

PD CEN/TS 16118:2012



BSI Standards Publication

Sheltered housing — Requirements for services for older people provided in a sheltered housing scheme

bsi.

...making excellence a habit.™

National foreword

This Published Document is the UK implementation of CEN/TS 16118:2012.

Attention is drawn to the fact that the UK committee voted against the approval of this European Technical Specification for the following reasons:

The committee believes that the provisions in the document are an inaccurate fit with sheltered housing in the UK. The requirements within the specification do not accurately reflect the sector in the UK and would not serve to improve quality within it.

There already exist several quality frameworks for sheltered housing providers in the UK, which are widely recognized, used and relevant:

- The Centre for Housing and Support (CHS) Code of Practice for Support Services
- Quality Assessment Framework (QAF) - although the use of the QAF is being reduced by some local authority review teams, it is non-the-less still a framework that is available in England.
- Association of Retirement Housing Managers (ARHM) Code of Practice for leasehold sheltered housing.
- Telecare Services Association (TSA) Code of Practice.

It is the view of the committee that the proposed document is not as robust as the existing frameworks, and to have a technical specification which is of less relevance would not contribute to the sector.

The way support and care is being delivered and funded in the UK is currently undergoing significant change and the committee does not think the document gives sufficient flexibility for providers to respond to this changing environment.

The UK participation in its preparation was entrusted by Technical Committee SVS/8, Community Services, to Subcommittee SVS/8/1, Sheltered housing services.

A list of organizations represented on this committee can be obtained on request to its secretary.

This publication does not purport to include all the necessary provisions of a contract. Users are responsible for its correct application.

© The British Standards Institution 2012

Published by BSI Standards Limited 2012

ISBN 978 0 580 67741 0

ICS 03.080.99

Compliance with a British Standard cannot confer immunity from legal obligations.

This Published Document was published under the authority of the Standards Policy and Strategy Committee on 31 May 2012.

Amendments issued since publication

Amd. No.	Date	Text affected
----------	------	---------------

ICS 03.080.99

English Version

**Sheltered housing - Requirements for services for older people
provided in a sheltered housing scheme**

Foyers logements - Exigences relatives aux prestations de
service fournies aux personnes âgées dans le cadre d'un
ensemble foyer-logement

Betreutes Wohnen - Anforderungen an Dienstleistungen für
ältere Menschen im Rahmen der Wohnform Betreutes
Wohnen

This Technical Specification (CEN/TS) was approved by CEN on 30 January 2012 for provisional application.

The period of validity of this CEN/TS is limited initially to three years. After two years the members of CEN will be requested to submit their comments, particularly on the question whether the CEN/TS can be converted into a European Standard.

CEN members are required to announce the existence of this CEN/TS in the same way as for an EN and to make the CEN/TS available promptly at national level in an appropriate form. It is permissible to keep conflicting national standards in force (in parallel to the CEN/TS) until the final decision about the possible conversion of the CEN/TS into an EN is reached.

CEN members are the national standards bodies of Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey and United Kingdom.



EUROPEAN COMMITTEE FOR STANDARDIZATION
COMITÉ EUROPÉEN DE NORMALISATION
EUROPÄISCHES KOMITEE FÜR NORMUNG

Management Centre: Avenue Marnix 17, B-1000 Brussels

Contents

Page

Foreword.....	4
Introduction	5
1 Scope	5
2 Terms and definitions	5
3 Transparency of the services offered.....	6
3.1 General.....	6
3.2 Written information on the offer.....	6
3.2.1 General.....	6
3.2.2 Scheme	7
3.2.3 Dwelling	7
3.2.4 Basic services	8
3.2.5 Optional services	8
3.2.6 Cost and financing.....	8
3.2.7 Additional written information.....	8
3.3 Oral information on the offer	9
3.3.1 General.....	9
3.3.2 Information on the services	9
3.3.3 Information on the scheme	10
3.3.4 Information on cost and finance	10
4 Services	10
4.1 Basic services	10
4.1.1 General.....	10
4.1.2 Assistance	10
4.1.3 Safety and security	12
4.2 Optional services	12
5 Requirements for service coordinators and staffing	13
5.1 General.....	13
5.2 Skills and abilities.....	13
5.3 Relevant knowledge	13
5.3.1 Professional knowledge.....	13
5.3.2 Knowledge of the services offered and the scheme.....	13
5.4 Staffing level.....	14
6 Housing.....	14
6.1 Location and neighbourhood	14
6.2 Dwellings	14
6.3 Common facilities	15
6.4 Facility services	15
7 Requirements for the main provider.....	15
8 Contractual requirements	16
8.1 General.....	16
8.2 Types of contracts	16
8.3 Requirements for contracts	16
8.3.1 Requirements for contracts related to the residents	16
8.3.2 Requirements for the cooperation contract.....	17
9 Quality.....	17
9.1 General.....	17
9.2 Resident feedback	18

9.3	Active involvement of residents	18
9.3.1	General	18
9.3.2	Active involvement through a committee	18
9.4	Resident survey	18
9.4.1	General	18
9.4.2	Participants	19
9.4.3	Content	19
9.4.4	Formulation and structure	19
9.4.5	Documentation of survey results	19
9.4.6	Reporting	19
9.5	Internal quality audit	20
Annex A	(normative) Catalogue of optional services	21
Annex B	(informative) Recommendations for contents of questionnaire	22
Bibliography	24

Foreword

This document (CEN/TS 16118:2012) has been prepared by Technical Committee CEN/TC 385 “Project Committee - Services for sheltered housing for the elderly”, the secretariat of which is held by ASI.

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. CEN [and/or CENELEC] shall not be held responsible for identifying any or all such patent rights.

According to the CEN/CENELEC Internal Regulations, the national standards organizations of the following countries are bound to announce this Technical Specification: Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey and the United Kingdom.

Introduction

Increasing focus has been placed on services to help people sustain and improve their capacity to live independently in their accommodation and a range of sheltered housing services has been developed by a myriad of providers across Europe.

With so much choice available, it is important to demonstrate that such services deliver consistency, customer satisfaction, and value for money.

The work of CEN/TC 385 is to standardize the requirements for delivering sheltered housing services, working with partners across Europe and taking account of national standards and recognised codes of practice.

This CEN Technical Specification (CEN/TS) intends to provide a guideline for quality assurance in the sheltered housing market. Its application is voluntary. It defines minimum quality standards regarding the services which should be made available by providers. These quality standards serve as guidance for the providers if they wish to offer sheltered housing. At the same time the CEN/TS intends to make the services offered for this type of housing more transparent for the consumers.

1 Scope

This CEN/TS applies to all providers of sheltered housing irrespective of the legal form of ownership and whether the service is publicly or privately funded. Its primary purpose is to improve and maintain standards of sheltered housing services and not that of the building design or specification.

This CEN/TS primarily applies to new build sheltered housing schemes, but providers may choose to apply this to existing schemes where circumstances permit.

This CEN/TS refers to facilities of sheltered housing for older people living in a sheltered housing scheme only and is not applicable to services required for nursing homes.

2 Terms and definitions

For the purposes of this document, the following terms and definitions apply.

2.1

sheltered housing

services for older people living in an accessible dwelling in a sheltered housing scheme, comprising basic services and optional services allowing them to live independently and to feel secure

Note 1 to entry The services are provided to support an independent and self-determined manner of living and managing a household as well as the integration of the individual into the residential community and the neighbourhood. The sheltered housing services are not based on those of a nursing home.

2.2

basic services

minimum package of services provided for sheltered housing residents in all cases

2.3

optional services

any other services that exceed the basic services and from which residents are free to benefit on a voluntary and individual basis

2.4
sheltered housing scheme

buildings and external spaces which make up a particular sheltered housing development including the dwellings, common rooms, circulation spaces and garages (where provided)

Note 1 to entry "scheme" is used for "sheltered housing scheme".

2.5
main provider

legal body (e.g., a municipality, private company, charity or community of owners) which is responsible for ensuring that the provisions of the sheltered housing are fulfilled

2.6
service provider

organization that enters into a contract with the resident and/or the main provider for the provision of basic and/or optional services

2.7
service coordinator

person in charge of coordinating the services provided within the sheltered housing on behalf of both the main provider and the residents

3 Transparency of the services offered

3.1 General

The main provider shall fulfil the following requirements. Where properties are being resold by a current owner, responsibility for provision for ensuring the purchaser has accurate information will be shared between the vendor, the purchaser, their legal advisers and the main provider.

3.2 Written information on the offer

3.2.1 General

The handover of information shall be documented.

The information provided shall be transparent for the consumer and formatted in such a manner as to facilitate comprehension.

The information shall give the date when it was issued to the consumer. The information documents shall indicate when they were last updated and be up to date.

The information shall be given to the prospective resident before conclusion of the contract either at or if possible, before the first consulting session.

The required information (see 3.2.2 to 3.2.7) shall be given in writing to the prospective resident in the following form:

- a) information sheet on the scheme design (see 3.2.2) and dwellings (see 3.2.3);
- b) catalogue of services and prices of the basic services;
- c) catalogue of services and prices of the optional services;
- d) scheme rules;

- e) contracts (contract of rental/sale, contract for services).

3.2.2 Scheme

The information on the scheme shall at least contain statements on:

- a) main provider's address and contact data;
- b) contact person (function, phone numbers, and e-mail address);
- c) year of construction;
- d) size of the scheme (number of dwellings);
- e) services provided in the scheme;
- f) layout of the scheme;
- g) type and amount of common facilities (e.g., therapeutic bath, reading room, café, sauna, sports facilities, function rooms);
- h) accessibility of the building;
- i) accessibility of the area and of the building entrances, open spaces and connecting paths;
- j) security measures;
- k) map of the area showing local infrastructure;
- l) guest rooms in the scheme;
- m) environmental performance;
- n) facilities and parking spaces for mobility scooters, power wheelchairs and wheelchairs;
- o) parking spaces for cars: disabled, visitor and resident.

3.2.3 Dwelling

The information on the dwelling shall at least contain statements on:

- a) size of the dwellings referring to national standards;
- b) location of the dwelling in the scheme;
- c) layout of the individual dwelling;
- d) equipment of the dwelling;
- e) type and location of any storage rooms;
- f) possibility for the installation of additional equipment (e.g., washing machine, electronic devices);
- g) admissibility of pets;
- h) special terms and conditions regarding use of dwellings;
- i) environmental performance.

3.2.4 Basic services

The information on the basic services shall contain statements on:

- a) name and full contact details of main provider together with an identified contact person;
- b) names and full contact details of other service provider(s) (if applicable) together with the identified contact person(s);
- c) catalogue of basic services;
- d) essential information on sub-contractors providing basic services.

It shall be clarified that basic services do not include care services.

3.2.5 Optional services

The information on the optional services shall at least contain statements on:

- a) free choice of optional service provider;
- b) catalogue of optional services;
- c) co-operation with external optional service providers.

3.2.6 Cost and financing

The information on costs and financing shall at least contain statements on:

- a) range of minimum to maximum rent or sale/offer prices per dwelling;
- b) known or calculated operating costs (monthly average) per dwelling;
- c) maintenance charges (monthly average);
- d) any other charges;
- e) possibility of acquisition of property;
- f) detailed cost for basic service per month;
- g) any non-recurring costs at the commencement or conclusion of the contract;
- h) cost per car parking space;
- i) details of deposit system and mandatory insurance if any.

A pricelist for optional services shall also be provided.

3.2.7 Additional written information

The additional written information shall at least contain statements on:

- a) occupancy restrictions;
- b) possibility of and conditions for a trial stay;

- c) handling of complaints and who to contact in case of complaints;
- d) contractual arrangements;
- e) pre-contractual information session;
- f) governance arrangements (e.g., residents' committee);
- g) advocacy and personal advisor.

3.3 Oral information on the offer

3.3.1 General

To ensure the transparency of the offer and for the orientation of prospective residents, an oral consultation on the services provided by the service provider shall be given in addition to the written information, except in those cases where the prospective resident explicitly abstains from this. Special consulting agencies and/or consumer advocates shall be pointed out to ensure that the prospective resident can get information from an independent body.

The intention of the consultation shall be to ensure that the offers of the main provider and service provider and the expectations of the prospective resident are aligned.

The main provider shall ensure that the pre-contractual consultation is carried out by an appropriately informed and competent person. Consultation on the services and the housing offer can take place in a shared session. Where separate consultations are provided by the main provider and the service provider, it shall be ensured that all aspects of 3.2 are dealt with.

The consultation on the service concept shall take place at least one day before the signing of any contract.

During the pre-contractual consultation, a guided tour of the scheme and the dwelling shall be offered.

The pre-contractual consultation shall be free of charge and non-binding.

Information on all aspects of 3.2.2 to 3.2.4 shall be given with the help of the written information.

3.3.2 Information on the services

Information on the following aspects of the services shall be given:

- a) clarification of the written information material (if needed);
- b) explanation of the contractual arrangements.

The main provider shall make every effort to ensure that prospective residents have information on which to base an informed decision about moving into the scheme, to ensure that the prospective resident's needs and expectations can be met in the sheltered housing, taking into account particularly:

- a) the prospective residents' reasons for moving in;
- b) their ability to sustain independent living, with available support;
- c) their need for provided support.

It shall be made clear to the prospective resident that sheltered housing does not provide the same level of assistance as a nursing home (and that further arrangements will be required in the event of loss of independence).

3.3.3 Information on the scheme

The content of the oral information on the scheme shall include:

- a) detailed descriptions of the common facilities within the scheme;
- b) detailed descriptions of the available dwellings.

3.3.4 Information on cost and finance

The oral information shall contain a comprehensive listing of the real accumulated cost. There shall be a reference to financial support possibilities (e.g., care insurance) and to relevant agencies.

The information shall cover all clauses of 3.2.6 supported by the written information material.

4 Services

4.1 Basic services

4.1.1 General

The main provider shall be responsible for the provision of basic services. However, the main provider may involve sub-contractors.

Basic services shall be provided according to necessity.

The assistance for residents shall take priority over the consulting for prospective residents.

4.1.2 Assistance

4.1.2.1 General

Assistance shall include the provision of advice, information, and organizational activities.

Assistance shall be rendered to the residents, their legal representatives and persons close to the residents as agreed with the residents.

The service provider shall promote and facilitate independent living and stimulate the potential and self-help of the residents.

4.1.2.2 Provision of general advice

The service coordinator shall be available, preferably on site, at announced weekly hours for the provision of general advice:

- a) concerning the various relevant authorities;
- b) in crisis situations (e.g., death of close friends or relatives, serious illness, resident in need of long-term care);
- c) on support services enabling the individual to live independently.

4.1.2.3 Regular information service

The regular information service shall cover (depending on necessity and based on facilities located close to the scheme):

- a) the services offered as part of the basic and optional services;
- b) cultural and educational activities and events;
- c) public transport;
- d) operation of the emergency call devices offered;
- e) operation and use of existing (technical) installations;
- f) advisory centres providing advice with regard to housing and other areas;
- g) the possibility of obtaining legal and social counselling;
- h) shopping facilities, service centres, and mobility services;
- i) changes in personnel, e.g. who to contact about services.

4.1.2.4 Organizational activities

Organizational activities shall include assistance with contacting mobility services and domestic services if the resident so wishes.

4.1.2.5 Social and cultural activities

In order to promote a sense of community, contact and assistance among the residents themselves as well as contact with relevant groups, associations, or institutions within the neighbourhood or the community should be encouraged.

This can include:

- a) cultural, social, and health activities;
- b) neighbourly help between residents;
- c) neighbourhood involvement;
- d) excursions.

4.1.3 Safety and security

4.1.3.1 Alarm

There shall be a suitable alarm call system.

Unless regulated elsewhere by law, the service (or main) provider shall make arrangements in case of alarm (e.g. fire alarm) regarding

- alarm procedures and their documentation;
- access to the building.

The necessary procedures in case of alarms shall be made known to the resident in writing. User-friendly alarm-operating instructions shall be available.

4.1.3.2 Emergency

There shall be a suitable emergency call system.

Unless regulated otherwise by law, the service provider shall make arrangements in case of emergency (e.g. heart attack) regarding

- immediate help;
- operation of the emergency call devices;
- storage and use of keys;
- confidentiality of personal data.

Depending on the kind of emergency, help shall be provided in an appropriate and timely manner. Procedures shall be documented.

The service provider shall provide performance information so consumers can see if it is achieving targets¹.

The emergency call system shall be connected to an emergency call office which is staffed 24 hours.

Adequate emergency measures shall be immediately set in motion if the emergency call is triggered. The call shall be answered by staff qualified for this task. The nature and timing of each response shall be monitored and documented.

The main provider and service provider should coordinate to establish master key arrangements and/or key storage as necessary.

4.2 Optional services

The main provider shall provide a list of providers for the optional services listed in Annex A.

NOTE The optional service providers can be volunteers.

There shall be a free choice of optional services and service providers.

Services will usually involve charges that shall be met separately by residents outside their contract with the main and/or services provider.

5 Requirements for service coordinators and staffing

5.1 General

The tasks of a service coordinator require the qualification profile specified in 5.2 to 5.4.

This service coordinator shall meet the requirements as follows:

- The service coordinator shall work on behalf of the main provider.
- The service coordinator shall be either employed, self-employed or a company.

NOTE These requirements reflect the complexity of funding and commissioning relationships between residents, landlords, service providers and funders, which will impact on and vary the type and level of staffing available.

5.2 Skills and abilities

The service coordinator shall possess the following skills and abilities:

- a) communication skills;
- b) interpretive competencies (in particular in order to recognise, understand, and evaluate social situations and react in an adequate manner);
- c) reflective skills (in order to adjust his/her behaviour towards the residents with a view to respecting and promoting their right of self determination and at the same time maintain a balance between adequate help and inadequate patronising and dominating behaviour);
- d) planning, organizational, and arrangement competencies (in order to adjust to the different needs of the residents and to make available the locally existing resources;
- e) ability to initiate civic involvement;
- f) ability to encourage social interaction;
- g) ability to encourage residents to help each other, when appropriate.

5.3 Relevant knowledge

5.3.1 Professional knowledge

The service coordinator shall have knowledge in the following areas:

- a) basic knowledge of relevant legislation;
- b) basic knowledge of health, psychological and social care needs of older people;
- c) knowledge of support options and skills in determining support requirements;
- d) knowledge of first aid measures.

5.3.2 Knowledge of the services offered and the scheme

The service coordinator shall have knowledge of the following:

- a) the scheme;

- b) the social, cultural, and service organizations in the neighbourhood;
- c) the facilities within the scheme;
- d) the housing and known or calculated relevant costs;
- e) the basic services;
- f) the optional services.

5.4 Staffing level

With regard to the staffing level, the following shall apply:

- at least 1 full-time equivalent job per 100 dwelling units;
- minimum present time on site of 20 minutes per week per dwelling;
- it shall be ensured that stand-ins are available in case of absence (e.g., sickness, holidays).

NOTE 1 The staffing level can be varied by agreement with the residents.

NOTE 2 Some small schemes will not have an on site presence.

6 Housing

6.1 Location and neighbourhood

The concept should be community oriented.

The location of the scheme should offer the prerequisites both for an independent manner of living and for integration into the community.

The main provider shall signpost residents to transport services that may be available to essential shopping and healthcare facilities. If these do not exist within walking distance and if suitable public transport is not available, the provider shall work with residents and local organizations including transport providers to explore options for suitable services to be provided.

The building entrances, open spaces, and connecting routes forming part of the scheme as well as access to the parking spaces and waste containers shall be accessible in accordance with applicable standards.

6.2 Dwellings

The dwellings shall have specific areas for cooking, living and sleeping and a separate bathroom or shower room.

The dwellings shall ensure the privacy of the resident and shall consist of closed units having door locks, bells, and letter boxes for each dwelling.

The dwellings shall be accessible according to relevant standards or guidelines as current or qualifying at the time of build completion or certification of works under regulations that govern completion.

There shall be the possibility for the installation of a washing machine either in the dwelling or in a common laundry room.

6.3 Common facilities

The provider shall set out clearly – by a system of estate classification and/ or descriptions of each estate - information for prospective and current residents about which facilities are available at each location.

The architectural design should be clearly laid out and should promote communication between residents.

Inside the scheme or in the immediate surroundings, there shall be common facilities that can be used flexibly including holding advisory sessions and giving assistance with the opportunity for private meetings. The common facility should be a separate room.

NOTE 1 Some small schemes can have more limited common facilities.

There shall be the possibility for the installation of a washing machine either in the dwelling or in a common laundry room.

There should be a guest room or apartment. Where guest accommodation is available there should be clear guidelines for use and booking.

Residents shall be able to park and charge their scoot mobiles at walking distance from the entrance of the residences.

NOTE 2 These facilities are examples of what sheltered housing schemes can include but, depending upon the age, location and size of the scheme, not all of these facilities can be provided.

6.4 Facility services

The main provider shall provide facility services that comprise

- a) the cleaning and maintenance of common parts (e.g., stairway, common rooms, courtyard sweeping);
- b) snow clearing and spreading services as reasonable and safe;
- c) central waste disposal including recycling where possible;
- d) cleaning and maintenance of the grounds;
- e) gardening of the common gardens.

NOTE Facility services are mandatory services.

7 Requirements for the main provider

The main provider shall be in charge of the general and financial management of the scheme.

The main provider shall be responsible for providing

- confidentiality;
- liability insurance.

The main provider shall maintain

- insurance to the common parts of the scheme and to cover general liabilities;
- responsibility for invoicing.

8 Contractual requirements

8.1 General

In addition to the following requirements, all occupancy agreements shall comply with national legislation and regulation in respect of tenancy and leaseholders' rights and obligations.

8.2 Types of contracts

Regulations should be set out in one of the following contracts:

- Regulations with regard to the property shall be covered by the property contract.
NOTE "Property contract" includes tenancy, long lease and rental contracts and contract of sale.
- Regulations with regard to the basic services and the optional services shall be covered in the service contract.
- Regulations with regard to the cooperation between the main provider and the service provider and/or the property owner - if different - shall be covered in a cooperation contract.

Property contract and service contract shall be interrelated, since sheltered housing is a combination between the property related element and the service related element.

8.3 Requirements for contracts

8.3.1 Requirements for contracts related to the residents

8.3.1.1 General

The resident-related contracts shall meet the following formal and substantive requirements.

NOTE The contracts follow legal requirements of each country.

8.3.1.2 Formal requirements

- The contracts should be easy to read and understand, and shall have a clear structure and layout.
- The contracts shall be drawn up in a clearly legible font and should be made available in alternative formats if necessary.

8.3.1.3 General substantive requirements

- a) Transparency
The contracts shall clearly state which party is responsible for which element or service within the scheme. Any limitations or exceptions shall be pointed out clearly to the prospective resident.
- b) Specification and classification of services
All contractual services shall be specified in detail and clearly classified as falling under property, basic services, or optional services.
- c) Remuneration
In the areas of property, basic services and optional services the remuneration shall be clearly associated to the particular contractual element or service within the scheme.

8.3.1.4 Special requirements for the service contract

The service contract shall meet the following requirements:

- a) The service contract shall regulate the obligations of the service provider.
- b) Any potential and the conditions for increase in the remuneration of basic services shall be clearly stated in the service contract.
- c) The service provider for the basic services shall be clearly identified.
- d) It shall be clearly stated in the contract that there is no obligation to engage a specific service provider to render optional services. Without prejudice to the service contract for the basic services, residents shall be free in any case to engage any third party to render the optional services.
- e) The regulations concerning the emergency call service shall be integrated in the service contract. They shall clearly point out the regulations concerning the service provider as well as the resident especially with regard to the technical needs for the system and the processes in case of an alarm.
- f) The location of the emergency call office shall be indicated in the service contract.

8.3.1.5 Special requirements for the property contract

The property contract shall meet the following requirements:

- a) The property shall be described in detail with regard to its size, location and equipment as well as its accessibility (see clause 6).
- b) Any right of termination, especially any right of re-possession shall be regulated in the property contract.

8.3.2 Requirements for the cooperation contract

- a) The cooperation contract shall define the obligations concerning quality management of all parties.
- b) In case of termination of the cooperation contract the main provider shall ensure that the service contracts are transferred to another service provider under equal or better conditions for the residents.
- c) The main provider shall ensure succession if he wants to terminate the contract under equal or better conditions for the residents.

9 Quality

9.1 General

The quality work shall be based on the requirements of the CEN/TS. The work with quality and quality assurance shall involve the main provider, the service provider and the residents.

The quality assurance work shall consist of:

- a) resident feedback;
- b) active involvement of residents;
- c) resident surveys;
- d) internal quality audit.

The quality work should take place frequently and continuously.

If the main provider and service providers are different parties, the quality work between these shall be coordinated.

9.2 Resident feedback

There shall be written procedures for the handling of feedback (such as complaints, suggestions, ideas) showing who is responsible for receiving and investigating them.

Feedback shall be documented together with any relevant analysis and resulting action.

The individual who has put forward feedback shall receive an oral or written response with a proposed resolution within 4 weeks maximum.

NOTE ISO 10002 Customer satisfaction - Guidelines for complaints handling in organizations provides clear guidance to establish an effective and efficient complaints handling process that will satisfy all stakeholders.

9.3 Active involvement of residents

9.3.1 General

The residents shall have the opportunity for active involvement either individually or through a committee. The arrangements shall ensure that residents have an opportunity to put forward opinions within a formal governance process.

9.3.2 Active involvement through a committee

If a committee exists, it shall consist of elected representatives of the residents, the service provider and the main provider. There shall be one annual meeting at the minimum. If a committee of elected representatives of residents exists it may co-opt representatives from the service provider and main provider, as required.

The consultation shall focus on the residents' feedback.

The following aspects from the requirements shall be covered in any meeting:

- services;
- dwellings.

The committee meetings shall be advertised and documented.

The documentation shall be made available so that all residents and other interested parties can study it, respecting individual confidentiality.

9.4 Resident survey

9.4.1 General

Resident surveys shall be carried out once every two years or as otherwise agreed with the residents.

Providers shall set out clearly their strategy for engaging residents over the quality of service provided and for measuring residents' satisfaction, and the stages at which this will be undertaken.

Providers may use a range of approaches including surveys of both new and existing residents, consultation events, and agreements with residents at particular estates.

Results shall be made available to managers and residents. Management shall report back on how it intends to respond.

9.4.2 Participants

All residents shall be given the opportunity of participating in the survey. The residents shall be guaranteed anonymity in connection with the survey.

9.4.3 Content

The following aspects from the requirements shall be included in the survey:

- services;
- dwellings.

9.4.4 Formulation and structure

Where a written survey is carried out the following requirements shall be fulfilled:

- a) Surveys shall be based on how the residents perceive that the standards are fulfilled and how pleased the residents are.
- b) The questionnaire shall be presented in an accessible manner, for example, using an appropriate font type and size.
- c) Participants shall be able to classify their answers by degrees of satisfaction/dissatisfaction. There should be opportunities for the respondent to add free text responses.
- d) The survey/questionnaire/information shall be made available in alternative formats as necessary.
- e) Structure and instructions shall be clear - service providers should have a mechanism in place for the resident to complete the questionnaire with confidence.

9.4.5 Documentation of survey results

The documentation shall contain the following:

- a) the results of the survey;
- b) the name of the business;
- c) the response rate;
- d) survey period;
- e) method (telephone conversation or face-to-face interviews or questionnaire);
- f) questionnaire as defined in Annex B;
- g) report on free text responses where applicable;
- h) planned action resulting from the survey.

9.4.6 Reporting

The result shall be made publicly available by the main provider.

9.5 Internal quality audit

Procedures for internal quality audit shall exist and should specify what should be accomplished and who should be entitled to the result.

Annex A (normative)

Catalogue of optional services

The main provider shall provide a list of providers for the following optional services which are available.

The list shall include but not be restricted to information about accessing services from suitably qualified individuals and, where relevant, individuals and organizations who hold appropriate registrations with the relevant care regulator (and possibly other) as follows:

- a) delivery of meals to the dwelling;
- b) basic and maintenance cleaning of the individual dwellings;
- c) internal window cleaning;
- d) basic and technical nursing;
- e) pick up and delivery services;
- f) transport and accompanying service;
- g) services in case of illness and hospitalisation (e.g in case of hospitalisation, delivery of clothes and underwear to the hospital);
- h) laundry or cleaning of clothes and underwear;
- i) hanging and taking down curtains and washing them;
- j) removal and replacement of bed linens;
- k) nursing-related assistance/(in UK context: personal care?);
- l) carrying out small repair work on objects belonging to the resident;
- m) hanging and taking down objects;
- n) shopping service;
- o) disposal of perishable food;
- p) emptying the letterbox;
- q) ensuring that pets are taken care of;
- r) watering flowers/plants;
- s) help with guest accommodation;
- t) preparation of meals.

NOTE Services usually involve charges that are to be met separately by residents outside their contract with the main and/or services provider.

Annex B (informative)

Recommendations for contents of questionnaire

B.1 The following aspects should be included in the first survey conducted after the resident has moved in:

- a) satisfaction with the oral information given prior to moving in;
- b) satisfaction with the advice given during the transition period (when moving in);
- c) questions concerning the type of housing, for example:
 - location and environment;
 - equipment of the dwelling;
 - common facilities;
 - clear layout of the scheme promoting communication.

B.2 The following aspects (questions concerning the basic services and the evaluation of the scheme) should be included in any resident survey:

- a) questions concerning the facility services, for example:
 - introduction of measures for ensuring the operation of building service installations in case of malfunctions;
 - cleaning of common areas (stairways, common rooms, courtyards) as well as snow clearing and spreading service, central waste disposal.
- b) questions concerning the use and evaluation of the assistance, for example:
 - provision of advice;
 - informational activities;
 - arrangement and organizational activities;
 - social and cultural activities.
- c) question concerning the service coordinator, for example:
 - satisfaction with performance of the service coordinator;
 - stimulation and promotion of the residents' self-help potential by the encouragement and support of neighbourly help inside and outside the sheltered housing scheme.
- d) questions concerning the alarm (see 4.1.3.1), for example:
 - evaluation of the annual instructions on how to operate the alarm procedures;
 - quick help if the system is activated.

- e) questions concerning the emergency call (see 4.1.3.2), for example
 - usability;
 - annual instruction;
- f) quick help if the system is activated. questions concerning the use and evaluation of the optional services (see Annex A)
- g) questions concerning the contracts, for example
 - readability and understandability of the contracts;
 - transparent presentation of services and prices.
- h) questions concerning the measures for quality assurance, for example
 - resident surveys;
 - feedback management;
 - handling of suggestions and criticism expressed by the residents.

In addition, the questionnaires should provide space for the residents to bring forward their own suggestions or to freely express criticism.

Bibliography

ISO 10002, *Quality Management - Customer satisfaction - Guidelines for complaints handling in organizations*

British Standards Institution (BSI)

BSI is the national body responsible for preparing British Standards and other standards-related publications, information and services.

BSI is incorporated by Royal Charter. British Standards and other standardization products are published by BSI Standards Limited.

About us

We bring together business, industry, government, consumers, innovators and others to shape their combined experience and expertise into standards-based solutions.

The knowledge embodied in our standards has been carefully assembled in a dependable format and refined through our open consultation process. Organizations of all sizes and across all sectors choose standards to help them achieve their goals.

Information on standards

We can provide you with the knowledge that your organization needs to succeed. Find out more about British Standards by visiting our website at bsigroup.com/standards or contacting our Customer Services team or Knowledge Centre.

Buying standards

You can buy and download PDF versions of BSI publications, including British and adopted European and international standards, through our website at bsigroup.com/shop, where hard copies can also be purchased.

If you need international and foreign standards from other Standards Development Organizations, hard copies can be ordered from our Customer Services team.

Subscriptions

Our range of subscription services are designed to make using standards easier for you. For further information on our subscription products go to bsigroup.com/subscriptions.

With **British Standards Online (BSOL)** you'll have instant access to over 55,000 British and adopted European and international standards from your desktop. It's available 24/7 and is refreshed daily so you'll always be up to date.

You can keep in touch with standards developments and receive substantial discounts on the purchase price of standards, both in single copy and subscription format, by becoming a **BSI Subscribing Member**.

PLUS is an updating service exclusive to BSI Subscribing Members. You will automatically receive the latest hard copy of your standards when they're revised or replaced.

To find out more about becoming a BSI Subscribing Member and the benefits of membership, please visit bsigroup.com/shop.

With a **Multi-User Network Licence (MUNL)** you are able to host standards publications on your intranet. Licences can cover as few or as many users as you wish. With updates supplied as soon as they're available, you can be sure your documentation is current. For further information, email bsmusales@bsigroup.com.

BSI Group Headquarters

389 Chiswick High Road London W4 4AL UK

Revisions

Our British Standards and other publications are updated by amendment or revision.

We continually improve the quality of our products and services to benefit your business. If you find an inaccuracy or ambiguity within a British Standard or other BSI publication please inform the Knowledge Centre.

Copyright

All the data, software and documentation set out in all British Standards and other BSI publications are the property of and copyrighted by BSI, or some person or entity that owns copyright in the information used (such as the international standardization bodies) and has formally licensed such information to BSI for commercial publication and use. Except as permitted under the Copyright, Designs and Patents Act 1988 no extract may be reproduced, stored in a retrieval system or transmitted in any form or by any means – electronic, photocopying, recording or otherwise – without prior written permission from BSI. Details and advice can be obtained from the Copyright & Licensing Department.

Useful Contacts:

Customer Services

Tel: +44 845 086 9001

Email (orders): orders@bsigroup.com

Email (enquiries): cservices@bsigroup.com

Subscriptions

Tel: +44 845 086 9001

Email: subscriptions@bsigroup.com

Knowledge Centre

Tel: +44 20 8996 7004

Email: knowledgecentre@bsigroup.com

Copyright & Licensing

Tel: +44 20 8996 7070

Email: copyright@bsigroup.com



...making excellence a habit.™