

# The Adaptations Process

*A guide to the stages involved, with the precise order varying according to the procedures of individual Local Authorities*

- 1. Contact with Social Services/Social Work Department**  
to request a visit from the community occupational therapist (OT).
- 2. Meeting to discuss with occupational therapist (community and/or paediatric)**  
needs and alternative schemes (lift vs extension etc.) in relation to the disability. Where possible, enlist the help of a Muscular Dystrophy Family Care Officer (FCO) or the National OT Advisor.
- 3. Assessment of equipment.**
- 4. Preliminary appointment of architectural designer.**
- 5. Decisions made in relation to adapting or re-housing,**  
and also about equipment, with the help of the architectural designer, if possible.
- 6. Estimation of preliminary costs.**
- 7. Exploration of funding**  
with Improvement Grant (Scotland) or informal Disabled Facilities Grant (DFG) 'Test of Resources' by grants officer as a means of assessing the ability of the disabled person or the family to contribute to the costs of the adaptation, and the contribution that they are likely to have to make.
- 8. Review of decision to adapt, re-house or 'new-build'**  
in the light of available funding, and approximate costs.
- 9. a. Formal appointment of architectural designer.**  
**b. Meeting to discuss details of architectural brief and equipment**  
with architectural designer, OT, FCO and, possibly, grants officer.
- 10. Submission by OT of recommendations on disability needs**  
to Grants Department.
- 11. Initial sketches drawn by architectural designer**  
who has informal discussions with the area planning officer, where appropriate.
- 12. Meeting of family, architectural designer, OT, FCO and, possibly, grants officer to:**
  - a) choose draft layout;
  - b) clarify which items will be grant eligible;
  - c) discuss architectural services to be provided. The choice is between:
    - i. drawing of plans, submission for Planning and Building Regulations Approval and writing up detailed specifications only; or preferably
    - ii. overall responsibility, as above, but also including submission of scheme for a grant, administration of the building contract and inspection of the building work.
- 13. Preparation of plan by architectural designer;**  
if agreed by family and OT, submission for Planning Approval and for Building Regulations Approval.

- 14. Drawing up of specifications (including specialist equipment)**  
by the architectural designer on receipt of Planning Approval (usually 4–8 weeks after submission). May submit for Building Regulations Approval at this stage.
- 15. Receipt of Building Regulations Approval.**
- 16. Checking of specifications**  
at meeting of disabled person and/or the family, with the architectural designer, OT and FCO.
- 17. Establishment of responsibility for inspections of work**  
(in addition to Local Authority building inspectors) is essential if the architectural designer is unable or has not been allowed to provide the full service: will inspections be provided by technical services through the Grants Department, and what responsibility will be taken by the community/paediatric OT, disabled person and/or the family?
- 18. Sending out of plan and specifications for builders' estimates or formal tenders**  
depending on the scale of the building works.
- 19. Completion of final 'Test of Resources'.**
- 20. Receipt of tenders from builders,**  
evaluation by the architectural designer, and submission (with additional paperwork) to the Grants Department.
- 21. Selection of contractor.**
- 22. Approval of grant;**  
notification to the disabled person or the family of their contribution (if any).
- 23. START of WORK.**
- 24. Work regularly inspected;**  
disabled person or the family knows whom to contact if any problems arise.
- 25. Checking of finished work against plan**  
by everyone involved *before* the builder receives final payment.