about adaptations, funding, and perceived risks are addressed proactively, helping to retain housing options that might otherwise be withdrawn.
- Individuals and families benefit from a more coordinated approach that bridges the gap between assessment, housing search, and successful move-on outcomes.

Developing the role: a practical guide

Setting up the role

- Be clear about the gap you are filling: the service works because it bridges clinical assessment and active housing search – both elements are essential and neither is sufficient alone.
- Build relationships with estate agents, letting agents and housing associations before you need them; these relationships are what make the search effective.
- Consider operating within or alongside a multidisciplinary team that includes architects, surveyors and legal professionals – complex housing needs rarely only require clinical expertise.

Working with private landlords

- Develop a clear, accessible explanation of the adaptations process and relevant legislation that can be shared with landlords early in any conversation.
- Address concerns about funding, risk and reinstatement directly and proactively – many landlords are not opposed in principle but are unfamiliar with the process.
- Document cases where landlord engagement has unlocked a suitable property, to demonstrate the value of this approach.

Essential skills and knowledge

- Ability to comprehensively assess housing needs, including understanding of tenure, planning, and what types of works can and cannot be carried out in different property types.
- Working knowledge of disability legislation as it applies to private landlords, including the Equality Act 2010.
- Ability to translate clinical assessment findings into practical property search criteria.
- Confidence operating in housing, legal and commercial settings alongside professionals from other disciplines.

Overcoming challenges

- **Challenge:** Private landlords reluctant to agree to adaptations or failing to respond after disability-related enquiries.
- **Solution:** Engage early with a landlord information pack explaining the adaptations process, funding routes and legal framework; frame adaptations as low risk and address concerns directly before they become blockers.
- **Challenge:** Limited accessible stock in high-demand areas.
- **Solution:** Be prepared to search across wider geographical areas; build relationships with housing associations and developers as well as private landlords to access a broader range of options.
- **Challenge:** Legal teams commissioning searches without accompanying assessment.
- **Solution:** Establish a clear service offer that combines assessment and search; educate legal teams and case managers about why assessment must underpin any property search to avoid unsuitable outcomes.

- **Challenge:** Families overwhelmed by the process and struggling to engage.
- **Solution:** Provide clear guidance at each stage; take on the direct engagement with agents and landlords so families are supported rather than left to navigate unfamiliar systems alone.

Demonstrating impact

- Record time from instruction to successful housing outcome for each client.
- Document cases where active landlord negotiation unlocked a property that would otherwise have been unavailable.
- Track reduced care and support needs following a successful housing move.
- Capture client and family feedback on the difference the service made to their experience and outcomes.
- Note cases where combined assessment and search prevented a unsuitable housing outcome.

Top tips for managers

- Recognise that the gap between clinical recommendation and housing outcome can be significant – having the right report is not the same as having the right home.
- Consider how OT expertise could be deployed in property search and negotiation, not only in assessment.
- Develop a landlord engagement resource that OTs can use to open conversations with private landlords.
- Build relationships with legal teams, case managers and professional deputies – these networks generate referrals and create opportunities for OTs to contribute in complex cases.
- Invest in OT knowledge of the private housing market, tenure types and disability legislation – this knowledge is currently underdeveloped in the profession and limits what OTs can offer.