

People and Families Policy & Scrutiny

ASC residential and domiciliary trends

July 2021



Essex County Council

Scale of existing Market

Data collated in June 2021

Essex County Council spends approximately £528.1m in the 2021/22 financial year on services. It should be noted that a proportion of this spend will be with providers who do not have a base within the administrative area of ECC. The activity figures shown below relate to the Essex Market only as this is the market we will be able to influence and shape.

Detailed below is the Adult Social Care Spend within each market for 2021/22. The residential figures below include nursing spend of £31.8m for Older People, £0.7m for Adults with Disabilities and £0.6m for Mental Health. An additional spend of £78.809 Million was injected into the market to support the COVID Pandemic during 20/21.

Older People Residential Care Market

£124.9m per year
216 Homes
10,546 Beds
3,356 ECC Adults

AWD Residential Care Market

£84.9m per year
150 Homes
1,514 Beds
684 ECC Adults

Mental Health Residential Care Market

£8.4m per year
38 Homes
322 Beds
123 ECC Adults

Supported Living Market

£73.5m per year
377 Schemes
1,495 Units
1,321 ECC Adults

Equipment Services

£9.5m per year
152,780 Pieces of
Equipment Delivered
in 20/21

COVID DHSC Grants

20/21 £36.445 Million
21/22 £9.227 Million

Reablement Services Market

£22.1 Million per year
13,000 hours of care per
week
15 Beds
6 Providers

Domiciliary Care Market

£117.4m per year
271 Agencies
4,961 ECC Adults

Day Opportunities Market

£20.4m per year
83 Day Centres
691 ECC Adults

Extra Care Housing Market

£1m per year
14 Schemes
638 Units
165 ECC Adults

Direct Payments

£66m per year
2,746 Adults

Other COVID Support

20/21 £32.7 Million
21/22 £14.559 Million

*Caveats Financial Information 20/21

* Adult Numbers are current numbers

Market Quality

Data collated in June 2021

The information provided currently focuses on the quality of Essex County Council commissioned Service/Market. Approximately 78% of the Essex Market that we commission services with is good or outstanding.

From current the residential capacity, the occupancy across the market is:

- Older People Residential Market: 8,092 Total Occupied Beds/77% Occupancy
- AWD Residential Care Market: 1,343 Total Occupied Beds/ 89% Occupancy
- Mental Health Residential Care: 257 Total Occupied Beds/ 80% Occupancy

Within our Domiciliary Market we have approximately 271 Agencies that provide care to 10,892 Total Adults across Essex. Only 4,961 of these Adults are managed by Essex County Council.

CQC does not regulate Direct Payments, Day Opportunities or Equipment Services.

Direct Payments

Not Regulated

**Day Opportunities
Market**

Not Regulated

**Equipment
Services**

Not Regulated

Older People Residential Care Market

CQC Outstanding Rate: 3%

Good Rate: 77%

AWD Residential Care Market

CQC Outstanding Rate: 1%

Good Rate: 87%

Domiciliary Care Market

CQC Outstanding Rate: 4%

Good Rate: 63%

Extra Care Housing Market

CQC Outstanding Rate: 0%

Good Rate: 92%

Reablement Services Market

CQC Outstanding Rate: 8%

Good Rate: 67%

Supported Living Market

CQC Outstanding Rate: 14%

Good Rate: 66%

Mental Health Residential Care Market

CQC Outstanding Rate: 3%

Good Rate: 86%

Scale of our Adult Cohort

Data collated in June 2021

Out of a population of 1.4 Million we have 311,300 people aged 65+ and 42,400 aged 85+ , this equates to approximately 25% of the Essex Population. We currently provide Services to approximately 16,500 Adults.

By 2025 it is forecasted that we will have an additional increase of 7.2% of over 65+ to approximately 333,800, and an increase of 9.2% people aged 85+ which is approximately 46,400 Adults. This indicates that there will be likely increase of services provided by Essex County Council. Additional work is required to understand our future Adult demography.

In terms of unpaid Carers, Essex has 3091 unpaid carers supporting residents that are known to us, it is estimated that the true figure of unpaid carers in Essex is 200,000 which is 14% of the Essex population. 25% of ECC workforce are unpaid carers themselves.

Essex Paid Workforce

Essex has approximately 33,000 Employees working across our care sector. From this there are approximately 36,000 jobs which is equivalent to 26,000 full time employees. Out of the 33,000 employees 24,500 carers which equates to 74% provide direct care Adults.

2,080
People with
Physical,
Sensory &
Impairment

5,500 people
used reablement
services to help
them regain
independence

8,900
Older People
with services

4,767 people
with Learning
Disabilities

1,700
People with
Dementia

795 people
with Mental
Health needs

9,800
Residential Care Workers

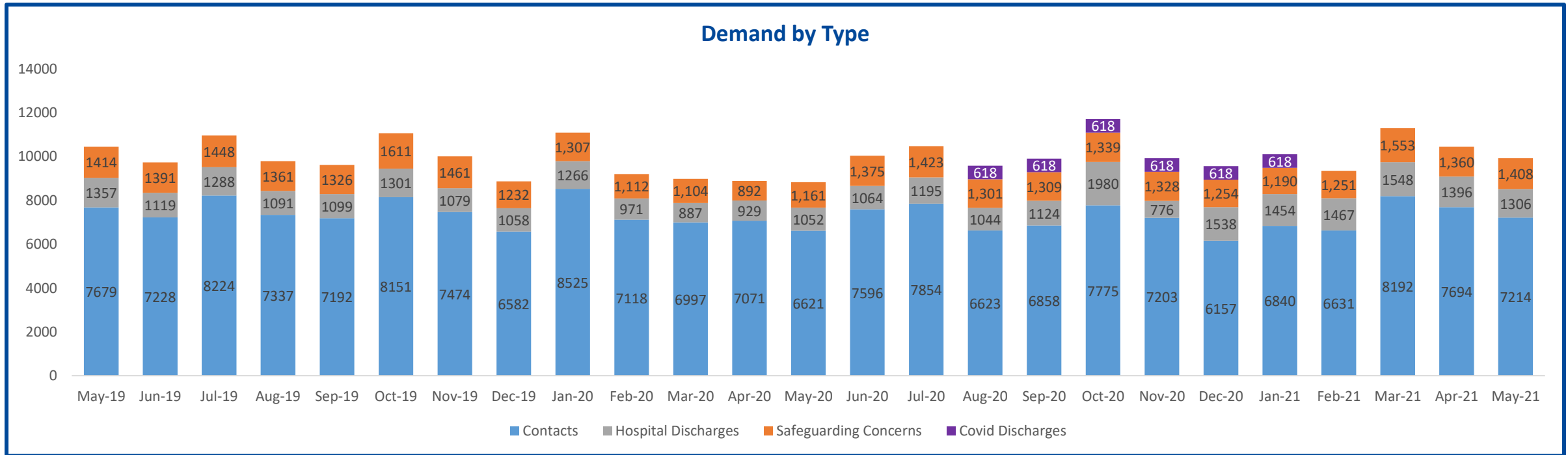
5,800
Nursing Care Workers

13,500
Non Residential Care
Workers

4,100
Non Regulated Care
Workers

What are the demand trends affecting ASC?

- Demand in 21-22 has returned to similar levels seen in 19-20



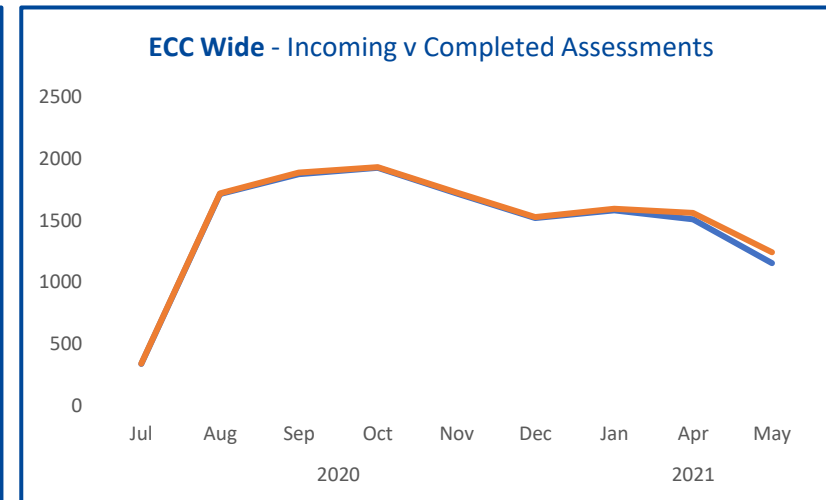
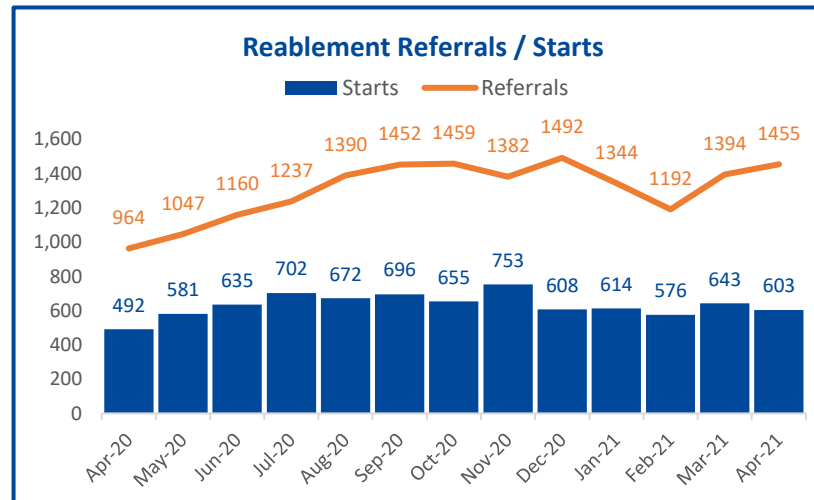
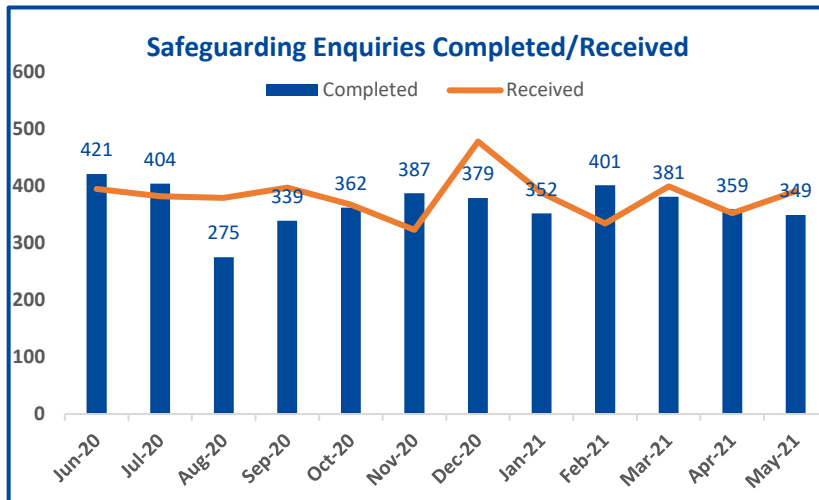
Comments:

- Incoming safeguarding concerns over the past 3 months remain at the top of the recent level (12 month trend)

Note : Covid discharges were discharges from hospital pre-Aug 20 who were then assessed under scheme 1 of the discharge to assess scheme between Aug 20 and Jann 21. The decision was taken in August to represent these as an equal amount of demand coming into the service each month over the 6 months the work was undertaken.

What activity are we undertaking in response to this demand?

- The service has been able to keep pace with incoming assessments
- Following 3 months of keeping pace with incoming safeguarding enquiries, May saw more enquiries incoming than were completed
- Referrals into reablement are increasing but capacity currently capped



Comments:

- Connect Programme rolling out new ways of working designed to increase the number of people who can benefit from reablement by reducing the average length of stay.
- This includes introducing new alignments to locality based working and new data at a team level, to help show and manage allocation rates
- Some ECL staffing issues in South East and in West have meant ECL unable to accept the numbers we would expect in those areas.

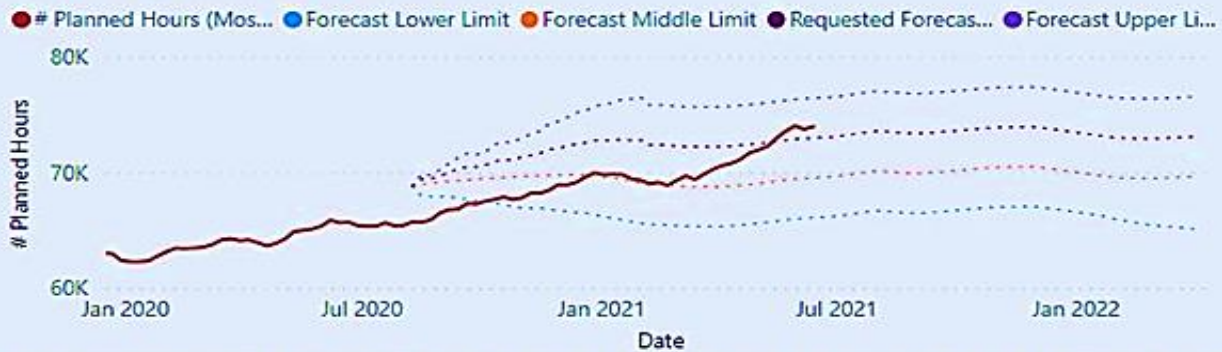
COVID Activities

Essex County Council has supported or introduced several schemes, to support the market and Adults during the pandemic, including:

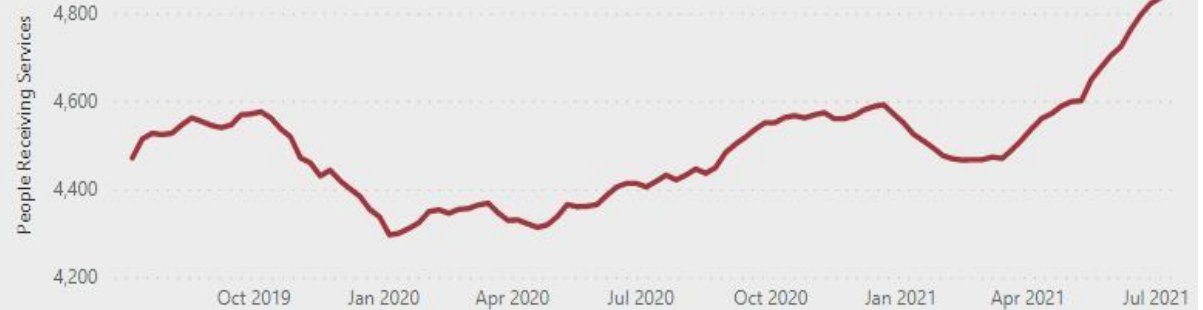
- Establishing and administering of Covid related funding to support providers, where impacted financially
- Establishment of PPE supply chains, storage and distribution channels to support providers
- Care Home Hubs – multi disciplinary teams across health and social care brought together to review and support care homes
- Establishment of Provider of Last Resort - provision of additional care workers to support care homes and domiciliary care providers to continue to deliver safe care when workforce availability compromised due to self-isolation or other covid related pressures
- Provider communications – daily updates to providers via the Provider Information Hub and establishing a helpdesk to provide further support
- Establishment of Designated Settings to provide a temporary place of residence for Adults requiring residential care with a positive Covid test or needing to self-isolate
- Block purchasing of residential beds to support the system

Older People - Domiciliary Care

Domiciliary Care (Planned Hours)



People Receiving Services Over The Last 2 Years



Market Pre-Pandemic

- Gradual increase in domiciliary care
- Overall good capacity in the market, with exception of a small number of hard to source locations

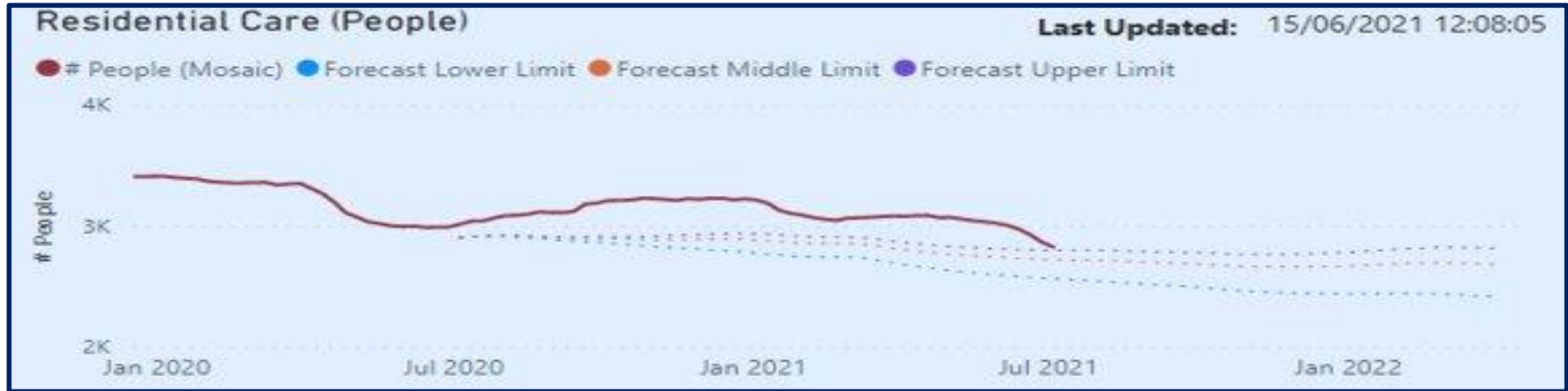
How has the Market changed

- Demand for domiciliary care has increased significantly since Jan 2020. This is primarily linked to an increase in the number of Adults receiving a service, but also due to an increase in the average package size.
- Capacity largely unimpacted during wave 1 and wave 2.
- Recruitment and retention was not an issue during wave 1 and wave 2 of the pandemic.

Emerging Trends post- COVID

- Providers advising that recruitment and retention is becoming more difficult, as other sectors open up offering higher salaries.
- Providers reporting workforce exhaustion and burnout – less able to rely on overtime to deliver capacity.
- The volume of package hand backs and unsourced packages is slowly starting to increase. There has been a spike of a 30% increase in hand backs since mid / end June 21, focused mainly in the Brentwood and Chelmsford districts. Unmet needs, whilst low, have started to increase over the last month
- Potential mandating of vaccinations in this sector could impact workforce capacity (up to 15%)

Older People - Residential and Nursing Care



Market Pre-Pandemic

- Gradual decline in demand for residential care
- Difficulty sourcing some complex care and nursing care
- Average occupancy levels required to be sustainable - 92%

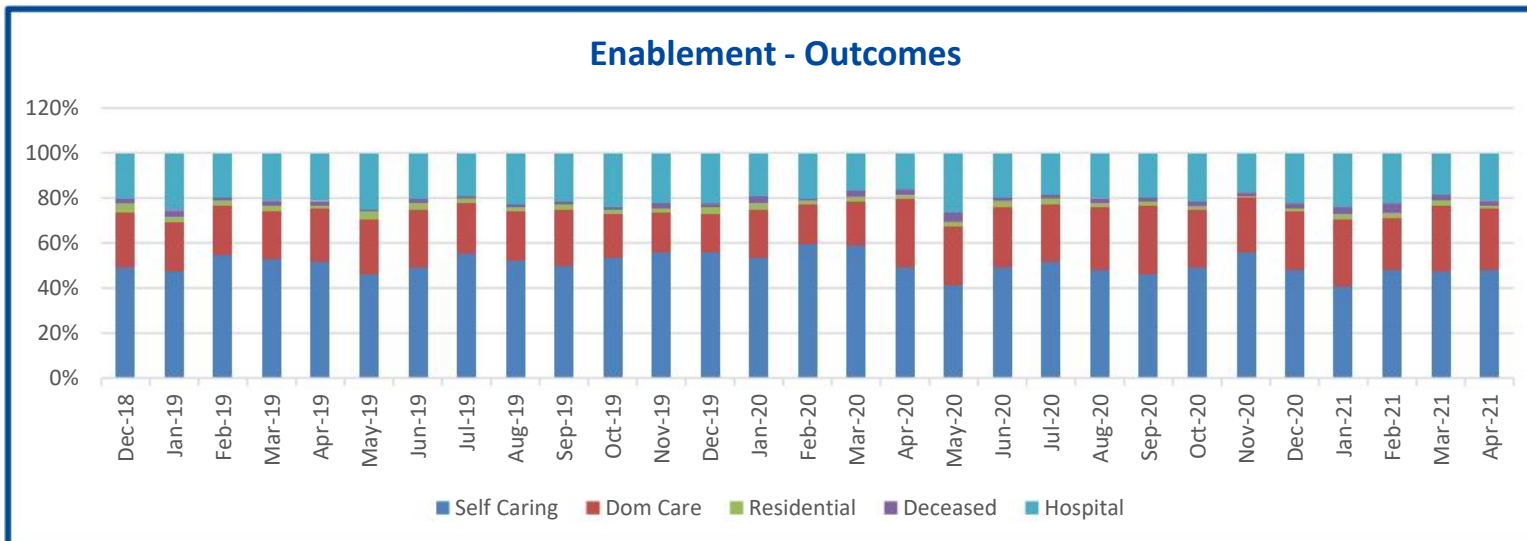
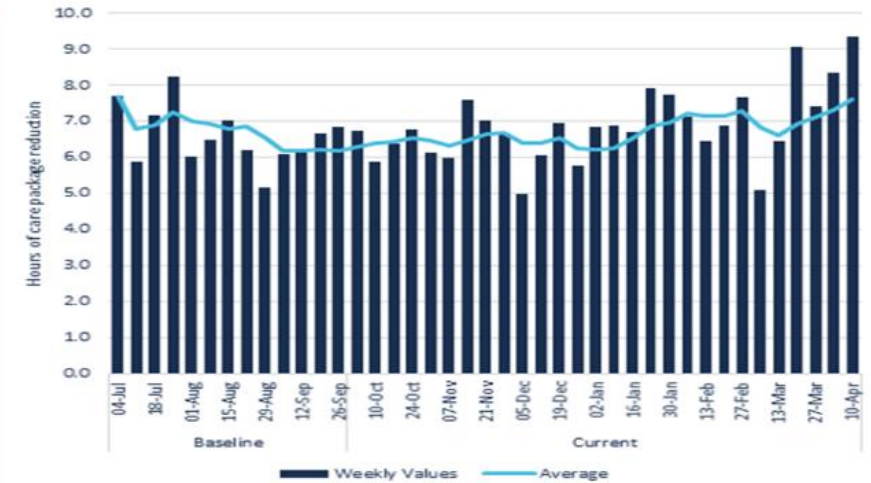
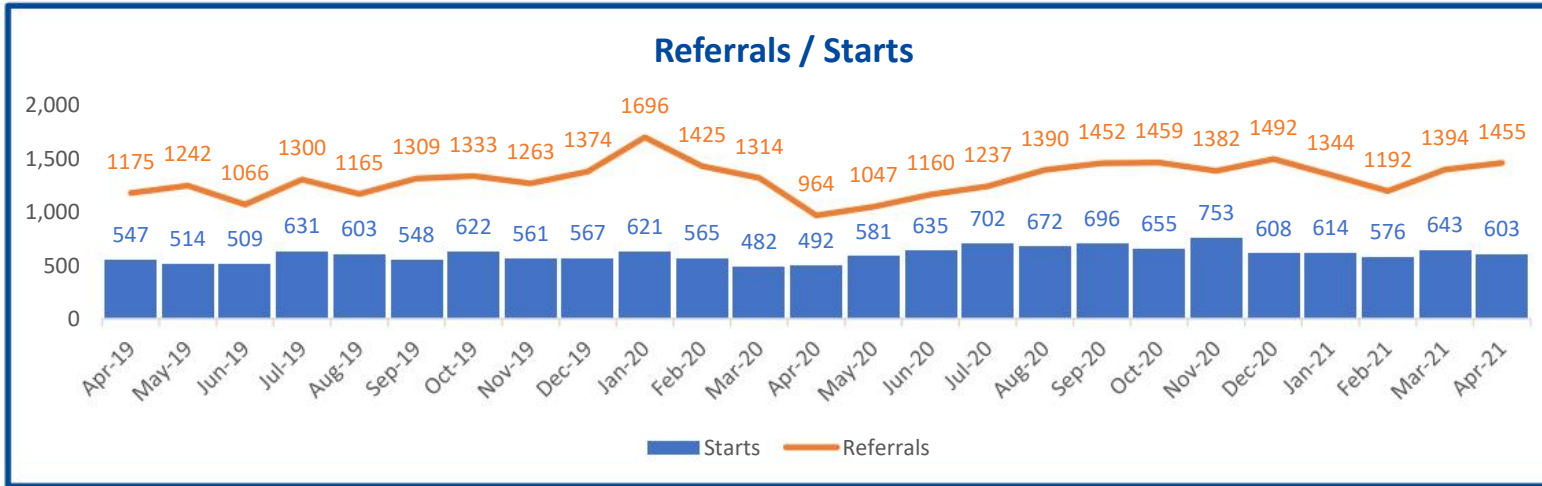
How has the Market changed

- Sadly, significant deaths of residents during wave 1 and 2, impacting occupancy levels
- Limited number of self funders choosing to move to a care home
- 3 care home closures since April 21. Several care homes expressing concern regards future viability. Covid funding may be delaying some care home closures (providing financial support to the market)
- Provider of Last Resort (POLR) required to support care homes with significant staff required to self-isolate
- Residential Care Market Capacity Tracker in Essex is currently showing 19.4% reported Bed Vacancy
- West Quadrant is showing the highest vacancy rate of 24%

Emerging Trends post- COVID

- Greater levels of acuity
- ECC is reviewing the cost of care
- On going challenges around recruitment and retention.
- Mandating of vaccinations may impact workforce capacity further (up to 15%)
- Homes in less demand may not survive longer term.

Reablement (ECL only) Older People



- Average % self-caring in 19/20 was 53%, throughout 20/21 the monthly average was 48%
- The average number of hours reduced remains above benchmark (7.1 vs 6.7)
- We are testing the view whether adults are coming into the service with higher initial need as a possible contributor to the increasing demand for Dom Care from older adults.

* Referrals data is every referral (an adult can be referred multiple times) – Starts are starts with ECL only, ILOR and Spot not currently included

Working Age Adult Market

AWD Residential

Supported Living

Mental Health Residential

Market Pre-Pandemic

- Recruitment of carers was an issue across all AWD and MH services pre-pandemic with providers reporting low levels of applications for jobs particularly for carers that can drive.
- Quality of the recruits that were coming through was reportedly low with very few candidates of the requisite quality coming through.
- Prices were stable for new placements but there was a lot of discussion around uplift of historical packages, particularly in residential services.
- There was a buoyant market for development of new services in supported living particularly, but also within residential services.
- Provider failure was at a low level, and lower still within the categories and areas of need in Essex (i.e. complex provision)
- Relationships with providers were positive and levels of engagement had increased through things like market-wide forums and face to face meetings at services in the community.
- Demand for services was high, particularly in supported living and for complex services. There was however a lack of complex services to meet the needs which resulted in delays in discharge in some cases, or temporary arrangements being made that did not best meet the needs of the adult.

How the Market has changed

- The workforce in social care have been exceptional through the pandemic but will be jaded from the effort exerted.
- At present the financial support from central Government means the costs providers are facing for things like PPE and infection control measures are being picked up but as and when that funding is removed we may see an increase in requests from providers for uplifts in order to factor in any ongoing costs as a result of enduring change to practice.
- Care workers are still paid around the minimum wage level and so any increases to this will put financial pressure on providers that ECC will need to cover. Equally this may push people out of care where higher wages are on offer for less challenging jobs in industries experiencing a post-pandemic bounce, like hospitality.
- Demand has not gone away in AWD and MH services and will continue to need to be met. Mental health services could see an increase in demand as a result of the effect of the pandemic and adults may also present with chronic health conditions as a result of covid infection which could impact the number of physical disability services required.
- Development of new accommodation based services may be challenged by the increase in property prices and the response of the market to demand following the pandemic. Where property costs increase providers will need a greater return to make it a viable solution and this could result in requests for higher costs for services.

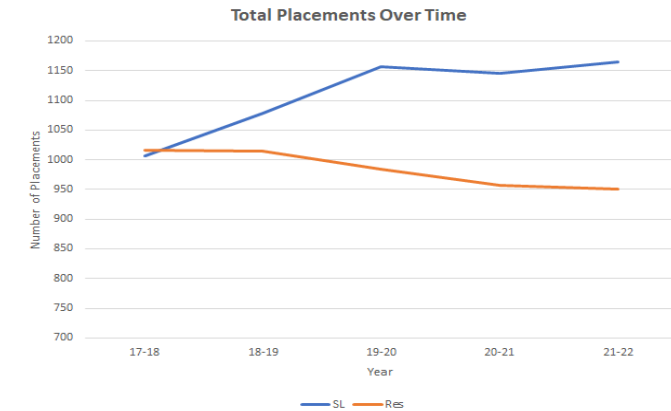
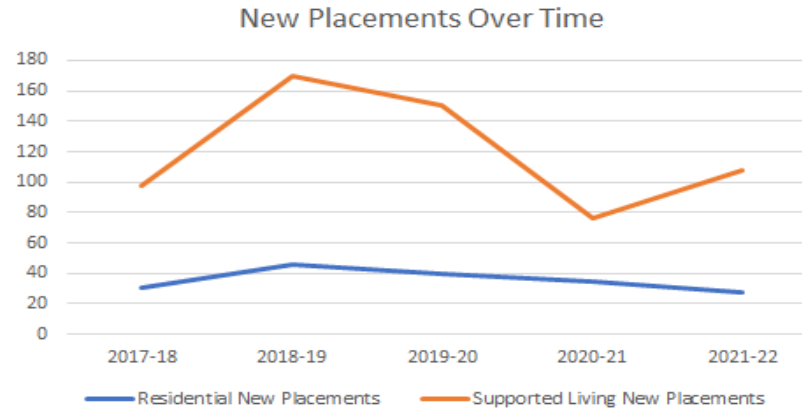
Working Age Adult Market

AWD Residential

Supported Living

Mental Health Residential

This shows the number of new placements made each year into both AWD supported living and residential services, including a projected total for this year.



- This shows total placements over time in both residential and supported living.
- There is decline in residential against the increase showing for supported living services

Emerging Trends post- COVID

- This shows that the market is stable and is still working towards our strategic objectives.
- Recruitment remains an issue and providers are concerned that the reopening of the economy will create further competition in the same pool of staff that would work in care.
- A number of people who entered care during the pandemic may now leave the sector which along with the increased competition for available staff could result in a drain on the existing workforce.
- Prices remain stable, and discussion around historical placements has subsided following the work in the pre-pandemic years to ensure a sustainable market.
- Development is showing signs of picking back up with a number of providers on our Supported Living Framework bringing forward proposals and discussions with providers on new complex accommodation continuing.
- Provider failure has remained at a low level and the majority of closure of services is a result of commercial decisions by providers rather than financial viability.
- Relationships with providers remain positive and many have expressed gratitude for the level of support that ECC had provided through the pandemic both financially and operationally.
- Demand is increasing again for services and there is a backlog to be worked through where pent-up demand has built through the pandemic. This is more pronounced in lower acuity services because these are the placements more likely to have been paused through the Pandemic.