

ARHM GOOD PRACTICE NOTE

THE ROLE OF SCHEME MANAGER AND ASSOCIATED ISSUES

The scheme manager of a private retirement housing scheme is the person that provides support to residents, assists in the management of the scheme, and responds to emergency alarm calls within duty hours.

This person may also be known as the House Manager, Estate Manager, Court Manager or another title.

The role may be residential or non-residential.

ARHM Code of Practice

- Managers should issue scheme managers with a job description that clearly defines their duties and responsibilities and ensure that there is a clear focus for service delivery.
- Managers should also make clear what scheme managers can and cannot do for residents to protect them from unreasonable demands.
- Managers should inform residents of the scheme manager's terms of employment, duties and responsibilities and should provide them with a copy of the scheme manager's job description and hours of duty upon request.
- Managers should inform residents of any intention to change the job description and hours of duty of scheme managers. If this constitutes a significant change then the guidance set out in Chapter 7 Variation to Custom and Practice should be followed.

This good practice note advises managers about how to set out the duties and responsibilities of scheme managers, and what they can and cannot do for residents.

There is not a definitive list of duties that is appropriate for all schemes, each organisation may have a different approach, but the guidance below will assist managers to comply with the code.

Core Duties

The following represents examples of core duties of scheme managers.

- Resident Contact
 - To check on the welfare of each resident whilst on duty.
 - Residents should be offered options of whether to have daily, weekly or other contact periods.
 - A daily call using the alarm system is one method used by managers but is not the only method that is appropriate.

- During the periods when the scheme manager is off duty or on leave, some managers may use call centres to contact 'at risk' residents.
 - During extended leave of absence of the scheme manager, managers should consider whether a relief manager should be used.
 - If residents do not want any calls or face to face contact at all on a regular basis, the manager should have a procedure to deal with this request which includes a form of written waiver or disclaimer.
- Respond to Emergencies
 - To respond to emergency calls during duty hours and contact relevant services or other sources if assistance required.
 - Temporary Support
 - To give temporary help and general assistance of a neighbourly kind in the case of accidents or illness or distress, until help from the local emergency services and/or assistance from relatives or neighbours can be obtained.
 - Record Keeping
 - To keep a confidential current register of the doctors and nearest relatives of each of the residents and an emergency telephone number of health, social services and emergency services. To liaise with the call centre about information on residents
 - Advice about Support Services
 - To advise and assist residents in respect of contact with local authority and statutory services.
 - Diary/Day Book/Log
 - To maintain a record of relevant events at the scheme including relevant incidents, for example contractors' visits, accidents and social events.
 - Security
 - To monitor the security of the scheme by checking doors and windows are kept locked in communal areas at the end of duty hours.
 - Scheme Services
 - To supervise and monitor the performance of contractors such as gardeners, cleaners and window cleaners.
 - Building Maintenance
 - To inspect and report all repairs which are the landlord's responsibility.
 - To liaise with contractors over access to carry out repairs.
 - To obtain feedback from residents on their satisfaction with the standard of work of contractors and report upon.
 - Health and Safety
 - To monitor the health and safety of residents and visitors to the scheme.
 - To report any assessed new risks as soon as possible.
 - To keep records of risk assessments for health and safety, asbestos and fire.
 - To record and monitor substances hazardous to health used on the scheme.
 - To keep the emergency plan for the scheme and make it available to local emergency services.

- Testing the Emergency Alarm System
 - To carry out a check of the system at least every 6months.
- Communications with Residents
 - Produce newsletters, notices and information sheets.

Non-Core Duties

Additional duties may include

- Guest Rooms
 - Organising the letting and cleaning of the guest room.
- Laundry
 - Ensuring that all laundry equipment is kept clean, safe and in working order.
- Communal Lounge
 - To work with residents to encourage regular social activities are organised in the communal lounge.
- Residents Associations
 - To liaise with any recognised residents' association at the scheme.
- Support Plans
 - To liaise with residents and agree and update support plans.
- Liaison with Social Services and others
 - To actively promote liaison with social services, occupational therapists, primary care trusts and GPs so that scheme managers become involved in case conferences and assessments.

Exclusions

Scheme Managers are not expected to carry out any of the following roles:-

- Providing personal care for residents including assistance with bathing, toileting, dressing or medication.
- Shopping or collecting prescriptions except as temporary support in an emergency
- Cooking or providing meals for residents.
- Handling residents' money.
- Scheme Managers should be advised not to accept gifts unless of nominal value. They should declare any gifts to their employer.
- Scheme Managers will not be involved with the drawing up of residents' Wills.

Hours of Duty

Scheme Managers' duty hours will vary according to the size and type of scheme.

However, there are regulations that limit the hours a scheme manager can work. The Working Time Regulations 1998 mean:

- The maximum working week is 48 hours unless an employee agrees to opt out.
- A right to 11 hours continuous rest between work periods.
- A right to a day off each week.

Costs of the Scheme Manager Service

The costs of the scheme manager service will usually be included within the service charge payable by residents.

- The costs will include salary, any bonuses, employer's national insurance contribution, employer's pension contribution for the scheme manager, training and recruitment costs, and accommodation (see below).
- The annual statement of accounts provided to residents will normally give one figure for all these costs and the ARHM does not require managers to provide a breakdown of the total in the statement of accounts.
- However, on request the ARHM advises its members to break down the total scheme manager costs into the headings given above. There is no requirement to provide details of individual monthly salary slips or tax payable by a particular employee.

Cost of the Scheme Manager's Accommodation

- The cost of maintaining the accommodation will normally be recovered from the service charge.
- However, the recovery depends on the wording of particular leases and managers should check this.
- Some landlords charge a rental for the scheme manager's accommodation. The Code of Practice Chapter 20 confirms that managers should not seek a rental income on Scheme Manager accommodation on new schemes.

Resident or non- resident Scheme Manager

The ARHM does not advocate one over the other. The lease may determine whether a resident manager must be employed.

DISCLAIMER:

These notes have been prepared in the light of legislation and case law existing at the time of publication as a recommended procedure only. No liability can be accepted by the Association of Retirement Housing Managers for errors or omissions or for any loss or damage sustained by anyone

acting in accordance with these notes. If the reader is in any doubt as to the application of these notes to particular circumstances he/she should consult a Solicitor.