

Interim Market Position Statement Older People's Nursing, Residential, Extra Care and Homecare Services 2021 - 2022

Introduction

This interim Market Position Statement focuses on what we see as our key pressures in Derbyshire Adult Social Care during 2021-2022, for Nursing, Residential care, Extra Care and Home Care provision for older people.

This document is intended to give information and analysis which describes the type of care and support that DCC will wish to commission in the future, that will help people to increase their independence, choice and control and help us to address these pressures.

It sets out how we plan to purchase services and work with providers of care and support to promote best practice and understand the future environment and decide how to develop this in line with our vision in a post-Covid world.

Why do we need a Market Position Statement?

- To encourage commissioners, people who use services, carers and provider organisations to understand what resources are available.
- To set out what we think care provision in Derbyshire should look like in the future and why
- Duty under the Care Act (2014)
- The NHS 10 Year Plan

Who is this for?

- Existing and potential Providers of adult social care and support.
- Voluntary and community organisations as well as people interested in local business development and social enterprises.
- Derbyshire Citizens who are interested in co-producing services.



Executive Summary - Key Messages for the Market



We are now seeing a **reduction in the demand for long term residential care** which could lead to an oversupply in the current market.



There is a predicted **increase in the demand for nursing care** (and the delivery of nursing support/staffing) of which there is an undersupply in the current market.



There is an **increase in the demand for homecare**, particularly in some geographical and rural areas, of which there is an undersupply in the current market.



There is a **need for quality, affordable and suitable housing and housing with care**, of which there is an undersupply in the current market.



We do not yet fully understand people's views of accommodation and support following the impact of the pandemic and **we plan to undertake more comprehensive citizens' engagement** in the near future, to further inform our direction of travel.

Key Messages for the Market



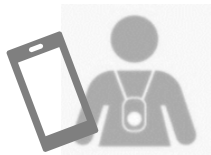
Through the Better Lives Programme, we will support Derbyshire citizens to **achieve the most independent outcome possible and live their best life regardless of age or disability.**



We need to ensure our Adult Care offer is sustainable within the current financial context.



We want to **increase the availability and responsiveness of homecare and short-term care** provision to support hospital discharge.



There is a need for an increase in the **provision of assistive technology, digital solutions, equipment and adaptations** to enable people to remain independent for longer.



We will continue to **work collaboratively with providers, to address workforce challenges and support the development of the market** to ensure access to quality care and support.

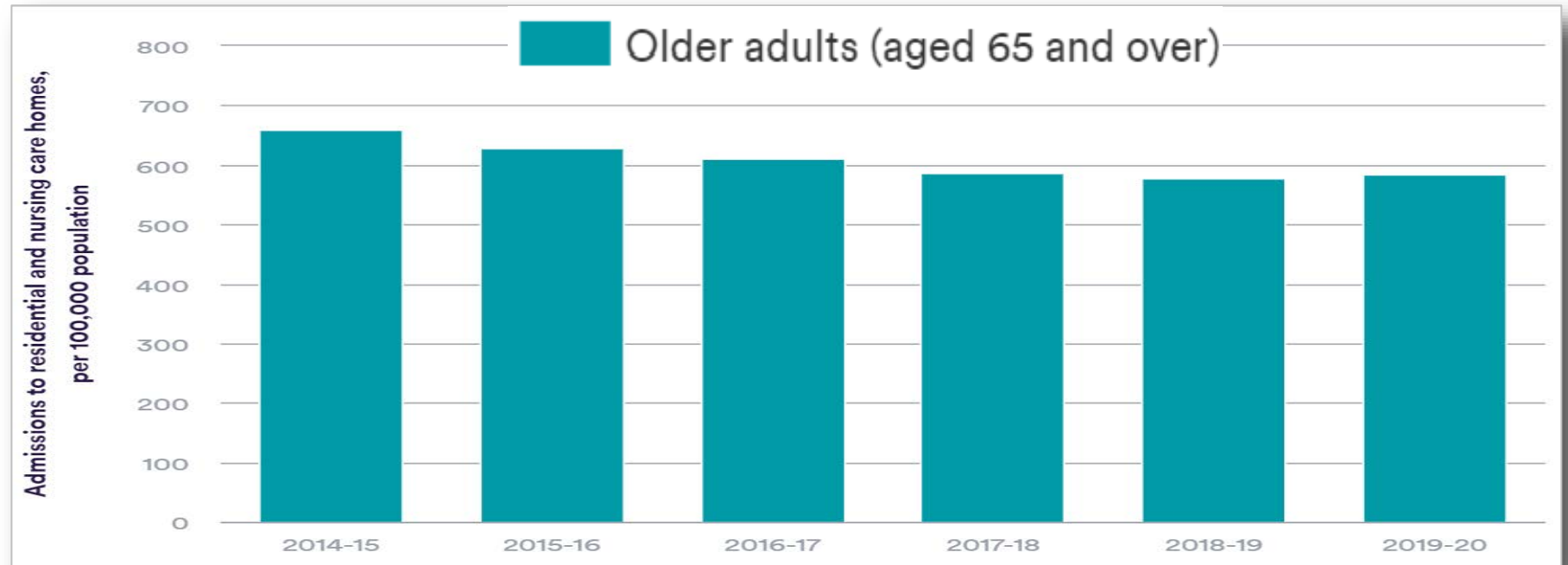


**What do we know that we want
to tell you?**

The National Picture

- ONS data from the 2011 Census tells us that from 2001 to 2011, the increase in the number of people in care homes (avg. 1.3%) did not rise in line with the general population (avg. 13%).
- Contrary to expectations, the 45% increase in the number of people aged 85+ since 2001 has not resulted in a corresponding increase in demand for residential care - in fact the opposite has occurred. There was a reduction of 4.4% in the number of people aged 85+ in residential care between 2001 and 2017 and a 10.4% reduction between 1996 and 2017 (LaingBussion 2017).
- The chart below shows that the number of Council supported admissions of older people (65+) to care homes has dropped by 11.3% over recent years, from 659 per 100,000 of the population in 2014-15 to 584 by 2019-20.

There has been an overall reduction in the number of people being admitted to long term care

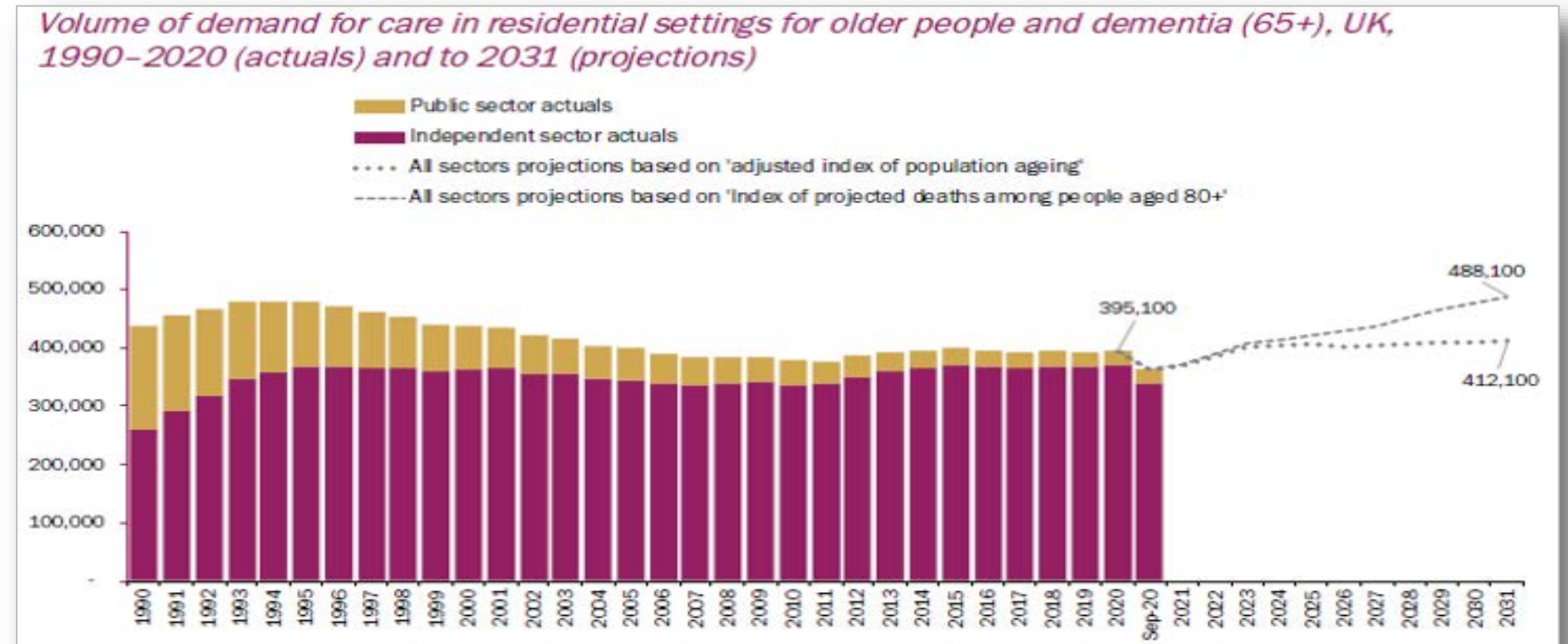


Source: NHS Digital, Measures from the Adult Social Care Outcomes Framework

The National Picture – The Future

- It is widely accepted that there will be increased demand for long-term care and support over the next 10-20 years.
- Recent modelling by Laing-Buisson (2021) suggests there will be a lower number of people accessing residential care in future than the ONS based figures suggest.
- The graph below shows two different projections for the next decade – the lower projection is in line with our current knowledge but could be further impacted by Covid-19 and more people staying at home.
- The higher figure is based upon ONS projections of deaths and an assumption that entering a care home is inevitable in later years, but we know people are choosing alternative long term care options.

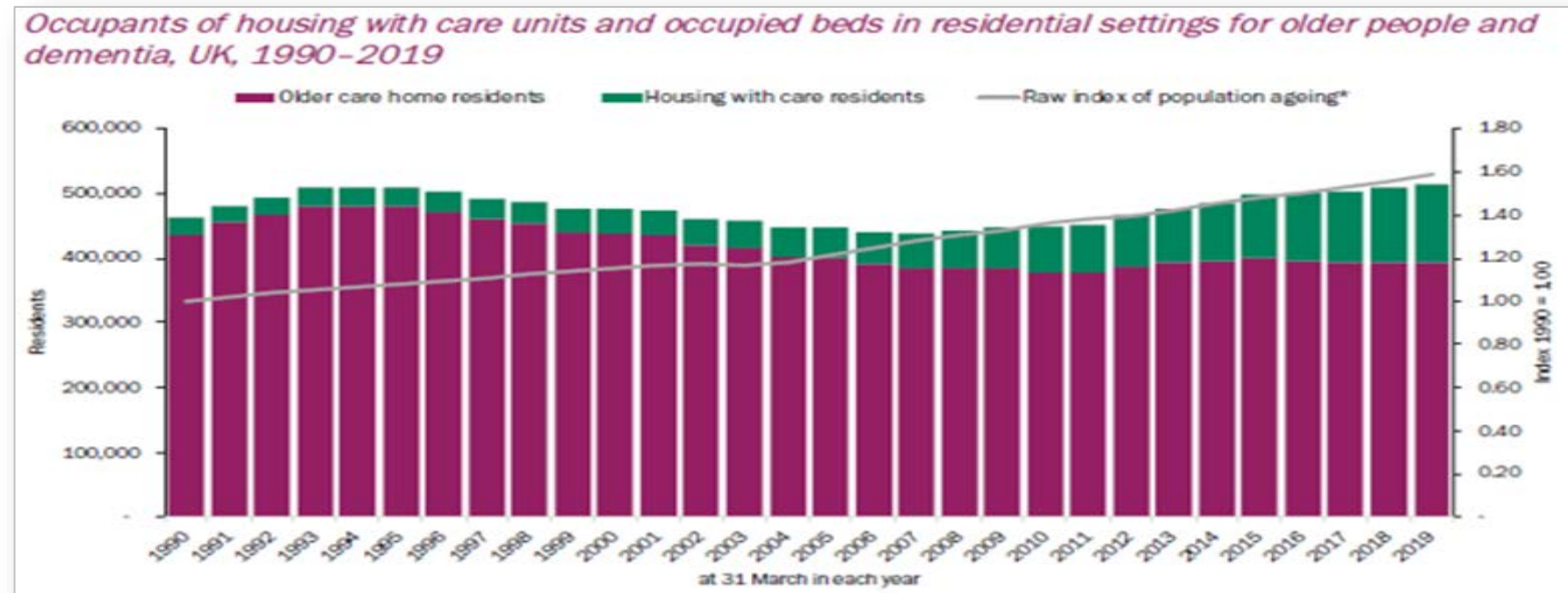
Modelling suggests fewer people will access residential care in future



The National Picture – Housing with Care

- Modelling suggests around 17,000 residential care places will be needed nationally - this may reduce further for a myriad of reasons, including improved medical treatments, changes in lifestyle and people's expectations, changes in the economic and political landscape, and other societal variations which will occur over future decades.
- Growth in the housing with care sector has been instrumental in reducing demand and is likely to continue, as is the increased use of homecare. COVID-19 has now reduced confidence in care homes.
- The graph below shows a relatively static residential care home population over the past fifteen years, against an increasing housing with care population, filling the space between residential care occupancy and increase in the number of older adults.

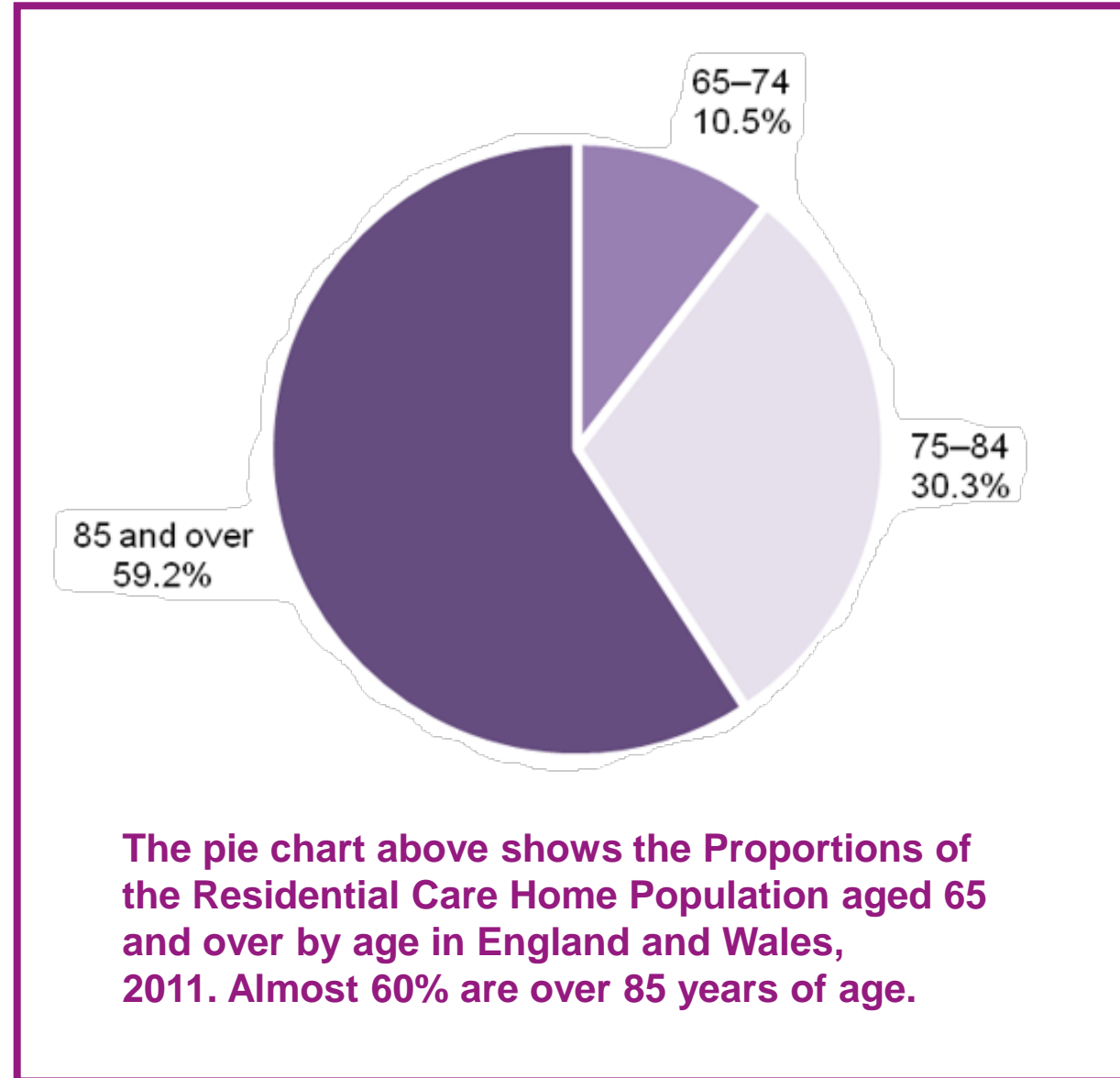
Growth in the housing with care sector and increased use of home care has reduced the demand for residential care



The National Picture – Home for Longer

People are choosing to live at home for longer and entering care homes later, with more acute needs

- We know more people are choosing to remain at home for longer or live in alternative types of long-term accommodation with care and support.
- More people are either living out their whole lives in their own homes with support, or move to a care home much later in life with increasingly complex needs.
- More people with less complex needs, who would have been in residential homes in the past, are now supported to remain at home.
- Residential home providers tell us they are now supporting people with more complex needs who would previously have had their needs met in nursing care homes.
- A survey of local authorities undertaken by The Family and Childcare Trust in 2017 found that 81% of local authorities in the UK said they had enough care home places, but only 37% reported that they had enough places in nursing homes with specialist dementia support.



The Derbyshire Picture

Care home buildings in Derbyshire

61% of homes were purpose built

39% of homes were not purpose built



There are **more self-funders** in the High Peak and Derbyshire Dales



Bed-based services	Total
Residential homes	146
Council owned residential homes	17
Extra care schemes	9
Council Community Care Centres	5



Population

By 2039 nearly 30% of people in Derbyshire will be aged 65 and over

CQC Ratings of Services



Require Improvement or Inadequate



Good or Outstanding

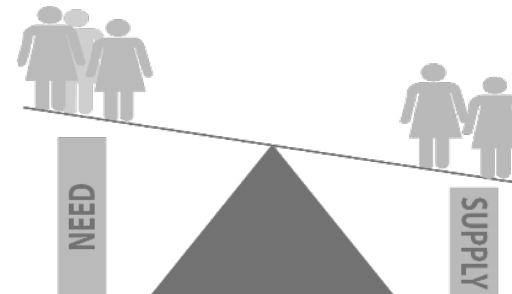
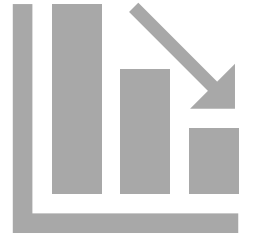
Care Providers

38 Sole Traders 26%

108 Regional/national companies 74%

Admissions to residential care homes

have reduced over the past two years (2019 and 2020)

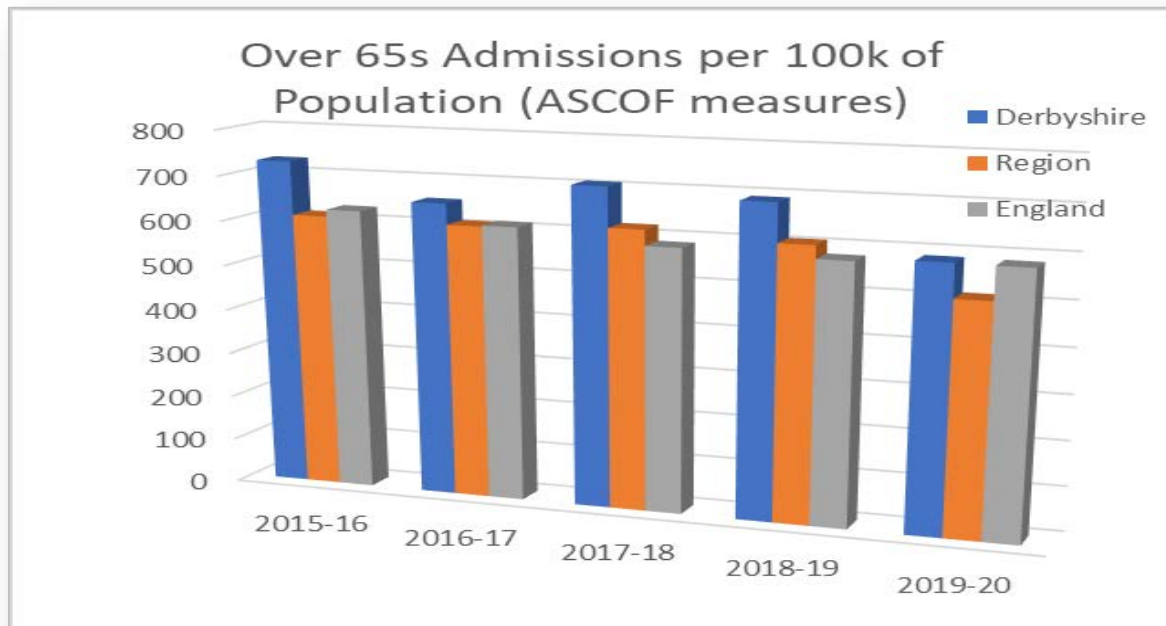


Staffing

There is a shortage of nursing and care staff, this is a particular issue in rural areas

The Derbyshire Picture – Long Term Care

- During 2018-19, the Council funded an average of 1881 placements in long-term residential care and 1308 in nursing homes every week.
- Our data shows admissions to residential care have been reducing over recent years, while the use of home care has been increasing.
- Data published by the Adult Social Care Outcomes Framework confirms the reduction but also shows Derbyshire historically, and still does, place more people aged 65+ into long-term care, compared to our regional neighbours and the average for England (see graph below).

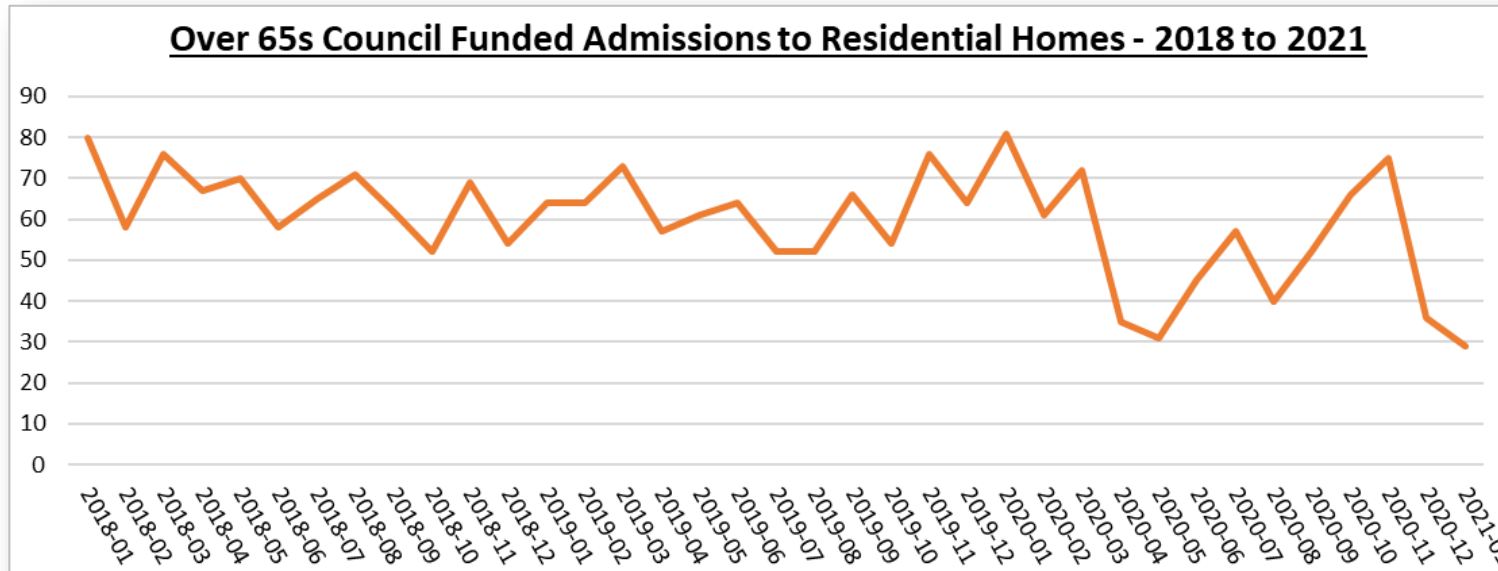


- Derbyshire's long-term care admission rate per 100,000 of population was 730.7 in 2015-16, this fell to 585.3 in 2019-20 - a drop of 25% (145.4) despite an expanding Derbyshire population.
- Local demand is following national trends and shows a period of decline prior to the pandemic
- Data from April 2020 to January 2020 confirms a significant COVID related reduction in monthly admissions to long-term care.
- By February 2021, 37% (118 of 317) of providers were reporting occupancy rates below 80%, compared with just 14 in March 2020.



- Lower levels of demand are likely to continue for an extended period: recent research by the Institute for Public Policy Research found 1/3 of people are now less likely to seek residential care for an elderly relative and 40% of over 65s are less likely to consider it for themselves.
- Fewer long-term residential placements are needed, and the shrinking market is likely to result in the closure of some establishments.

Residential Care in Derbyshire



There are currently 79 residential homes (Feb. 2021) contracted with the Council, providing a combined capacity of 2833 beds (CQC - 08/02/21).

Two are rated as outstanding, 61 are good, while 14 require improvement and 2 are inadequate.

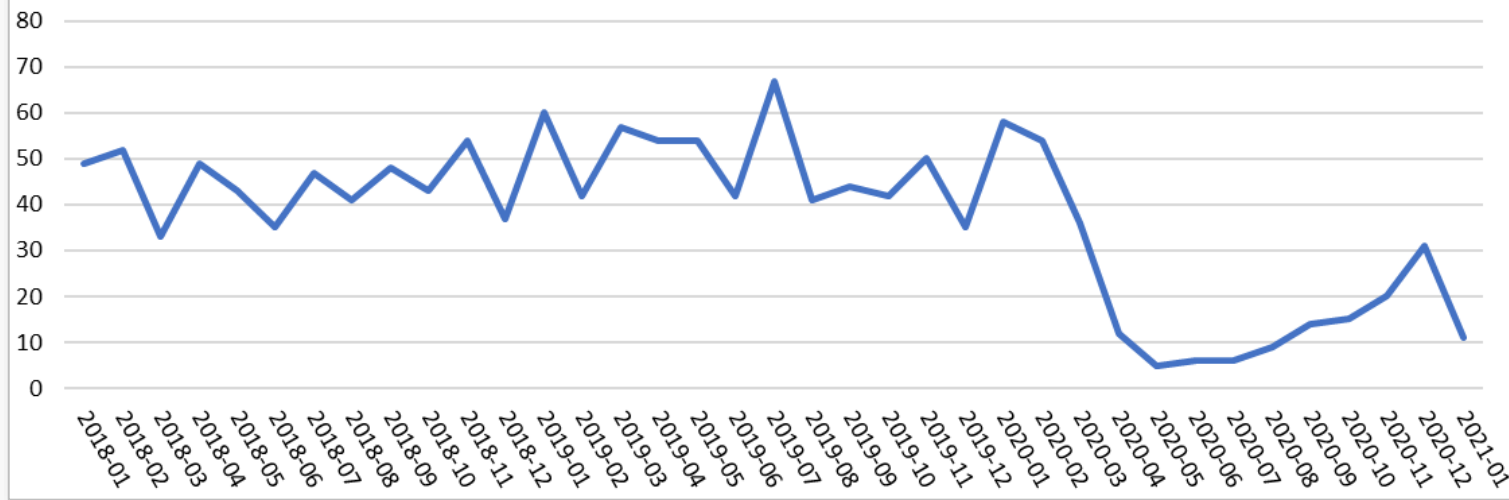
[Derbyshire Care Directory](#)

- Derbyshire data tells us **782 people funded by the Council entered long-term independent sector residential care in during 2018**, reducing by 4% to 747 in 2019, an average of 65 and 62 respectively each month.
- **During 2020, admissions fell a further 13%** to 651 for the year, giving a monthly average of 54.
- From June 2016 to March 2020, the number of vacancies reported by residential care providers each month averaged 211 (range 170-254). **Since April 2020 the average number of vacancies per month has increased by 166%** to 559 (range 524-660). The national Capacity Tracker provided vacancy data from April 2020, which encouraged greater transparency for self reporting vacant beds.
- The graph on this page shows the **ongoing trend of declining council funded admissions to residential care** from January 2018 to January 2021.

Nursing Care in Derbyshire



Over 65s Council Funded Admissions to Nursing Homes - 2018 to 2021

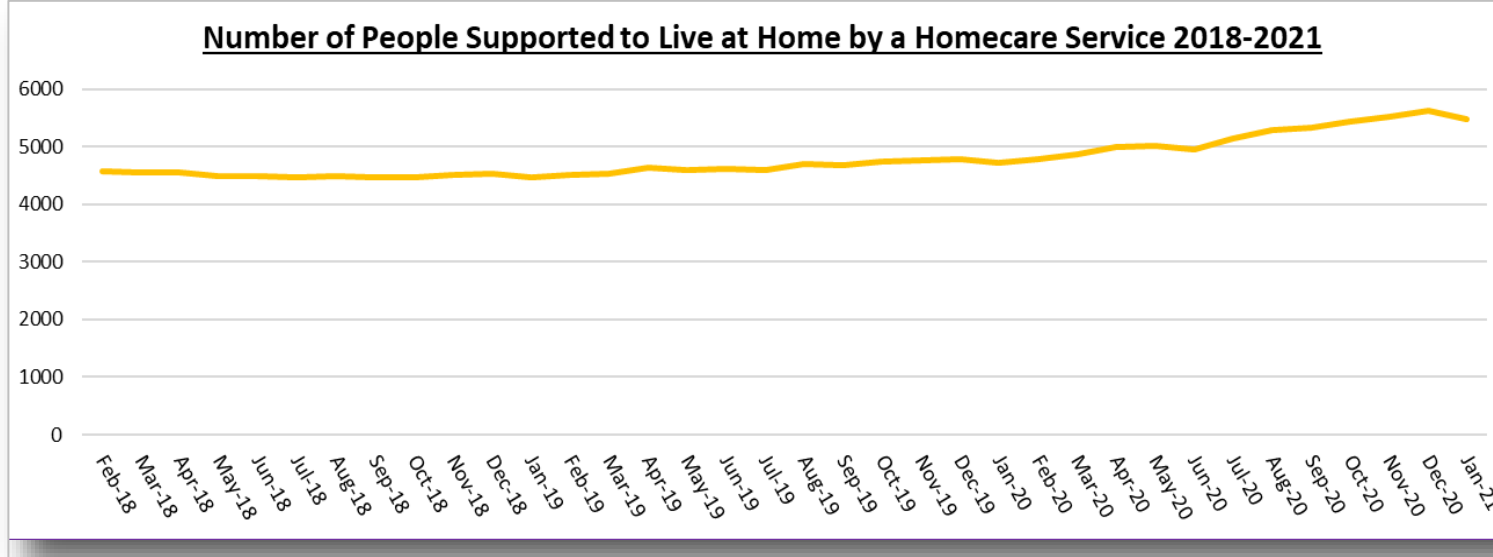


The Council contracts with 67 (Feb. 2021) establishments registered to provide nursing care in Derbyshire, together they have a capacity of 2983 beds (CQC - 08/02/21). Two are rated as outstanding, 47 are good, while 15 require improvement and 2 are inadequate (plus 1 yet to be inspected).

[Derbyshire Care Directory](#)

- Derbyshire data tells us **531 people funded by the Council entered long-term independent sector nursing care during 2018, increasing by 11% to 588 in 2019**, an average of 44 and 49 respectively, each month.
- **Total admissions during 2020 fell by 55% to 266**, a monthly average of 22. There has been a drop in Nursing Care placements during the pandemic, but **demand is expected to grow based on our increasing ageing population with complex needs.**
- From June 2016 to March 2020, the number of vacancies reported by nursing care providers each month averaged 214 (range 156-270), **from April 2020 to January 2021 the average number of vacancies per month was 508 (range 455-560), an increase of 137%.**
- The graph on this page shows **the increasing demand from January 2018 for council funded nursing placements** and the subsequent reduced demand during 2020 and the pandemic.

Home Care in Derbyshire



As of February 2021, the Council contracts with 57 companies registered to provide home care and support in Derbyshire.

There are no companies currently rated as outstanding by CQC but 50 are good, while 6 require improvement and 1 is yet to be inspected (26/02/21).

[Derbyshire Care Directory](#)

- Demand for homecare services from people who live in their own homes and are aged 65 and over, has been increasing at pace. An average of **4504 people were supported by home care services every month during 2018. This increased by 3% to 4656 during 2019.**
- **The number of people supported during 2020 increased by a significant 12%**, or 5,201 per month average, in spite of people withdrawing from care due to the perceived risk of COVID infection. 5,439 people were supported in January 2021 and our area demand figures tell us that over the last 12 months on average there were **102 people waiting for a service** – this figure includes people currently without support and others who may already receive support but need to change the type of support or provider, e.g. transferring from short-term to long-term services and hospital discharges.
- Our data also tells us that in Q3 of 2020-21 (Oct - Dec 2020) 129 or **87.7% of people referred to the Council after being discharged from hospital were supported to remain at home.**
- There are particular challenges in recruiting and retaining home care staff in the rural areas of Derbyshire.

The Cost of Care in Derbyshire

During 2019/20, the Council spent **£263 million** on services for adults in Derbyshire, of this, **£113 million** was spent on services for older people. The 2019/20 costs of older people's accommodation and homecare support are summarised in the graph on this page.

Overall expenditure for 2020/21 increased to **£264.5 million** and the budget for 2021/22 has risen again to **£266.3 million**.

Each year the Council undertakes fee setting to review and take account of the inflationary costs impacting on care providers and the services they deliver. Further information about current residential and nursing Care fee rates are available [on our website](#).

Derbyshire offers nursing and residential care home providers a **Dementia Care Payment** to encourage the use of evidence based standards in relation to dementia care practice and the care environment. This contributes towards the additional costs incurred supporting an individual with dementia.



Engagement and Key Themes

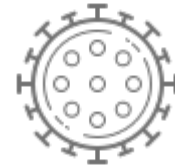
- During early 2021 an engagement exercise was undertaken to gather information about what is important to people when making decisions about their care and support, and where they live.
- We heard from 106 respondents who provided a range of important feedback.
- It is important to note that the impact of the Covid-19 pandemic will have been at the forefront of people's minds - we hope to run a broader engagement exercise at a future date.
- Following analysis of the responses we have extracted the following **key themes**:



Quality of Care very important – people cited positive examples of person-centred care.



Choice and Control over care provision very important



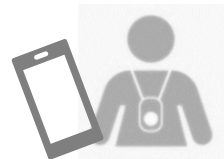
Increased **Social Isolation** was cited by many people and having increased due to Covid-19.



The majority of respondents did **not want to go into a care home**



Desire to receive support that increases **independence and confidence**.



Equipment and Adaptations have had a positive impact on keeping the person in their own home.



People overwhelmingly wanted to **stay in their own home as long as possible**.



Improved support for carers was highlighted as important by many.

What People Told Us

The key themes and what people told us **support the direction of travel that more people want to stay living in their own homes** and communities but with the right care, support and accommodation.

“I want to care for my wife at home with support from carers as long as possible”

“I would like to see people as I felt lonely even before the pandemic. If not for the carers, I wouldn't see anyone”

“My home has been adapted to help me to remain here for as long as possible”

“I would be concerned about the regularity of care. My mum's carers never turned up on time.”



“There is a lack of accessible premises where you can meet people over 80 to have social time with”

“I don't think I can live in my own home for much longer as it doesn't meet my needs, however I don't want to be put in a care home”

“I have promised to keep my mother-in-law in our own home for the rest of her life.”

“I can't care for someone if I don't have the care and support in the future.”



What are we doing about it?

Working Together Across the System

People have also told us they want services that work together with all stakeholders, to improve quality and develop the range of support options available.

We are working to join up health and social care because we know people want seamless services that talk to each other and support each other, and we know providers want consistency from Commissioners.

Joined Up Care Derbyshire brings together NHS organisations, local authorities and the voluntary sector working together to improve health and social care outcomes for local people.

Joined Up Care Derbyshire is moving towards an **Integrated Care System** model which will increasingly have a critical role in shaping health and social care delivery in local areas.

Our combined focus across Derbyshire will be to support people to stay well, living independently at home for longer.



Derbyshire Better Lives Programme

People have told us they want more innovative support options, now and in the future.

The Council's Better Lives Programme was established to redesign existing services to ensure that we are putting people at the heart of everything we do, to challenge the old ways of thinking and to make sure the right solutions are available in the right place, at the right time.

It is about maximising and regaining independence and reducing the need for intervention, focussing on resilience, social connection and health and wellbeing.

There is a clear link between the outcomes we seek to achieve via our Better Lives Transformation Programme and our vision to ensure a range of housing and care options will be available for all Derbyshire residents.

The programme is expected to provide a springboard for imaginative partnerships and ventures with Providers and Developers, to introduce greater investment into the care and support sector.



We consider certain parts of the market to be critical to the Better Lives vision:

- Expanding community based support
- Improving specialist nursing care provision
- Increasing age designated housing options

Key Challenges – Covid-19



Whilst the Covid-19 pandemic has highlighted the importance of care, it has also raised many questions about the perception of care homes as a safe environment. We have seen a reluctance in the take up of long-term residential care, as fears around contracting the virus, the imposition of visiting restrictions, being cut off from loved ones and the possibility of dying alone have been apparent.



We recognise that Covid-19 has affected the market. There have been several financial interventions from National Government to support the social care sector. We know care homes have been doing their utmost to keep their residents safe and well in these most challenging circumstances.



We will continue to work collaboratively and share intelligence on the changing care market to inform commissioning activity, enable care providers to make informed decisions and support service development in response to the ongoing challenges of the pandemic over the next 12-18 months.



The Council, along with Derby and Derbyshire Clinical Commissioning Group are very grateful for the system response to the Covid-19 pandemic from local providers, who have risen to the challenges, responded quickly and been prepared to deliver services differently.

Key Challenges - Workforce



We recognise there are challenges in terms of recruiting and retraining appropriately skilled staff, especially regarding nursing care and dementia specialisms. We are working to ensure that these workforce challenges are addressed through Joined up Careers Derbyshire.

Joined Up Careers
Derbyshire

Joined Up Careers Derbyshire brings together local partner organisations to support the current and future health and social care workforce. It seeks to find the best candidates for roles within the health and social care sector and support them on their career journey. Find out more on the [Joined Up Careers website](#)



We are keen to hear from providers who would be prepared to work alongside us and health partners to test and prototype innovative solutions to support and strengthen the workforce.



Over the coming years we want to work collaboratively with providers and health colleagues to ensure that there is an integrated approach to the workforce to ensure that we have the right talent mix across the sector.



What do we need?

Summary: Market Planning - Community

We need to **strengthen the sustainability of our care market** and increase our commitment to support local people to live independently in their own communities.

We expect to do this by **investing in a range of alternative models of care.**

Housing for rent or sale including new build developments, the reuse of sites and re-modelling of existing provision

Supported living and Extra Care facilities for mixed communities and in different localities

Increasing **homecare** and **short term care** provision

Quality, affordable and suitable housing and housing with care options

Housing and accommodation that can **support people with dementia**

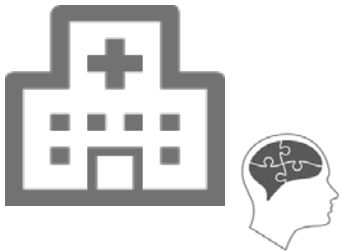
Provision of **assistive technology, digital solutions, equipment and adaptations** to support independence

Community Support Beds that enable timely hospital discharge and promote reablement



Summary: Market Planning - Nursing, Complex and Specialist

We also want to support new and existing Providers to develop care models in Derbyshire that will ensure:



Affordable **nursing care** that will support people with more **complex needs and dementia**.



Residential care that supports older people with **complex needs**



A care market that supports **self-funders**, as well as those funded by the Local Authority and the NHS



A predicted **increase in nursing home capacity**



Work with us in Derbyshire

Work in Partnership With Us

- We are really keen to work in partnership with providers and investors to deliver the aims and ambitions outlined in this document.
- We can support with engagement, consultation and co-production opportunities with older people.
- We have a number of care provider networks that we want to work with proactively to help improve the market so our residents have a variety of high quality options available should they require care and support.
- We want to have conversations about how we can expand choice of provision, particularly for older people staying at home for longer.
- We can support providers looking to build new housing with care for older people to have further conversations with our planning team.
- We work closely with partners including District and Borough Councils, [NHS Derby and Derbyshire CCG](#), [Homes England](#), [Public Sector PLC](#) and [Skills for Care](#).
- We're a great Council to work with, **we're open for business, come and talk to us!**

We are open for business, come and talk to us



We want you to invest and be part of our development

How We Work With Local Partners

We are working proactively with local district and borough councils regarding land use planning and actively commenting on planning applications.

We are also encouraging local planning authorities to think about accessible design standards in all types of older people's housing, including residential and nursing care.

For large strategic sites and local planning development, we are encouraging local district and boroughs to include opportunities for older people's housing development, including where appropriate residential and nursing care, but also some of the more innovative housing models.

The council owns a number of pieces of land that could be released to support older people's housing developments and for a number of these we are collaborating with Homes England.

We are seeking to work proactively with any developers / providers interested in pursuing development opportunities and would welcome discussions.

Please contact us at asch.ac-commissioning@derbyshire.gov.uk

In December 2020 we held a virtual Investment Event to share key information about our future accommodation and care needs.

Presentations were also provided by Homes England, Skills for Care and Public Sector PLC.

We outlined a need for:

- A range of affordable **independent living options for older people countywide.**
- **Affordable housing with care** in towns such as **Belper, Heanor, Ripley, north Bolsover, Chesterfield, Matlock, Ashbourne and towns across High Peak.**
- Additional **affordable nursing care** provision across Derbyshire.

Our Investment Event information pack is available on [our website](#).

Further Information

Further demographic need analysis and information linked to the Derbyshire Joint Strategic Needs Assessment is available on the [Derbyshire Observatory website](#).

The Council plans to develop a detailed investment prospectus to invite the right kind of housing developers to respond to identified gaps in the next 12-18 months

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