



**FOLD**

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# THE “STAYING PUT” SERVICE AND THE HOUSING EXECUTIVE GRANTS SCHEME

A STEP BY STEP GUIDE

**Client name** \_\_\_\_\_

**Address** \_\_\_\_\_  
\_\_\_\_\_

**Grant ref Number** \_\_\_\_\_

*For information telephone : 028 90 428314*

## Introduction

The Staying Put service provided by Fold Housing Association is intended to assist the elderly and/or people with disabilities by offering them free practical advice and support to repair or adapt their homes through the Housing Executive Grants Scheme.

Staying Put acts in support of the grants applicant throughout the grants process, helping them to complete grant applications, and assisting with technical advice and support.

The purpose of this guide is to set out the basic steps required when making a grant application to the Housing Executive and the support that Staying Put can offer grant applicants.

Staying Put is a free advisory/support service. The information contained in this booklet is deemed correct at time of issue.

Fold Housing Association cannot accept any liability for changes in procedures/legislation introduced by other organisations involved in the Housing Executive grants process that may have an effect on your grant.

Should you require further clarification please contact your local Housing Executive Grants office. Details of useful contacts are listed at the back of this booklet.

## **NIHE GRANT PROCESS**

- Step 1** *Preliminary enquiry to the Housing Executive (Occupational Therapist)*
- Step 2** *The Housing Executive Visit*
- Step 3** *Schedule of work issued by the Housing Executive (Test of Resources)*
- Step 4** *Fold Staying Put Visit*
- Step 5** *Sketch plan agreed by the Housing Executive/Occupational Therapist (If applicable)*
- Step 6** *Working drawings prepared and agreed by Building Control/Planning Service (where applicable)*
- Step 7** *Documents submitted to Building Contractor for Estimate, Certificate of Title, Mortgagee's Consent, Landlord Consent*
- Step 8** *Formal application made to the Housing Executive*
- Step 9** *Grant approval received*
- Step 10** *Work on site/Work complete*

## Step 1

Make Preliminary grant enquiry to your local Housing Executive grants office hereafter referred to as **Housing Executive**.

An assessment must be carried out by your Occupational Therapist before making an application for a Disabled Facilities Grant to the Housing Executive.

If you are applying for a **Disabled Facilities Grant** your Occupational Therapist will visit and assess your needs; the resultant recommendation will be forwarded to the Housing Executive for consideration.

**The Housing Executive will not accept an application for a Disabled Facilities Grant without a recommendation from your Occupational Therapist.**

## NOTES

## Step 2

The **Housing Executive** will carry out an inspection of your home to determine what work is required.

If you have only applied for a Disabled Facilities Grant the Housing Executive may still determine that other non-Disabled Facilities Grant associated works will need to be carried out to your property. This will be required to bring your house up to the required fitness standard.

The Grants Officer should advise you about this when on site.

### NOTES

### Step 3

The **Housing Executive** will issue you with a list of work to be carried out. This is called a works schedule. This will include all works that will be grant aided and may include repairs and disabled adaptations.

The pack will also include requests for key documents which will be required to make your Formal Grant application.

Key Documents will include: Application Form, Test of Resources (see below), Proof of Title/Mortgagee's Consent, Estimate. Approved plans, Building Control and Planning Permission may also be required.

The Housing Executive will carry out a means test calculation to determine your contribution (if any) towards the cost of the work. This is called a Test of Resources.

#### **Test of resources.**

***This test enables the Housing Executive to determine your contribution to the overall cost of the work. Your grant entitlement will be the approved cost of the work eligible for grant less your assessed contribution.***

**Note: Children are exempt from means testing for Disabled Facilities Grants.**

**Should you require further clarification on the Test of Resources, please contact your local Housing Executive Grants Office.**

#### **NOTES**

## Step 4

**Staying Put visit.** Should you require assistance with your application a Staying Put Advisor will discuss your needs and provide help if required.

**This will be your first contact with Fold's Staying Put Service.**

**We will explain:**

- **The Housing Executive grant process.**
- **Our role within that process.**
- **The work to be carried out to your home.**
- **Indications of costs & time scales where possible.**
- **Assist you in obtaining/completing the necessary paperwork to make your Housing Executive Grant application.**

**NOTES:**

## Step 5

**Architects and Plans.** Plans relating to the work schedule may take the form of Sketch plans and/or Working drawings which should be prepared by a suitably qualified Architect or Technician.

**Sketch plans:** - These have two functions:

- In the case of small adaptations such as bath/shower conversions, etc., a sketch showing the existing and proposed layout may be adequate to meet Housing Executive/Occupational Therapist requirements.
- For larger schemes an initial design for agreement by you the client, Housing Executive and Occupational Therapist is necessary. These sketches may form the basis for the working drawings (see step 6). Larger schemes will most likely require statutory approvals i.e. Building Control, Planning Approval etc. Please note that Planning Approval is unlikely to be completed in less than 3 months and may take longer.

Your Architect should advise you on this and of any costs and fees involved.

It is strongly recommended that you have a sketch plan of your proposals agreed by the Housing Executive/Occupational Therapist before proceeding to the next stage of your grant application.

**Staying Put can assist you select an architect to prepare your plans.  
The contract for the plan drawing service is between you – the client – and the architect.  
You are strongly advised to ensure that you**

- (a) know what this service will cost**
- (b) when the architect expects payment.**

### NOTES:

## Step 6

**Working drawings** (see Step 5) includes all details necessary for submission and approval by statutory organisations such as Building Control/Planning Authorities etc.

**All plans, including sketch plans, must be drawn accurately and to scale otherwise application may be delayed or fail.**

**The Architect/Technician** should agree with you the cost of preparing your plans before proceeding with the work. You should not give permission to proceed if you are not satisfied with the estimated cost of this service or the scheme proposed.

You should retain all invoices and receipts for this work as the Housing Executive will make an allowance against plan drawing costs.

**The Housing Executive contribute to these costs; however there is no guarantee that all your Architect's fees will be refunded.**

### NOTES:

## Step 7

**Contractors Estimates:-** You must include an estimate of costs for works being carried out on your home as part of your grant application. The Housing Executive will provide you with a list of approved contractors.

It is important that the building contractor is given all the appropriate information to allow him to cost your work accurately i.e. approved plans, Housing Executive schedule, specialist reports, specifications etc.

**Fold can assist you in appointing a contractor (from an approved list) to provide you with an estimate.**

### **Other documents that may be required to complete your grant application:**

**Certificate of Title:-** Provides proof of ownership of the property which you intend to adapt or renovate.

**Landlord consent:-** If you are a tenant in the house you intend to adapt it will be necessary to obtain permission from your landlord.

**Mortgagee's consent:-** If you have a mortgage or loan against your property it may be necessary to receive permission from the company that holds your deeds.

*(See Northern Ireland Housing Executive guidance notes for more information).*

**Fold can advise/assist you when obtaining these documents.**

### **NOTES:**

## Step 8

**Grant Application.** You should now have all the necessary documentation to make your grant application. These documents should be submitted to the Housing Executive grants office for approval. Your application should include:

- Completed Grant Application Form
- Certificate of Title
- Mortgagee's consent/ Landlord consent (where applicable)
- Contractors Estimate
- Building Control/Planning approved plan (where applicable)

**Staying Put is authorised to make the grant application to the Housing Executive on your behalf.**

### NOTES:

## Step 9

**Grant Approval.** This is issued by the **Housing Executive.** It will give you details of your grant award and how it has been calculated i.e. the approved cost of the works, plan drawing/professional costs, client contribution etc. On receipt of this document you can proceed with the works.

You should also at this time receive your approved schedule of work. We strongly advise you to check that the work listed on this new document corresponds to the original schedule as explained at Step 3.

As some time may have elapsed since you made your grant application (see step 8) it is advisable to contact your contractor to clarify:-

- *Is the original price still valid?*
- *Is he still available to carry out your work?*
- *Does his estimate cover all items on the most recent schedule?*
- *Can you meet any cost differences between the cost of the work and the approved grant?*

Before proceeding with the works it is necessary to put in place a **warranty bond.** *(This is only required for Disabled Facilities Grants and Renovation grants if the costs exceed £5000). You should complete this document with the preferred contractor.*

A warranty bond is an insurance backed guarantee. Should for any reason the contractor not complete your work then the warranted scheme can intervene and assist you in completing the outstanding work.

**Staying Put can contact the contractor on your behalf.**

**It is not always possible to source a contractor to carry out the work for the Housing Executive grant amount. Should the contractor be busy with other works, delays in commencing your work may occur. (See Additional Notes).**

### NOTES:

## Step 10

### **Works in progress/works complete.**

When all of the above has been agreed, the contractor can proceed on site.

It is essential that the contractor has all relevant and most recent schedule of works, plans etc.

**Staying Put's role does not include the supervision of contractors when your work has begun.**

**However, if you encounter difficulties or should you have any queries while the work is on site, please do not hesitate to contact our technical department who will endeavour to assist/advise you.**

On completion the work will be inspected by the Housing Executive grants office, Occupational Therapist (where applicable), Building Control etc.

The Housing Executive grants office can advise you of the documentation required to allow your grant to be paid.

**Should you wish Staying Put can assist/advise you when obtaining this information.**

### **NOTES:**

## Additional Notes

### Step 3 – Test of Resources

This test is calculated by the Housing Executive and is based on your income. It is possible that a further contribution may be required due to contractor's estimates being higher than the Housing Executive grant allowed.

	<b>£</b>
<b>For Example: Expense for eligible works</b>	<b>2850.00</b>
<b>Fees (Architect etc)</b>	<b><u>60.00</u></b>
<b>Total Approved Cost</b>	<b>2910.00</b>
<b>Applicant's contribution</b>	<b>0.00</b>
<b>Total grant approved (by Housing Executive)</b>	<b><u>2910.00</u></b>
<b>Contractor's Estimate</b>	<b><u>3400.00</u></b>
<b>Applicant's contribution</b>	<b>490.00</b>

**Because the contractor's cost is higher than the grant amount, the applicant would have to pay the difference – in this instance £490.00.**

### Step 5/6 – Architect's Plan Drawing Fees

The Housing Executive will contribute to these costs should a plan be deemed necessary and requested by them. There is no guarantee that all your fees will be refunded or the total cost for your plans be allowed by the Housing Executive. Should you not complete your grant work then it is unlikely that your architect's fees will be refunded. The Housing Executive will assess individual circumstances and advise you.

### Step 9/10 – Additional Works/Costs

Additional works may be necessary for a number of reasons. The following are some examples:

**Unforeseen work.** This normally occurs while works are on site and a problem arises that had not been anticipated. Common areas for unforeseen work are: Foundations; structural requirements (i.e. beams, walls etc.); specialist work (dry rot, woodworm, wet rot, etc.).

When unforeseen work is detected it is important that the Housing Executive is informed immediately as additional grant funding should be available to help cover these costs. It may also be necessary to contact Building Control for approval. If in doubt, contact Staying Put's Technical Advisor for advice.

**Occupational Therapist or Housing Executive ask for items to be added.**

This can occur on Disabled Facilities grants, as the Occupational Therapist requests additional work to be carried out to your home. This work will normally be grant-aided.

**In the above examples there is no guarantee that the Housing Executive grant will meet the contractor's costs for any additional works.**

**Additional work requested by you the client.** Should you request the contractor to carry out additional work to your home or require a higher specification product that is not covered by the Housing Executive grant.

It is the responsibility of the client to agree:

- (a) Additional work requested by the client and/or
- (b) Products of a higher specification that is not grant-aided.

You are advised to:

- (a) seek an estimate from the contractor before proceeding
- (b) agree what work you want done.

## Useful names and telephone numbers to remember!

### Fold Staying Put

Housing Advisor   
Telephone Number:

Technical Advisor   
Telephone number:

### Housing Executive Grants

Area   
Grants Officer   
Telephone number:

### Occupational Therapist

Name   
Telephone number:

### Building Contractor

Name   
Telephone number:

### Building Control

Name   
Telephone number:

*Staying Put is a service provided by Fold Housing Association to help older and/or people with disabilities who either own or privately rent their homes. We offer practical assistance and support to help repair, adapt or improve their homes through the Northern Ireland Housing Executive Grant Scheme.*

*We will provide you with a high standard of support and advice throughout your grant application.*

*However we have no influence on other organisations and statutory bodies involved in the process and therefore cannot guarantee availability or speed of service for these groups when obtaining information/services in connection with your grant application.*

## **Fold Housing Association**

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