1 PURPOSE

1.1 To consider a request from Health and Housing Committee for Policy and Finance Committee to consider and approve the financial implications of the proposed changes to the Disabled Facilities Grants Discretionary Grant Policy.

2 BACKGROUND

2.1 Service committees manage their services within the budgets agreed at the beginning of the financial year. The budget was approved by Special Policy and Finance Committee on 4 February 2020 and by Full Council on 3 March 2020.

2.2 Any revenue or capital expenditure over and above what has already been approved must be agreed by Policy and Finance Committee.

3 HEALTH AND HOUSING COMMITTEE 1 OCTOBER 2020

3.1 Health and Housing Committee considered a report submitted by the Director of Economic Development and Planning (attached at Annex 1) which gave details of proposed changes to the Disabled Facilities Grants Discretionary Grant Policy.

3.2 Financial implications of the proposed changes to the policy were not provided to the Health and Housing meeting held on 1 October, and so the changes were approved subject to Policy and Finance Committee receiving details of the financial implications.

3.3 A summary of the forecast financial impact is provided below.

<table>
<thead>
<tr>
<th>Year</th>
<th>DFGs Budget £</th>
<th>DFGs Expenditure and Commitments £</th>
<th>Estimated additional cost from increased discretionary grant levels (ANNEX 2) £</th>
<th>DFGs Expenditure and Commitments plus additional cost from increased discretionary grant levels £</th>
<th>Is the proposed change affordable?</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019/20 Actual</td>
<td>706,490</td>
<td>489,822</td>
<td>28,600</td>
<td>518,422</td>
<td>YES</td>
</tr>
<tr>
<td>2020/21 Estimate</td>
<td>766,980</td>
<td>158,804**</td>
<td>108,900</td>
<td>267,704</td>
<td>YES</td>
</tr>
</tbody>
</table>

** 2020/21 DFGs Expenditure and Commitments is the position as at the end of October 2020 rather than the full year position.

3.4 As can be seen there is likely to be net nil financial impact from the proposals in the current financial year 2020/21, because the estimated increased costs in discretionary grants approved are likely to be contained within the 2020/21 Disabled Facilities Grants budget available. Also, as a guide, it is estimated that the change would have been affordable if it had been brought in for 2019/20, which is the last full financial year not affected by Covid-19 restrictions (Covid-19 has significantly reduced the numbers of Disabled Facilities Grants assessed, approved and completed so far in 2020/21).
3.5 It should be noted that the above assessment is based on the previous and current levels of discretionary grant support available to Disabled Facilities Grants applicants and there may be an increase in discretionary grant applications following the introduction of higher maximum discretionary grant levels.

3.6 In addition, the budgets available for Disabled Facilities Grants can fluctuate yearly, because they are solely dependent on external funding allocations from MHCLG and Onward Homes, and the numbers and values of mandatory and discretionary Disabled Facilities Grants applications received can also fluctuate each year.

3.7 In this context, the numbers and values of discretionary Disabled Facilities Grants approved in future must continue to be closely monitored so that:

- the values approved in-year do not prevent or delay any Mandatory Disabled Facilities Grants applications being approved in-year; and
- all grant approval commitments in-year are confined to the yearly Disabled Facilities Grants budget available.

3.8 To achieve this:

- the Disabled Facilities Grants discretionary grant policy is clear that at any point the offer of discretionary grants can cease should the budget not support continuation; and
- Housing continue to monitor the mandatory and discretionary Disabled Facilities Grants approvals and budgets in line with the processes set down in Annex 3.

3.9 The resolution for this item at Health and Housing Committee was:

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'RESOLVED: That Committee
1. agree to the proposed changes to the DFG policy as outlined in the report, and that they be subject to a 6-week period of consultation, following which, subject to there being no issues of significance raised, delegated to the Director of Economic Development and Planning in consultation with the Chair of Health and Housing committee the policy be adopted and operational as soon as practicable thereafter; and
2. ask the Policy and Finance committee to consider and approve the financial implications of these proposed changes to the DFG policy.
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4. RECOMMENDED THAT COMMITTEE

4.1 Approve the proposed changes to the DFG policy from a financial perspective on the grounds that:

- the estimated additional costs in 2020/21 are likely to be contained within the 2020/21 Disabled Facilities Grants budget available; and
- the Disabled Facilities Grants budget will continue to be monitored so that all grant approval commitments in-year are confined to the yearly Disabled Facilities Grants budget available.
1 PURPOSE

1.1 To revise the private sector housing policy and the disabled facilities grant offer to households.

1.2 Relevance to the Council’s ambitions and priorities

- Community Objectives
- Corporate Priorities
- Other Considerations

To address the housing needs of older and disabled occupants across the borough.

2 BACKGROUND

2.1 The current discretionary disabled facilities grant policy was adopted in January 2018. A copy can be viewed using the following link.

https://www.ribblevalley.gov.uk/downloads/file/11417/discretionary_disabled_facilities_grant_policy

This introduced 3 key policy changes as to how disabled facilities grants (DFG) were being delivered, namely:

- To optimise the use of the Council’s DFG allocation and introduce a non-means tested grant- Ribble Valley Adaptation Grant (RVA). Each year a significant number of cases fail the means test and the individuals in need of adaptations were not organising the necessary adaptations. Therefore, the new policy introduced the provision of a non-means tested discretionary grant. A £5,000 maximum grant for one item as prioritised by the Occupational Therapist (OT).

- Introduction of top up grants above the mandatory grant maximum of £30,000. Until January 2018 the maximum grant was £30,000. The new grant policy allowed a £10,000 top up grant. In the past two years the use of top up grant has been approved in 3 cases.

- Introduced a 10% admin fee for all DFG’s and RVA’s.

2.2 This grant policy has operated for two years. Members approval is sought to introduce changes to the Policy which will be subject to a six week consultation period. The changes to the existing Policy proposed are as follows:

- To increase the Ribble Valley Adaptation Grant to a maximum of £7,000 per application and to amend the policy to one item and associated works as recommended by the OT. This is on the basis that the average cost of individual items have increased and quite regularly the current level of RVA is not meeting
the full cost of the 1 item. This has led to households not going ahead with adaptations and has resulted in delays.

- To increase the top up grant to from £10,000 to a maximum £25,000. This will only relate to adaptations where the value of the total cost of the works is over the mandatory grant. Of the 3 top up grants approved last year, all of them went above the grant maximum and the cost of works exceeded the discretionary top up. This is due to the costs of works required to make ground floor bedroom and bathroom facilities and the specialist equipment required. This resulted in the individual applicants seeking funding from other sources. In all of these cases the total value of the works was between £50,000 and £60,000. The applicants were assisted in making an application for hardship funds from LCC and/or charitable funding. This can cause significant delay in the works starting and can result in works having to stop part way through construction which can have an impact incurring further costs. If additional funds are not identified the project may be closed. Ultimately, the responsibility for ensuring appropriate housing is available would then fall on the Council as local housing authority.

- That a 10% admin fee continues to be charged where technical support is used. 5% admin fee for equipment only and no admin charge when there is no technical input.

2.3 The attached grant policy at appendix 1 sets out the proposed policy which will be consulted on with all relevant partners. Any feedback will be reported to Chair of Health and Housing and the Director of Economic Development and Planning for consideration.

3 ISSUES

3.1 There are currently 4 grants in progress that have works that will exceed the grant maximum. This can be identified within the grant report in Part 2. Three out of four of these grants are paediatric recommendations and in all cases the grant is for creating ground floor bedroom and bathroom facilities for the disabled child/occupant.

3.2 The costs of creating a ground floor extension large enough to provide turning space for wheelchairs in both bedroom and bathroom and all equipment with specialist equipment means the value of the contract work is often exceeding £40,000.

3.3 Therefore, it is recommended that the top up is increased to a £25,000 discretionary top up to enable these types of scheme to be delivered. This means the maximum grant that can be awarded will be £55,000 which is considered sufficient to address the shortfalls being experienced in a small number of the more complex projects.

4 RISK ASSESSMENT

4.1 The approval of this report may have the following implications

- Resources – The DFG budget has been significantly increased and continues to be underspent annually. Commitment is reliant on OT recommendations being received and the works that are recommended. Delivery can also be delayed where time and resource is expended to resolve funding issues. The DFG budget is monitored on a monthly basis and at any point the offer of discretionary grants can cease should the budget not support continuation.

- Technical, Environmental and Legal – The Regulatory Reform Order allows LA’s to develop their own private sector grant policy and decide on a DFG grant award
that best suits the needs of the borough. The proposed revision is based upon the experience the council has had since the introduction of the policy.

- Political – Important we make best use of the Better Care Fund and deliver the best service to vulnerable and elderly households in the borough.

- Reputation – Important the Council makes best use of the funding available and the opportunity to enable households to remain independent and at home.

- Equality & Diversity – Important the housing needs of all residents in the borough are addressed.

5 RECOMMENDED THAT COMMITTEE

5.1 Agree the proposed changes to the DFG policy and that they be subject to a period of consultation, following which subject to there being no issues of significance raised, and in consultation with the Chair of Health and Housing Committee the policy be adopted and operational from 1 December or as soon as practicable thereafter.

RACHAEL STOTT NICOLA HOPKINS
HOUSING STRATEGY OFFICER DIRECTOR OF ECONOMIC DEVELOPMENT
AND PLANNING

For further information please ask for Rachael Stott, extension 3235.
Proposed amended Discretionary Disabled Facilities Grant Policy

Housing Grants, Construction and Regeneration Act 1996

The Regulatory Reform (Housing Assistance) (England and Wales) Order 2002

Reviewed September 2020
1. Introduction

Housing is a key determinant of health and poor housing is directly linked to poor health. This disabled facilities grant policy details the financial assistance that the Council aims to provide to support improvements to enable disabled occupants to remain in their own home through the use of the Better Care Fund allocation.

The Council is required to adopt a Discretionary Disabled Facilities Grant Policy which sets out how it intends to use its discretion to develop schemes having regard to the needs of the Borough, the availability of funding, and the Council’s priorities.

This Discretionary Disabled Facilities Grant Policy forms part of the Council’s over-arching Housing Strategy. This policy was first adopted January 2018 and has proved to be successful in supporting the householder to maintain independent living.

2. Aims and priorities

Improving the housing conditions across the Borough will support improvements in health and well-being as well as having a positive impact on the quality of local neighbourhoods, particularly for those residents who are vulnerable and cannot access their homes and gardens due to their disability.

This policy sets out in greater detail our offer to disabled occupants and their families. It also details to local Councillors, local residents and our stakeholders how we will work to maintain and improve the provision of adapted property across the borough.

Appendix 1 details the assistance schemes that the Council intends to offer during the life of this policy and sets out specific eligibility criteria relating to each scheme.

The health and well-being of disabled and vulnerable residents is often compromised due to their homes not meeting their specific needs, and this can impact on their ability to live with dignity within their homes.

3. Disabled Facilities Grants

The Council has a statutory obligation to administer mandatory Disabled Facilities Grants (DFGs) to provide aids and adaptations to enable disabled residents to live independently within their own homes.

The eligibility requirements, scope of works, and the general requirements governing mandatory DFGs are prescribed and the Council is unable to deviate from these requirements.

The Council is required to administer Disabled Facilities Grants to all eligible applicants irrespective of their tenure, and the Council aims to work collaboratively with housing associations to fund aids and adaptations within social housing wherever possible to ensure everyone has the same opportunity to have their home adapted.

In some cases the use of Disabled Facilities Grants is able to assist with reducing the length of stay in hospital and facilitating a quick return to home. This also reduces the demand for residential care placements.

4. Discretionary Top-up Grant

The Council have agreed to use discretionary powers to provide in eligible cases a top-up award in addition to the £30,000 mandatory grant. In more complex cases the work required often goes over the mandatory grant award maximum. This top-up of a maximum of £25,000 will assist to provide all the required work identified by the Occupational Therapist. In addition
to this, the 10% administration fee will also be eligible for the discretionary grant. The additional £25,000 can only be accessed where the full £30,000 of mandatory grant has been utilised. The discretionary element will be registered as a land charge if the works include alterations to the property on owner occupied properties and, in the event the property is sold within a 10 year period, the Council require repayment. * Please see exception policy. In exceptional circumstances where more than one DFG is approved, more than £25,000 may be registered.

The availability of the top-up grant is at the discretion of the Council and subject to availability of funding.

5. Ribble Valley Adaptation Grant

For some households the means testing requirement makes them not eligible for assistance. This often means the works are not carried out or don’t fully meet the person needs. The Ribble Valley adaptation allows a grant to provide 1 item and the associated works to address the needs of the applicant as recommended by the Occupational Therapist up to a maximum of £7,000. This will fund the cost of the 1 item prioritised by the Occupational Therapist. Where the RVA is providing the calculated contribution the applicant will still be eligible for further items to be provided as a DFG. The applicant can then choose as to whether they fund the remaining works themselves. The full grant will be registered as a land charge if the works include alterations to the property on owner occupied properties and, in the event the property is sold within a 10 year period, the Council require repayment. * Please see exception policy.

The availability of the Ribble Valley Adaptation Grant is at the discretion of the Council and is subject to the availability of funding.

6. Review of the policy

The ability to provide Discretionary Top up and Ribble Valley Adaptation grants will be reviewed quarterly with regard to financial capacity to award the discretionary element. Mandatory grants will take priority.

The provision of Discretionary Top up and Ribble Valley Adaptation DFGs will be reported to each Health and Housing Committee.

The policy will be reviewed annually by the Health and Housing Committee.
### Priority 1 – Assist disabled and vulnerable residents to remain in their homes through the provision of aids and adaptations

<table>
<thead>
<tr>
<th>Scheme</th>
<th>Assistance Available</th>
<th>Purpose</th>
<th>Scope of Assistance</th>
<th>Eligibility</th>
<th>Scheme Conditions</th>
</tr>
</thead>
</table>
| **Mandatory Disabled Facilities Grant**    | Maximum assistance per application: | Assistance to: Meet the Council’s statutory obligation to assist disabled residents to live independently in their homes | Aids and adaptations to:  
a) be recommended by an Occupational Therapist;  
b) meet the regulations governing eligibility for works, including:  
   ▪ adaptations to aid access into and around the property;  
   ▪ works to ensure the safety of the applicant;  
   ▪ provision of suitable bathroom or sleeping facilities, heating, and access to lighting and power;  
   ▪ provision of suitable kitchen facilities or adaptation of existing kitchen, and;  
   ▪ works to enable a disabled resident to care for dependent residents. | Applications considered from:  
a) disabled home owners;  
b) disabled tenants (both in the private and social housing sectors);  
c) disabled persons living at home with their family, and;  
d) parents or guardians of a disabled child; | Applications to include:  
a) completed application form, and;  
b) two estimates for the works in the required format  
Applications subject to:  
a) means test through standard test of resources, except where;  
b) the grant is approved in respect of a disabled child under the age of 19  
Works to be:  
a) completed within 12 months of grant approval;  
b) completed to the satisfaction of the Council |
<table>
<thead>
<tr>
<th>Scheme</th>
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<tbody>
<tr>
<td>Ribble Valley Adaptation Grant</td>
<td>Maximum individual</td>
<td>As per Mandatory DFG towards the one item</td>
<td>Ribble Valley adaptation DFG only applicable for 1 item and associated works to address the needs of the applicant; • provision of stair lift • conversion bathroom to</td>
<td>As per mandatory DFG Only 1 Ribble Valley adaptation grant within a 5 year period</td>
<td>All scheme conditions are the same as Mandatory DFG above except: • no means test</td>
</tr>
<tr>
<td></td>
<td>grant £7,000 + admin</td>
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<td>Scheme</td>
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</tr>
<tr>
<td>Disabled Facilities Discretionary Top up Grant</td>
<td>Maximum assistance per application: £25,000 from Better Care Fund allocation + admin fee</td>
<td>Assistance to: a) provide top-up funding to meet the reasonable cost of aids and adaptations to assist the applicant to live independently in their home, where a Disabled Facilities Grant is approved at the statutory maximum and the eligible expense less contribution also exceeds the</td>
<td>Aids and adaptations to be: (As set out above for Mandatory Disabled Facilities Grants)</td>
<td>Applications considered from: a) applicants for a Mandatory Disabled Facilities Grant, where the eligible costs of the work exceed the mandatory grant</td>
<td>Applications to include: a) No separate application - assistance linked to Mandatory DFG application</td>
</tr>
<tr>
<td>Scheme</td>
<td>Assistance Available</td>
<td>Purpose</td>
<td>Scope of Assistance</td>
<td>Eligibility</td>
<td>Scheme Conditions</td>
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<td>statutory maximum (currently £30,000).</td>
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<td></td>
<td>a) completed within 12 months of application approval</td>
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<td>b) completed to the satisfaction of the Council</td>
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<td>All the discretionary top up grant amount to be:</td>
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<td></td>
<td>a) registered as a local land charge against the property if the works include alterations to the property on owner occupied properties (ie, not equipment)</td>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td>b) 10% admin fee is charged where technical support is used. 5% admin fee where there is no technical input</td>
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<td></td>
<td>c) the full grant to be repaid if the property is sold, transferred, or assigned within 10 years.</td>
</tr>
</tbody>
</table>
Proposed amended
Discretionary
Disabled Facilities Grant Policy

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4. **Discretionary Top-up Grant**

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The availability of the top-up grant is at the discretion of the Council and subject to availability of funding.

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For some households the means testing requirement makes them not eligible for assistance. This often means the works are not carried out or don’t fully meet the person needs. The Ribble Valley adaptation allows a grant to provide 1 item and the associated works to address the needs of the applicant as recommended by the Occupational Therapist up to a maximum of £7,000. This will fund the cost of the 1 item prioritised by the Occupational Therapist. Where the RVA is providing the calculated contribution the applicant will still be eligible for further items to be provided as a DFG. The applicant can then choose as to whether they fund the remaining works themselves. The full grant will be registered as a land charge if the works include alterations to the property on owner occupied properties and, in the event the property is sold within a 10 year period, the Council require repayment. * Please see exception policy.

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<tbody>
<tr>
<td><strong>Mandatory Disabled Facilities Grant</strong></td>
<td>Maximum assistance per application:</td>
<td>Assistance to: Meet the Council’s statutory obligation to assist disabled residents to live independently in their homes</td>
<td>Aids and adaptations to: a) be recommended by an Occupational Therapist; b) meet the regulations governing eligibility for works, including: • adaptations to aid access into and around the property; • works to ensure the safety of the applicant; • provision of suitable bathroom or sleeping facilities, heating, and access to lighting and power; • provision of suitable kitchen facilities or adaptation of existing kitchen, and; • works to enable a disabled resident to care for dependent residents.</td>
<td>Applications considered from: a) disabled home owners; b) disabled tenants (both in the private and social housing sectors); c) disabled persons living at home with their family, and; d) parents or guardians of a disabled child;</td>
<td>Applications to include: a) completed application form, and; b) two estimates for the works in the required format</td>
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<tr>
<td>Statutory maximum: £30,000 from Better Care Fund allocation</td>
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<td>Applications subject to: a) means test through standard test of resources, except where; b) the grant is approved in respect of a disabled child under the age of 19</td>
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<td>Works to be: a) completed within 12 months of grant approval; b) completed to the satisfaction of the Council</td>
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<tr>
<td>Ribble Valley Adaptation Grant</td>
<td>Maximum individual grant £7,000 + admin fee</td>
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<td>As per mandatory DFG Only 1 Ribble Valley adaptation grant within a 5 year period</td>
<td>All scheme conditions are the same as Mandatory DFG above except: no means test, the full grant will be registered as a charge against the property for</td>
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<tr>
<td></td>
<td>To be funded from Better Care</td>
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<td>Grants in excess of £5,000 to be:</td>
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<td>a) registered as a local land charge against the property if the works include alterations to the property on owner occupied properties (ie, not equipment)</td>
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<td>b) 10% admin fee is charged where technical support is used. 5% admin fee for equipment only and no admin charge when there is no technical input</td>
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<td>c) a maximum of £10,000 be repaid if the property is sold, transferred, or assigned within 10 years.</td>
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<td>-----------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Disabled Facilities Discretionary Top up Grant | Maximum assistance per application: £25,000 from Better Care Fund allocation + admin fee | Assistance to: a) provide top-up funding to meet the reasonable cost of aids and adaptations to assist the applicant to live independently in their home, where a Disabled Facilities Grant is approved at the statutory maximum and the eligible expense less contribution also exceeds the statutory maximum (currently £30,000). | Aids and adaptations to be: (As set out above for Mandatory Disabled Facilities Grants) | Applications considered from: a) applicants for a Mandatory Disabled Facilities Grant, where the eligible costs of the work exceed the mandatory grant | Applications to include: a) No separate application - assistance linked to Mandatory DFG application

Applications subject to: a) means test through standard test of resources, except where b) the grant is approved in respect of a disabled child under the age of 19

Works to be: a) completed within 12 months of application approval b) completed to the
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<td>All the discretionary top up grant amount to be:</td>
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<td></td>
<td>a) registered as a local land charge against the property if the works include alterations to the property on owner occupied properties (ie, not equipment)</td>
</tr>
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<td></td>
<td>b) 10% admin fee is charged where technical support is used. 5% admin fee where there is no technical input</td>
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<td></td>
<td>c) the full grant to be repaid if the property is sold, transferred, or assigned within 10 years.</td>
</tr>
</tbody>
</table>

satisfaction of the Council
Financial impact of increased DFGs discretionary maximum grant levels

2019/20 – What would have been the likely impact on discretionary grants approved in-year if the proposed additional maximum grant levels were in place in 2019/20

<table>
<thead>
<tr>
<th>Year</th>
<th>Impact £</th>
<th>Impact on discretionary grants (including 10% admin fee)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019/20 actual</td>
<td>28,600</td>
<td>Discretionary Top Up grants - One grant would have been approved at £60,500 rather than £44,000 = £16,500</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Ribble Valley Adaptations grants - Two grants would have been approved at £7,700 rather than £5,500 and one grant that did not go ahead would have been approved at £7,700 = £12,100</td>
</tr>
</tbody>
</table>

2020/21 – Broad estimate of the impact on discretionary grants approved in 2020/21 if the proposed additional maximum grant levels are approved.

<table>
<thead>
<tr>
<th>Year</th>
<th>Impact £</th>
<th>Impact on discretionary grants (including 10% admin fee)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020/21 broad estimate</td>
<td>Up to 108,900</td>
<td>Discretionary Top Up grants awaiting approval – Four grants are awaiting approval that are likely to be above the current £44,000 maximum limit. One is confirmed to cost £60,500 and the other three may be somewhere between £44,000 and £60,500 = up to £66,000</td>
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<tr>
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<td>Ribble Valley Adaptations grants awaiting approval – Three grants are awaiting approval that are likely to be above the current £5,500 maximum and these are likely to cost £7,700 each = up to £6,600</td>
</tr>
<tr>
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<td></td>
<td>Total of the above is up to £72,600, as at the end of October 2020</td>
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<tr>
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<td></td>
<td>Broad estimate for the rest of 2020/21 – Based on simple extrapolation from the end of October 2020 (eight months) to the full year = (72,600 / 8 months) x 12 months = up to £108,900</td>
</tr>
</tbody>
</table>
Disabled Facilities Grants – Approval and monitoring processes

Confirmed November 2018 grant approval process:

- Ensure all grant approval commitments in-year are confined to the yearly Disabled Facilities Grants budget available.
- Monthly monitoring of the DFGs budget position supports this and confirms budget cover is available to support DFGs approvals granted.

Within the DFGs overall budget, separate budgets will be agreed for Mandatory DFGs, Discretionary Top-Up DFGs and Ribble Valley Adaptations Discretionary DFGs. This can be amended in-year by Committee. It is amended to ensure that Mandatory DFGs are not put in a waiting list position due to the level of discretionary DFGs approved.

Approvals for discretionary grants will be granted based on budget being available for discretionary grants (Discretionary Top-Up DFGs and Ribble Valley Adaptations Discretionary DFGs) and at any point the offer of discretionary grants can cease should the budget not support continuation.

A waiting list system would be employed when the yearly budget available for each type of DFG is fully committed, based on the value of grant approval commitments.

The priority order for DFGs is:
1. Mandatory DFGs (Urgent)
2. Mandatory DFGs (Non-urgent)
3. Discretionary Top Up Grants
4. Ribble Valley Adaptations Discretionary Grants.