Care and Support Market Sustainability Strategy – Technical Annex

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The information and data included within these appendices is intended to underpin and substantiate the aspirations developed within the Care and Support Market Sustainability Strategy. The data is correct to the best of our knowledge at February 2021.

Appendix A – Improving Quality: Personalisation Research Examples

- The Wigan Deal Lessons from the Wigan Deal | The King's Fund
- Building Community Capacity Building-Community-Capacity-Case-Studies-.pdf (thinklocalactpersonal.org.uk)
- Somerset's Community Catalysts Releasing Somerset's capacity to care: community micro-providers in Somerset. The impact and outcomes of the Community Catalysts project - Prevention Library - SCIE
- Stockport's Mental Health Prevention & Personalisation Service Mental Health Prevention & Personalisation Service - Prevention Library - SCIE

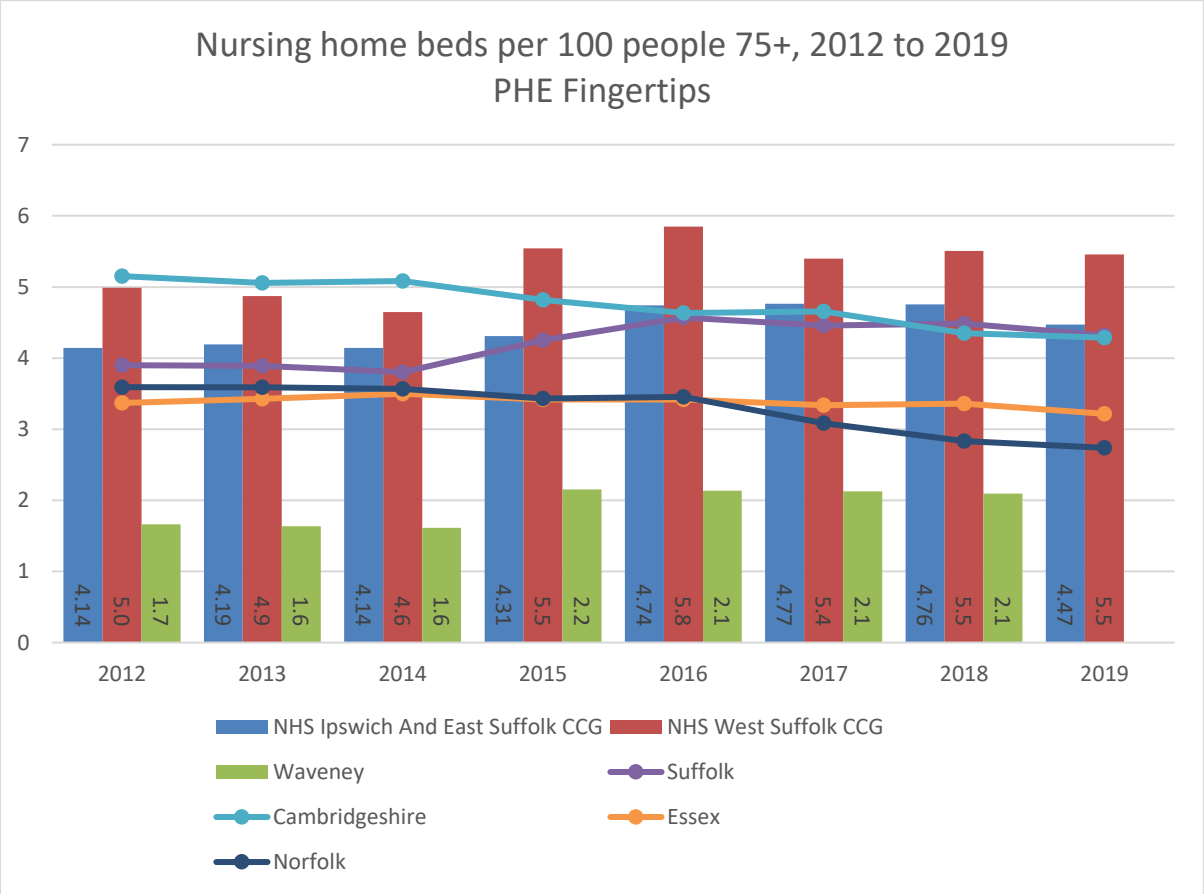
Appendix B - Identifying Gaps in the Market: Care Beds Data

Nursing Home Beds

- The number of nursing home beds per 100 people aged 75 and above in Suffolk is currently higher than or similar to the equivalent figures for neighbouring Local Authorities. The Suffolk figure is around 1.5 beds more per 100 people aged 75+ than in Norfolk, 1 bed more than in Essex and similar to the Cambridgeshire level.

- This is driven by the number of beds per 100 people in West Suffolk and Ipswich and East Suffolk CCGs.

- The Waveney figure has been consistently below the level seen elsewhere in Suffolk and in neighbouring counties.



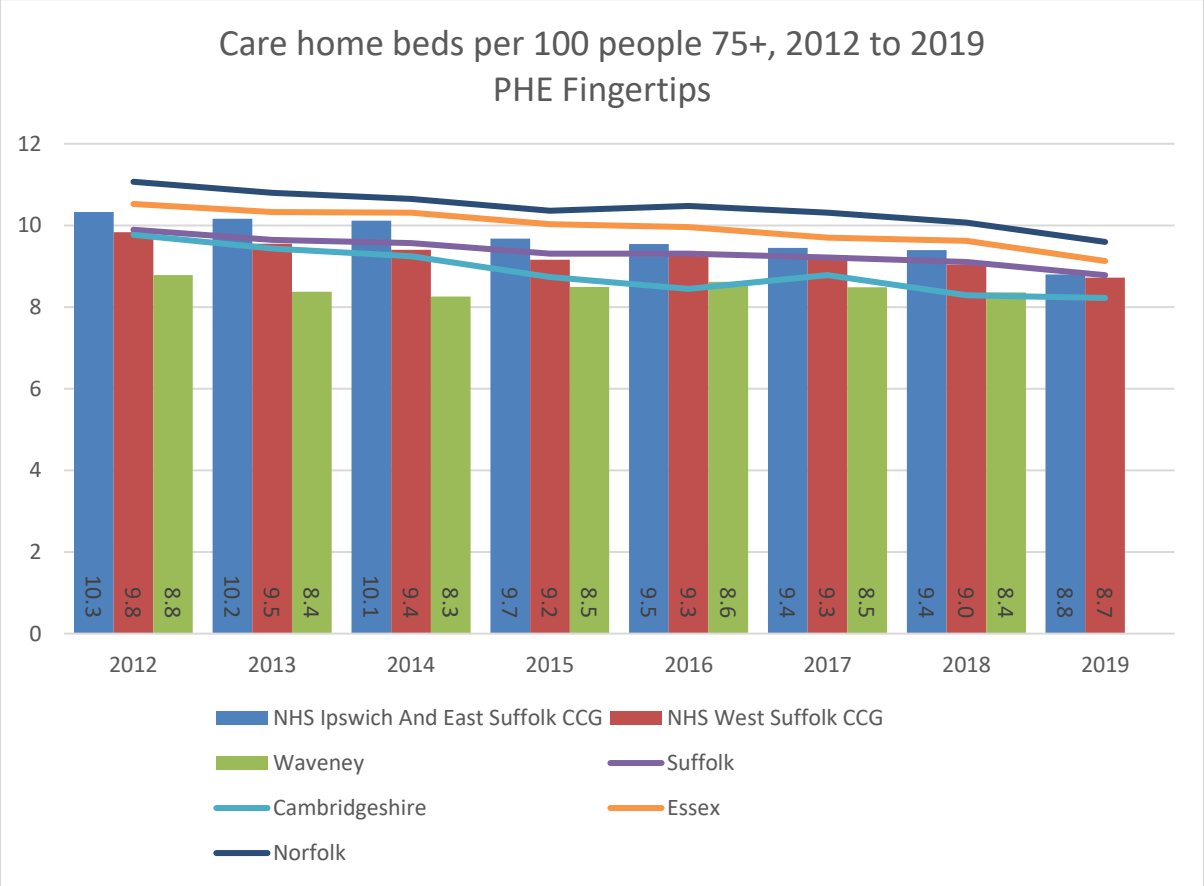
Note: no data available for Waveney beyond 2018 due to the creation of East Suffolk Council

Care Home Beds

- The number of care home beds per 100 people aged 75 and above in Suffolk (8.8 per 100 people) is currently slightly below the level in Norfolk (9.6) and Essex (9.1) but above that in Cambridgeshire (8.2).

- Broken down by Suffolk CCG area, Ipswich and East Suffolk CCG has the highest ratio of care home beds to people aged 75+ (8.8 in 2019), followed by West Suffolk CCG (8.7).

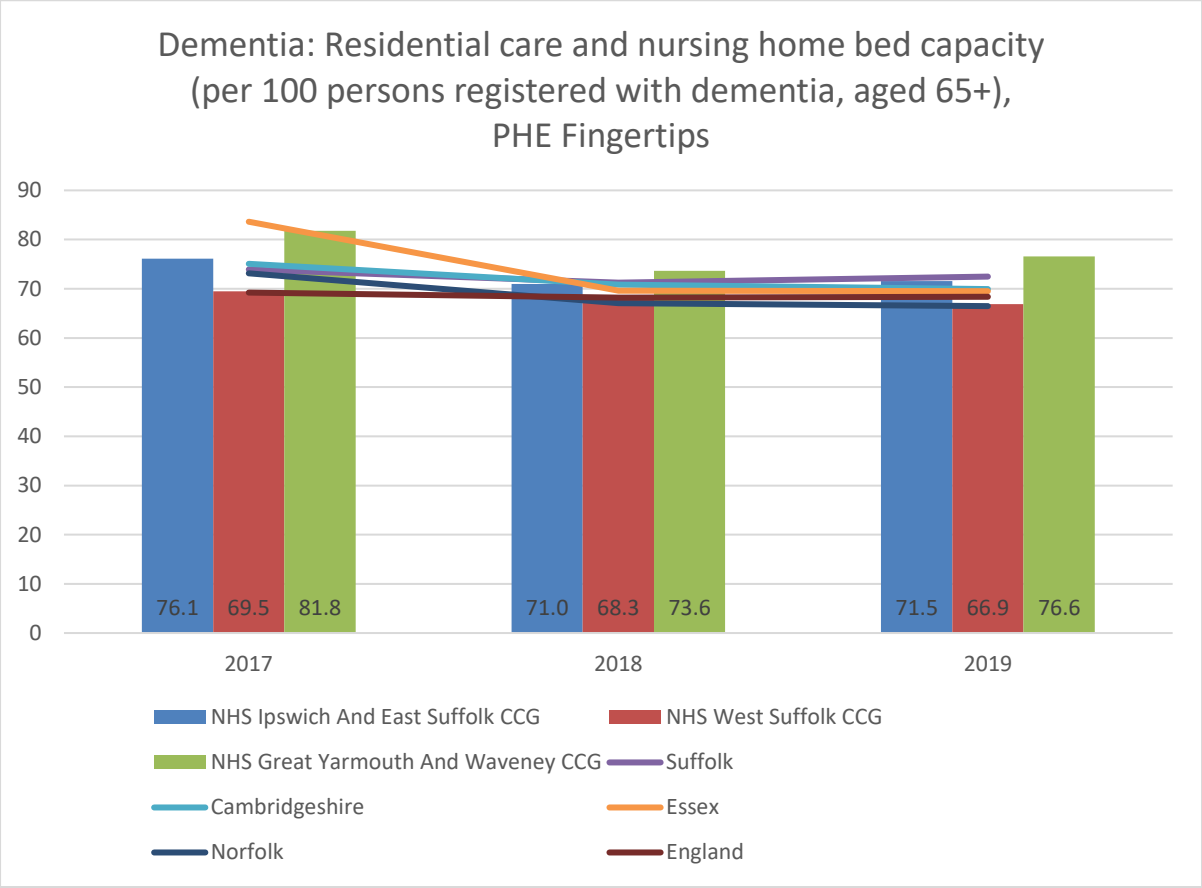
- There is no data for Waveney for the most recent year due to the formation of East Suffolk Council from April 2019, but the number of care home beds per 100 people aged 75+ in Waveney has been consistently slightly below that seen elsewhere in the county. In 2018 the Waveney figure was 8.4 beds per 100 people aged 75+.



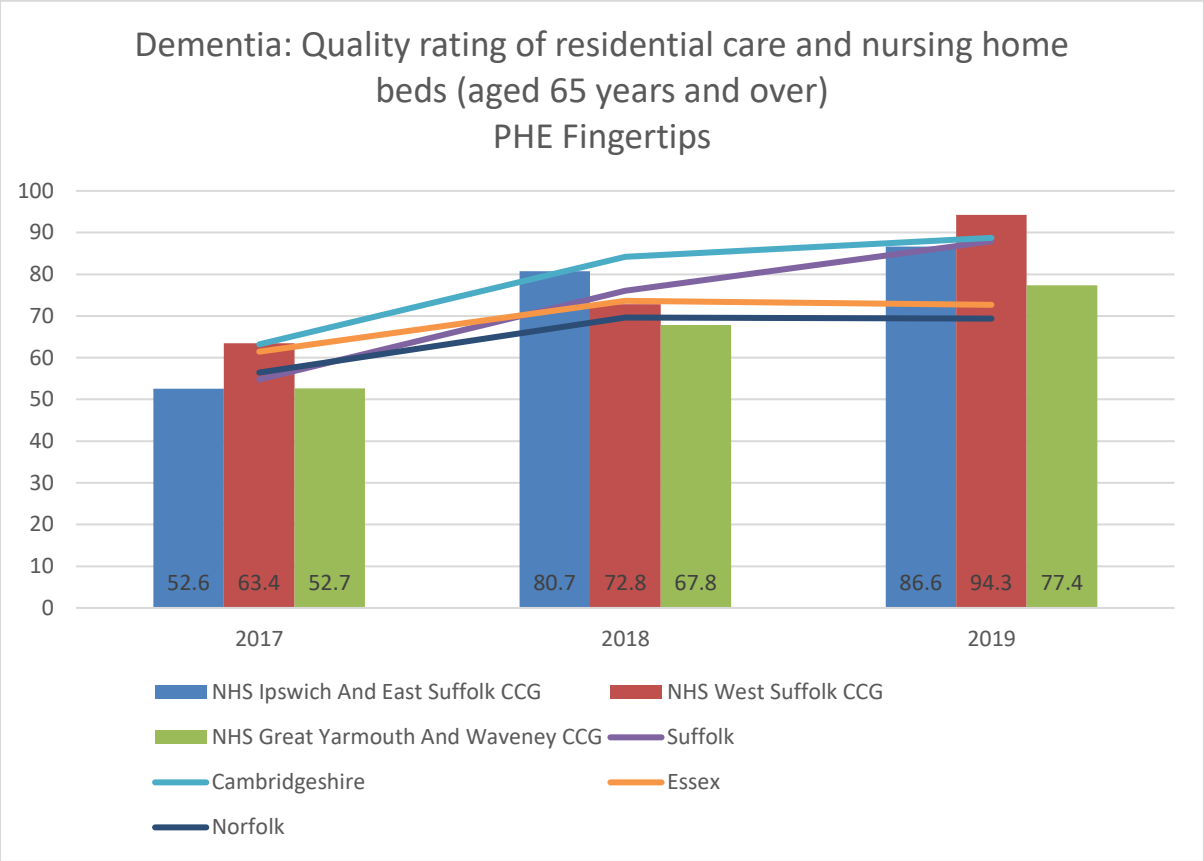
Note: no data available for Waveney beyond 2018 due to the creation of East Suffolk Council

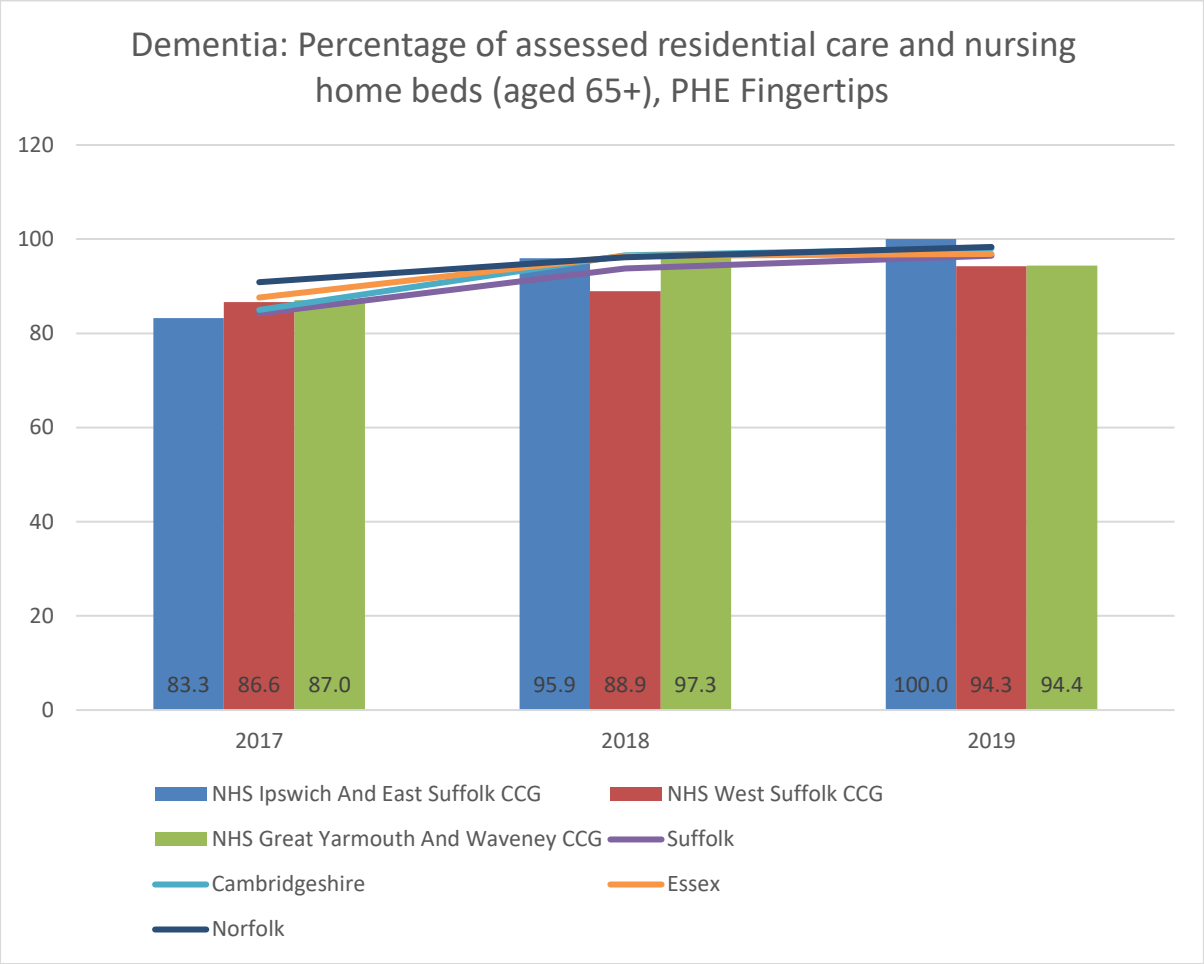
Registered Dementia Care Beds

- Suffolk has a higher number of residential care and nursing home beds per 100 people and 65 and above and registered with dementia than any of its neighbouring counties. The Suffolk figure in 2019 was 72.5 beds per 100 people of this cohort, compared to 69.9 in Cambridgeshire, 69.5 in Essex and 66.5 in Norfolk. The England average is 68.3.
- Among the CCGs with a footprint in Suffolk, Great Yarmouth and Waveney CCG has the highest number of residential care and nursing home beds per 100 people aged 65+ with dementia (76.6), followed by Ipswich and East Suffolk CCG (71.5) and West Suffolk CCG (66.9).



- Suffolk has made considerable progress in improving the quality rating of residential care and nursing home beds during the three years of data from 2017 to 2019. Neighbouring counties have also seen improvements in the quality ratings during this period, albeit with a less pronounced and sustained improvement, particularly in Essex and Norfolk where the quality rating levelled off from 2018 to 2019.
- Improvements have been seen across all three CCG areas with a footprint in Suffolk in both 2018 and 2019. The rate of improvements from one year to the next have varied between CCGs and between years.




Dementia: Percentage of assessed residential care and nursing home beds (aged 65+), PHE Fingertips
120
100
80
60
40
20
0
83.3
86.6
87.0
95.9
88.9
97.3
100.0
94.3
94.4
2017
2018
2019
NHS Ipswich And East Suffolk CCG
NHS West Suffolk CCG
NHS Great Yarmouth And Waveney CCG
Suffolk
Cambridgeshire
Essex
Norfolk

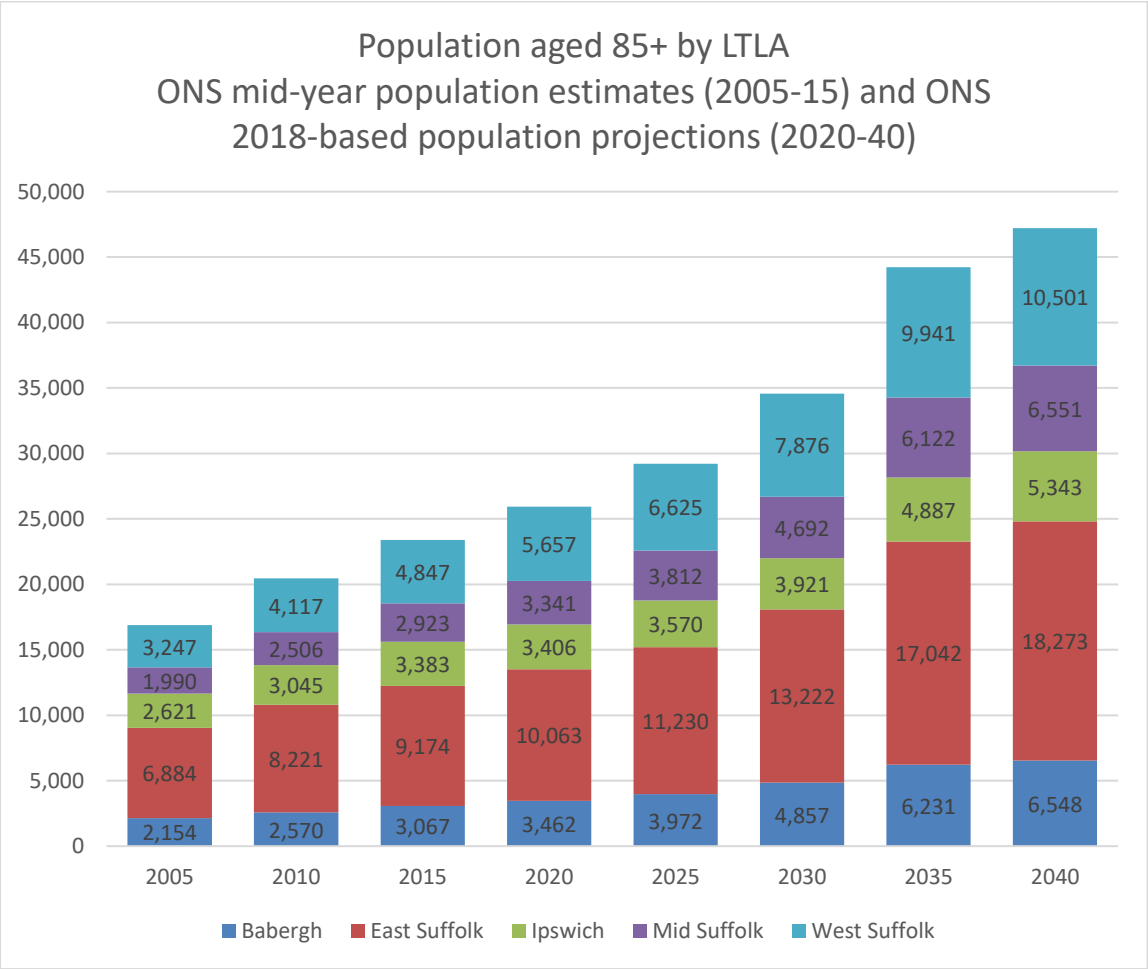
Appendix C - Identifying Gaps in the Market: Aging Population Data

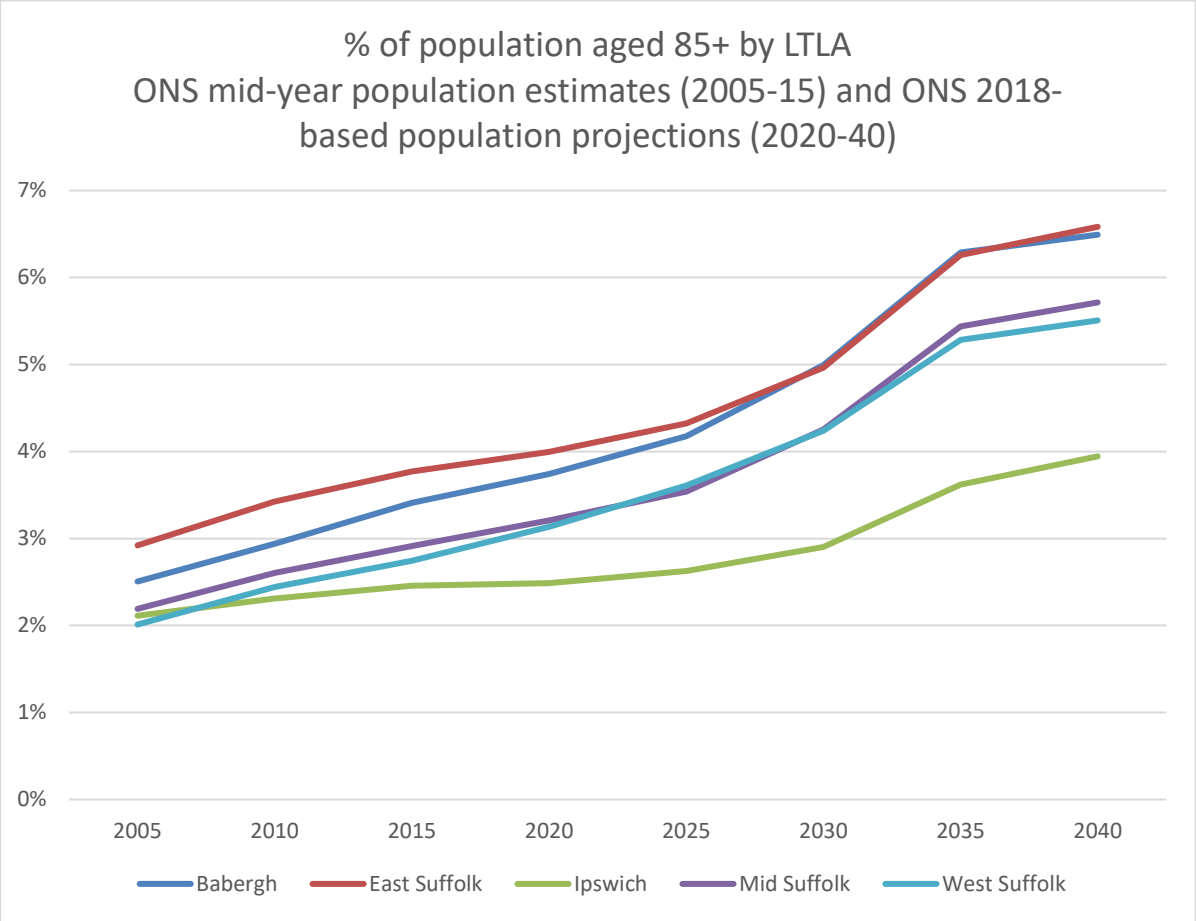
Ageing population

There are currently 25,292 people aged 85 and above in Suffolk (ONS 2019 mid-year population estimates). This number is projected to reach 47,216 by 2040, an increase of 87%.

People aged 85+ currently account for 3.1% of the Suffolk population. This figure has increased from 2.4% in 2005 and is projected to continue increasing over the next 20 years, reaching 4.3% in 2030 and 5.8% in 2040.

Around 40% of Suffolk's 85+ population lives in East Suffolk. This proportion is projected to remain largely similar, but the number of people involved is likely to increase dramatically.





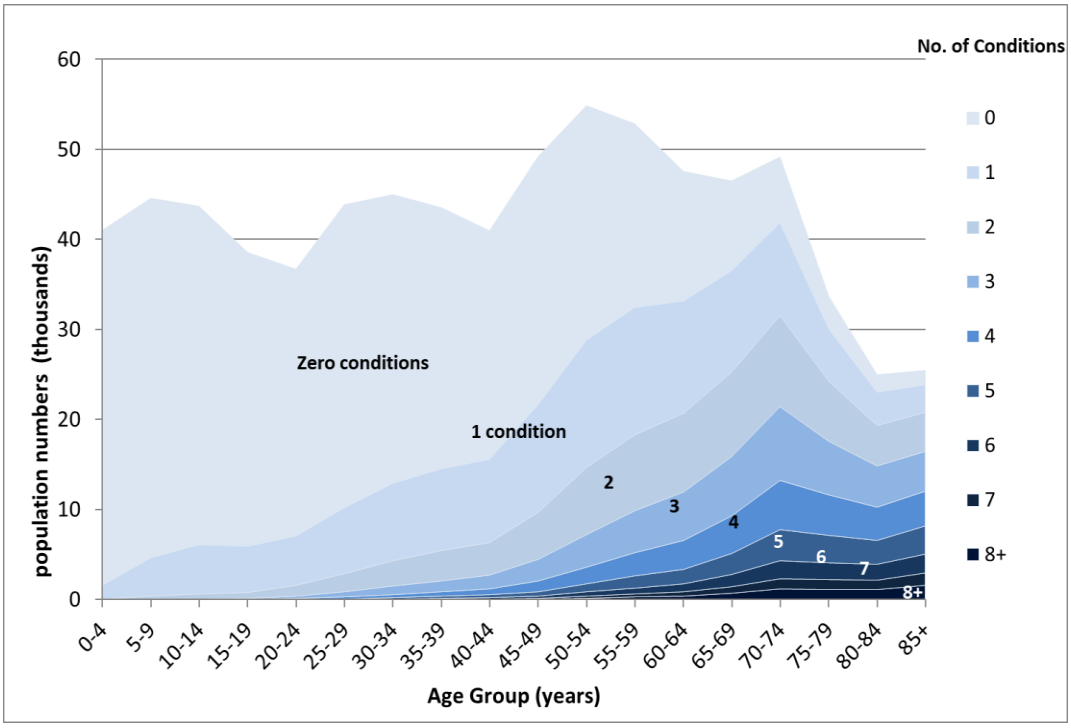
Number of conditions and age

The charts below show projected numbers of people by number of conditions and age.

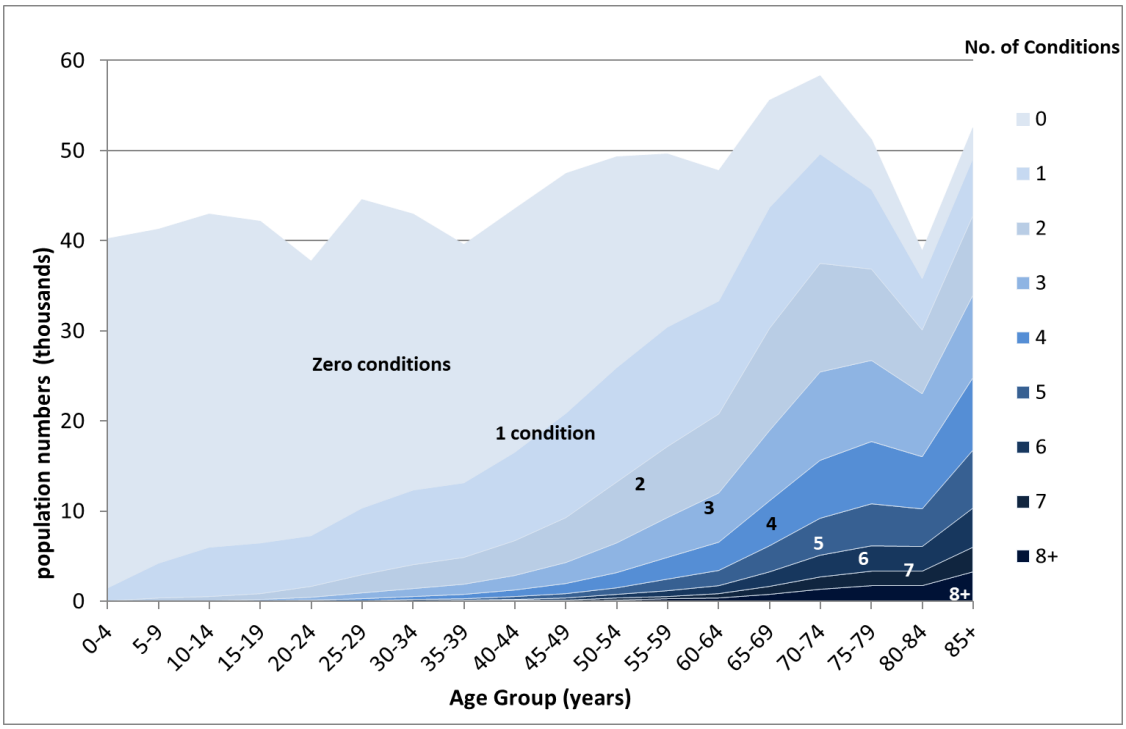
As we age, conditions such as heart disease become more common; and some new age-related conditions appear. Many more people will have multiple conditions in Suffolk in 20 years' time – and multi-morbidity is a key driver of cost.

Applying these proportions to Suffolk's current and future predicted populations suggests that Suffolk will have **a much higher number** of people with 2 or more co-morbidities in 2039 compared to 2019. This poses a large challenge to health and care services.

2019



2039



Source: Barnett et al, 'Epidemiology of multimorbidity and implications for health care, research, and medical education: a cross-sectional study' (Lancet, Vol 380 July 7, 2012); Public Health Suffolk analysis

There is a large 'peak' in the 2039 forecast chart at the age of 85 and over. This is because people are generally forecast to be living longer in 2039, but the way the data has been structured doesn't account for this. I.e. the age brackets haven't been extended to 'collect' the additional older people (for example in 85-89 and 90-94 age groups).

These estimates may also be optimistic, as they project forward based on the health of the current population. We know that only 40% of todays' 70 and 80 year olds were overweight or obese when they were middle aged (in their 40s and 50s).

Currently, 61.5% of adults (aged 18 or over) are overweight or obese. There is an ever-increasing evidence base that links being overweight with ill health, so it is possible that the 70 year olds of the future may be less healthy than 70 year olds of today. However, we also know that rates of smoking are declining, although smoking remains the largest risk factor for premature death. The decline in smoking may contribute to a reduction of chronic conditions in the future, notable lung disease, cardiac disease and many cancers.

Appendix D - Identifying Gaps in the Market: Dementia & Other Mental Health Conditions Population Data

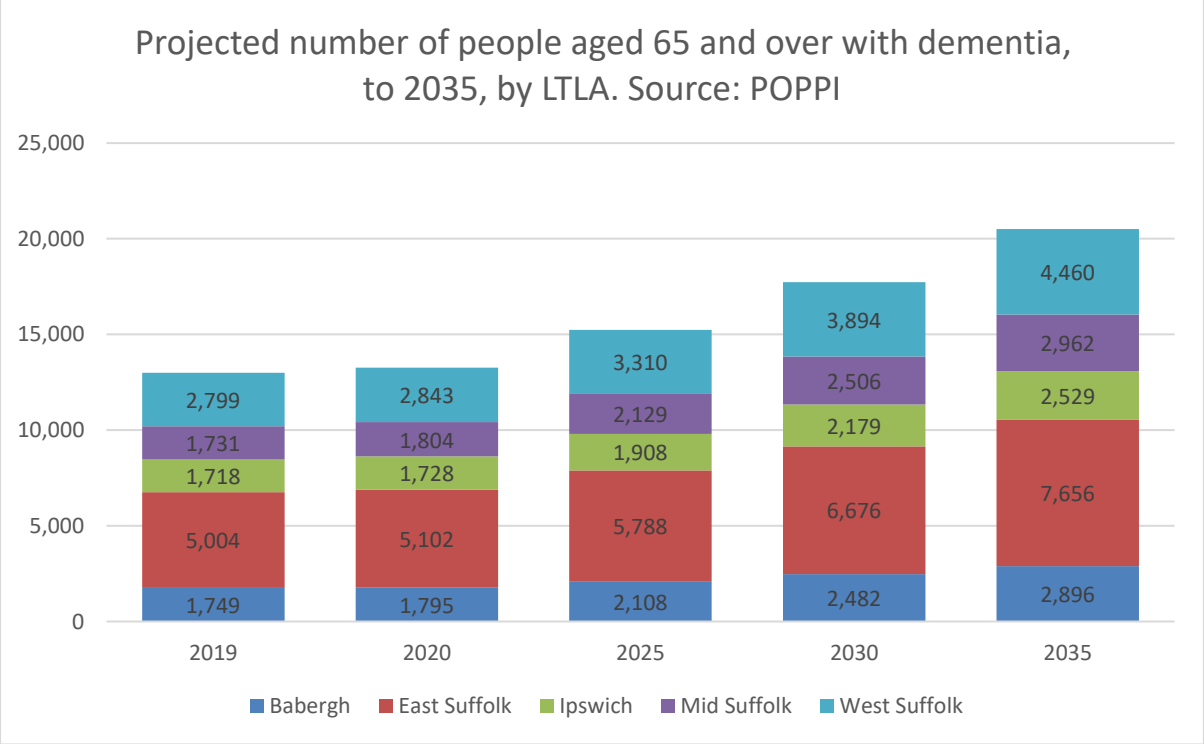
Dementia

There are currently estimated to be around 13,000 people aged 65 and above with dementia in Suffolk, using the rates in the table below:

Age range	% males	% females
65-69	1.5	1.8
70-74	3.1	3
75-79	5.3	6.6
80-85	10.3	11.7
85-89	15.1	20.2
90-94	22.6	33
95+	28.8	44.2

Source: Dementia UK: Update (2014) prepared by King's College London and the London School of Economics for the Alzheimer's Society

Applying these percentages to ONS population projections gives totals of around 15,200 people aged 65 and above with dementia in Suffolk in 2025, 17,700 in 2030 and 20,500 in 2035.



Depression

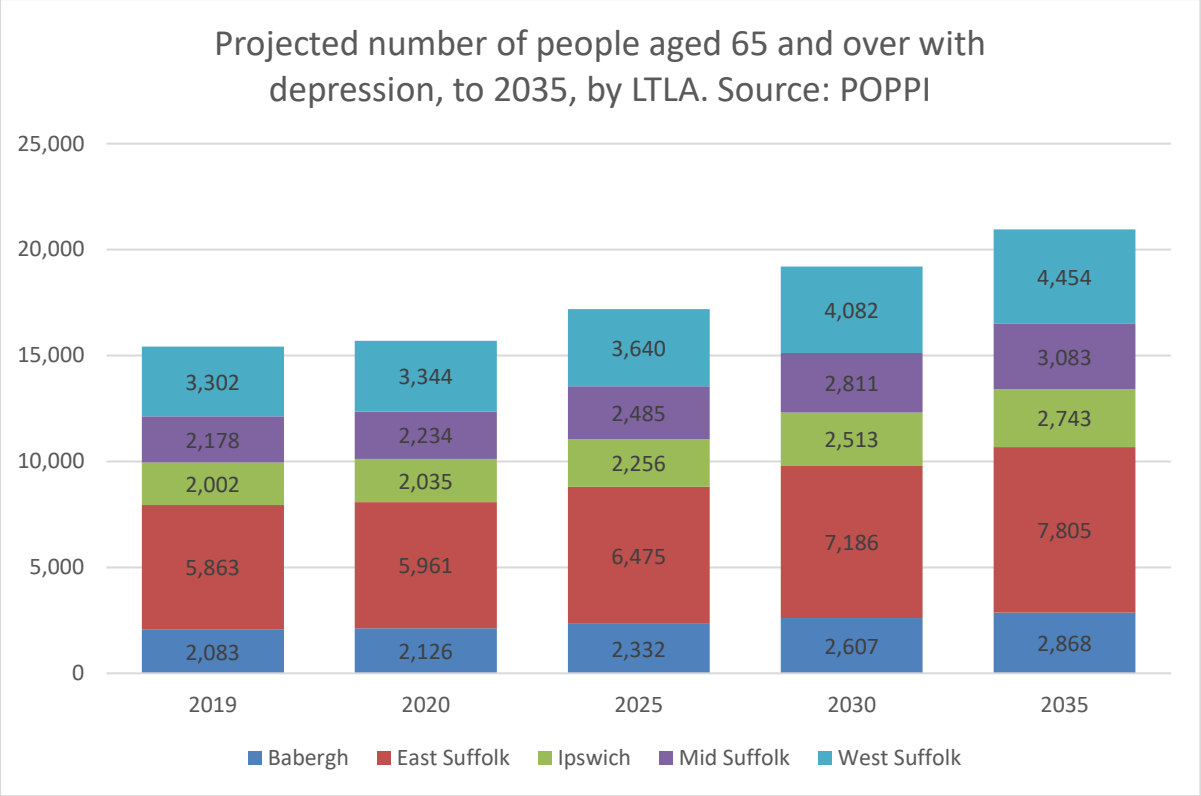
There are currently estimated to be around 15,700 people aged 65 and above suffering from depression in Suffolk, using the rates in the table below:

Age range	% males	% females

65-69	5.8	10.9
70-74	6.9	9.5
75-79	5.9	10.7
80-84	9.7	9.2
85+	5.1	11.1

Source: McDougall et al, Prevalence of depression in older people in England and Wales: the MRC CFA Study in Psychological Medicine, 2007, 37, 1787-1795

Applying these percentages to ONS population projections gives totals of around 17,200 people aged 65 and above with dementia in Suffolk in 2025, 19,200 in 2030 and 21,000 in 2035 – an increase of around 33% since 2020.



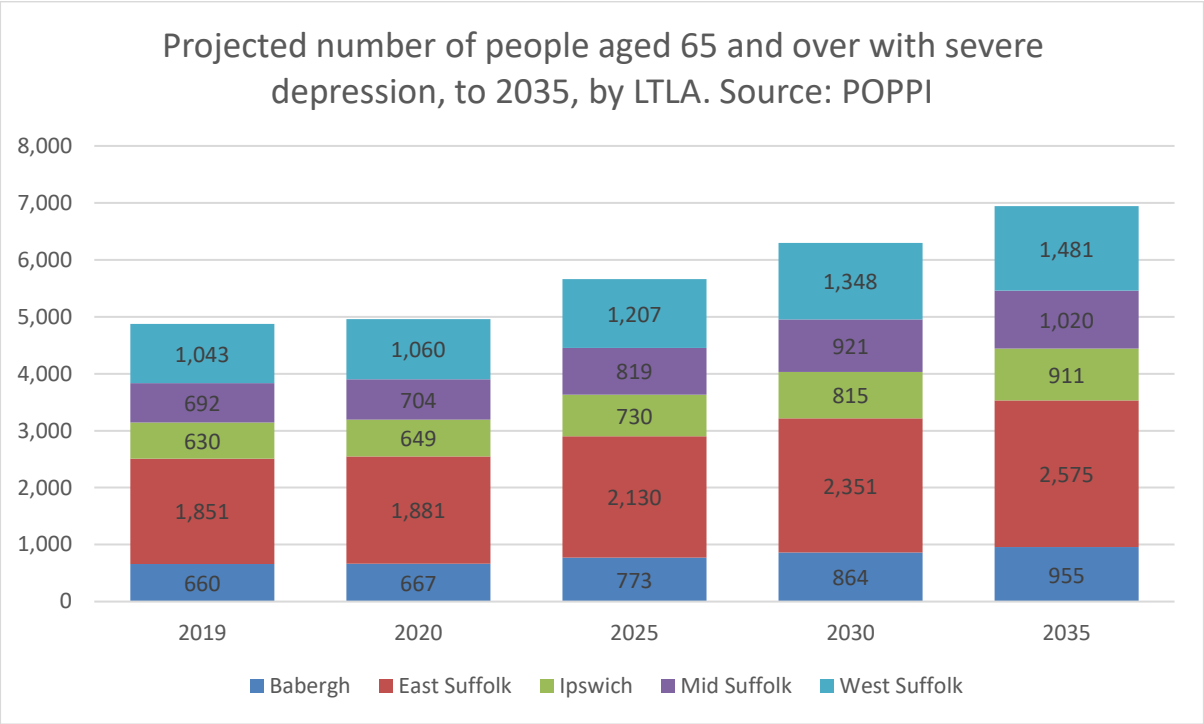
Severe Depression

There are currently estimated to be around 4,900 people aged 65 and above suffering from severe depression in Suffolk, using the rates in the table below:

Age range	% people
65-69	2.5
70-74	1.6
75-79	3.5
80-84	3
85+	3.9

Source: McDougall et al, Prevalence of depression in older people in England and Wales: the MRC CFA Study in Psychological Medicine, 2007, 37, 1787-1795

Applying these percentages to ONS population projections gives totals of around 5,700 people aged 65 and above with severe depression in Suffolk in 2025, 6,300 in 2030 and 6,900 in 2035 – an increase of around 40% since 2020.



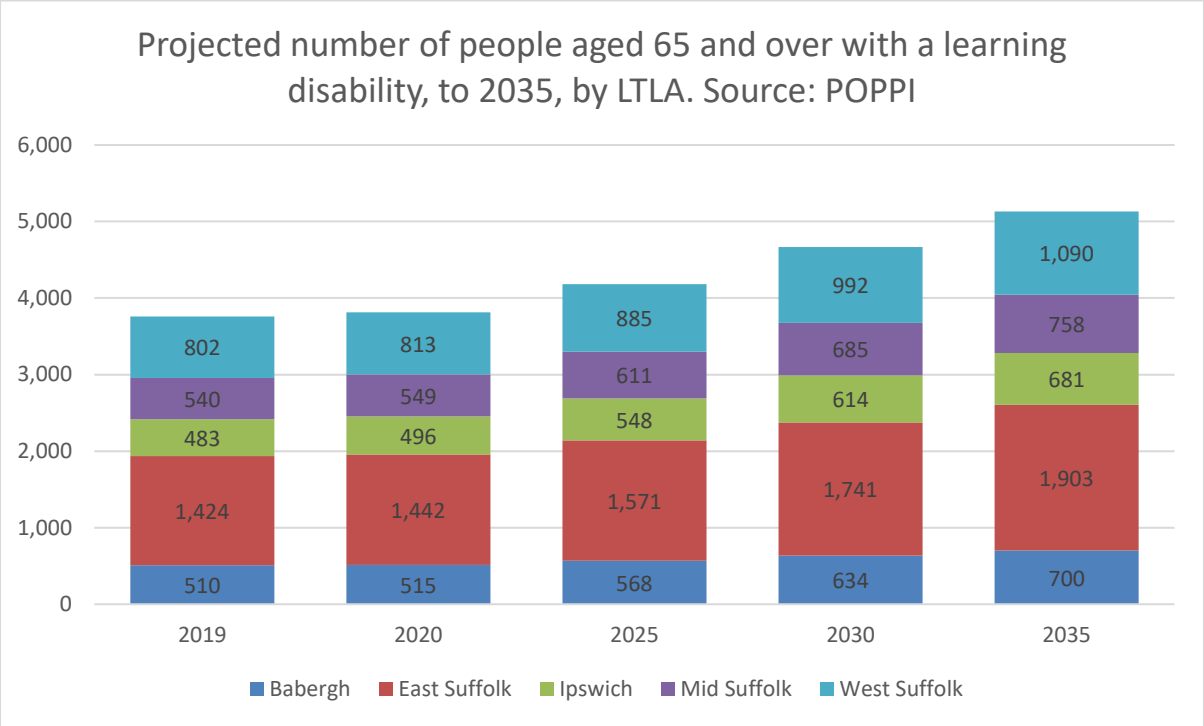
Learning Disability

There are currently estimated to be around 3,800 people aged 65 and above with a learning disability in Suffolk, using the rates in the table below:

Age range	% in 2011	% in 2021
65-69	2.01	2.02
70-74	2.34	2.33
75-79	2.07	2.08
80+	1.89	1.93

Source: Eric Emerson and Chris Hatton of the Institute for Health Research, Lancaster University, entitled Estimating Future Need/Demand for Supports for Adults with Learning Disabilities in England, June 2004.

Applying these percentages to ONS population projections gives totals of around 4,200 people aged 65 and above with a learning disability in Suffolk in 2025, 4,700 in 2030 and 5,100 in 2035 – an increase of around 35% since 2020.


Projected number of people aged 65 and over with a learning disability, to 2035, by LTLA. Source: POPPI
6,000
5,000
4,000
3,000
2,000
1,000
0
2019
2020
2025
2030
2035
802
540
483
1,424
510
813
549
496
1,442
515
885
611
548
1,571
568
992
685
614
1,741
634
1,090
758
681
1,903
700
Babergh
East Suffolk
Ipswich
Mid Suffolk
West Suffolk

Appendix E - Identifying Gaps in the Market: Extra Care Housing Data

1. ***Source: Housing LIN Strategic Housing for Older People Analysis Tool SHOP@ tool***

The Housing LIN More Choice, Greater Voice toolkit indicates a need at the lowest demand rate of 12 extra care units per 1,000 people aged 75+. A more aspirational level would see a need for 25 units per 1,000 people aged 75+

In Suffolk there were 83,794 people aged 75+ in 2019 (Suffolk Observatory Population data) indicating a need for between 1005 (for low reliance) and 2095 (for aspirational reliance) Extra Care units at 2019 rates.

Appendix C above highlights changes to demographics that indicate that Suffolk needs to adopt an aspirational approach to the supply of Extra Care Housing. The analysis showed that at the lowest demand rate of 12 units per 1000 people, Suffolk would need at least 200 more units of Extra Care Housing than the current 800.

However, this demand rate is not representative of national trends or of or the changing demographic picture. Taking these into account an aspirational demand trend of 25 units to 1000 over 75s, would indicate a need for an additional 1295 units.

2. State of Suffolk 2019 report: Section Where we live - 5.2 estimates of specialist accommodation for older people.

Referencing Sheffield Hallam University, "Housing for Older People Supply Recommendations." [46]

"An additional 15,213 specialist homes will be required in Suffolk by 2035, according to HOSPR recommendations.

Units of specialist housing[1] by current 2018 provision, recommended provision for 2035 and the difference; by local authority, Suffolk[46]

Area	2018	2035	Change
Babergh	524	3,049	2,525
Forest Heath	575	1,550	975
Ipswich	1,819	2,996	1,177
Mid Suffolk	893	3,194	2,301
St Edmundsbury	1,003	3,324	2,321

Area	2018	2035	Change
Suffolk Coastal	1,403	4,451	3,048
Waveney	1,059	3,925	2,866
Suffolk	**7,276**	**22,489**	**15,213**

Source: Sheffield Hallam University, Housing for Older People Supply Recommendations

Notes

1. **Specialist housing** includes sheltered housing, enhanced sheltered housing and extra care housing; all of which offer varying levels of on-site supportive management.

Savings from using Extra Care Housing

According to the Housing LIN report, Demonstrating the Health and Social Cost-Benefits of Lifestyle Housing for Older People, people in extra care housing use less care (domiciliary/home care) hours than if they were living in the community. Research found that people living in extra care housing needed less formal care, as measured by the size of their 'care packages', than a control group in the community. They had fewer admissions into a care home and fewer deaths than the control group. After moving into the extra care scheme their care package costs reduced and were 16% lower compared to the cost preadmission. The saving to adult social care in home care cost was £2,400 per person per year. Postponing entry into residential care by one year could reduce non-core costs by £26,000 per person or £15,500 if a move to extra care housing.

HOPSR also states there is significant evidence that living in specialist accommodation benefits older people's health and wellbeing, as well as making savings to the NHS and social care.

Appendix F - Identifying Gaps in the Market: Learning Disability and Autism Data

Transforming Care Programme

The ongoing NHS England, Transforming Care Programme specifies a maximum number of adults with a learning disability and/or autism that a *Transforming Care Partnership* should place in hospital. This maximum decreases in 2021/22. The aim of the programme is to replace hospital beds with improved health and care services so that more people can live in the community, with the right support, and close to home.

The number of people admitted to specialist hospitals in 2019 and 2020 is provided below.

	Suffolk Transforming Care Partnership	
	2019	2020
Admissions	13	2

The number of people expected to be inpatients this year and next is provided below. These numbers are low and therefore there is a need to grow LD&A admission prevention services and community-based care and support services.

No of Inpatients **@ March 21**	**NHS England Transforming Care maximum after March 21**
2 Adults in CCG funded beds	Trajectory removed by NHSE because Suffolk TCP is high performing
14 Adults in Specialist Commissioning beds funded by NHSE	9

The trajectory (or predicted numbers) of 9 represents a snapshot at any point during the year.

Additional Supported Housing

Our working hypothesis is that costs are very high for LD&A groups with complex needs as there is not enough supply and little choice for suitable care. To examine this further there is a key workstream for 'Supported Housing' within the 'ACS Programme for Learning Disability and Autism Service Transformation'. Initial work will involve understanding and agreeing the requirement for additional supported housing provision for people with a learning disability and/or autism and complex needs and will include talking with providers.

Illustration of Current High Costs

The following is taken from ACS LD&A Service data for financial year 2020/21 at Dec 2020.

The average care package cost for an LD&A customer is £836 per week. When this is used as a baseline cost to compare the cost difference for specific groups with complex needs, there is a large discrepancy for 2 key groups as listed below.

LD&A Cohort	Average ACS cost per week	Total Yearly ACS cost	Difference from baseline £	Difference from baseline %
LD&A (baseline)	£836		-	-
Transforming Care Customer	£3,025	£5,348,000	£2,189	262%
Customer with most complex needs transitioning from the Disabled Children's and Young Peoples Team	£2,886	£3,902,000	£2,050	245%

Whilst the average costs are high these relate to a small number of customers, 34 for Transforming Care and 26 for DCYP Customers with the most complex needs.

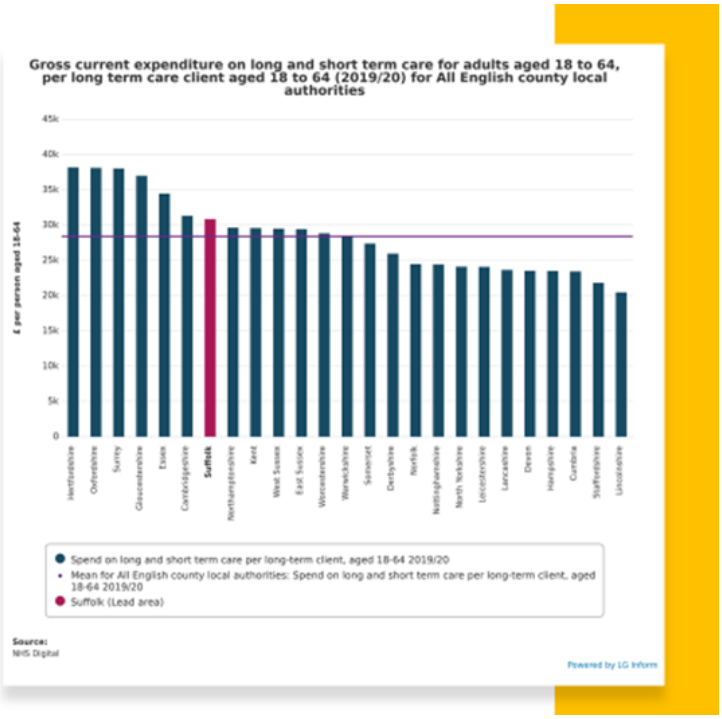
Comparison with other Local Authorities.

The following data is taken from our analysis of the 'Adult Social Care Use of Resources Report for Suffolk 2019/20' (Published Dec 2020)

WAA Spend per Client

- Suffolk spends £30,889 per long term client and is 27/151.
- CIPFA NN average is £26,523 (14.1% lower)
- England average £26,505 (14.2% lower)
- Best in Class £19,585 (36.6% lower)

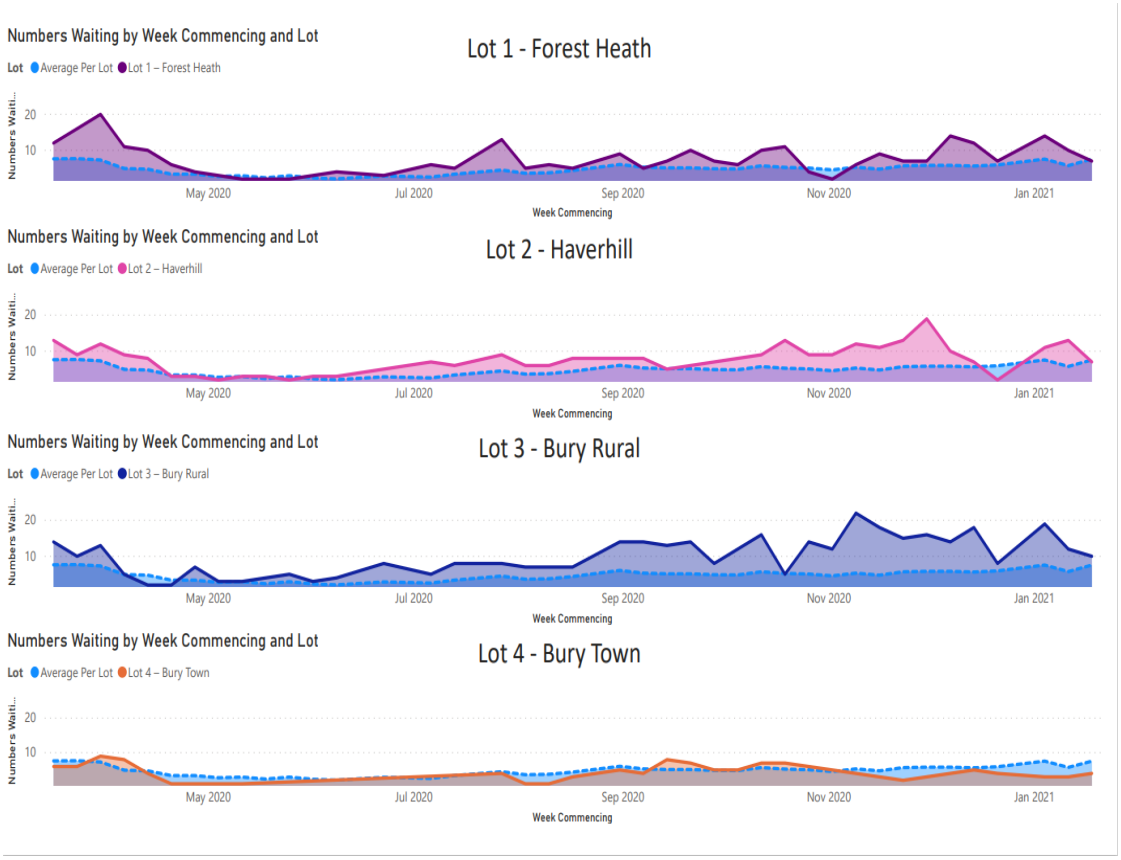
The 2019/20 ranking is worse than 2018/19 of 30/151

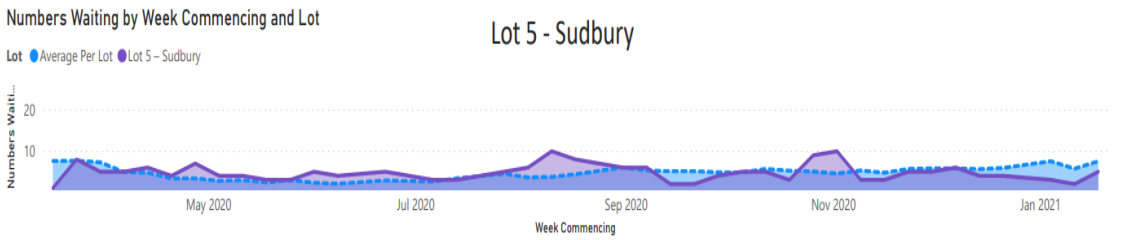


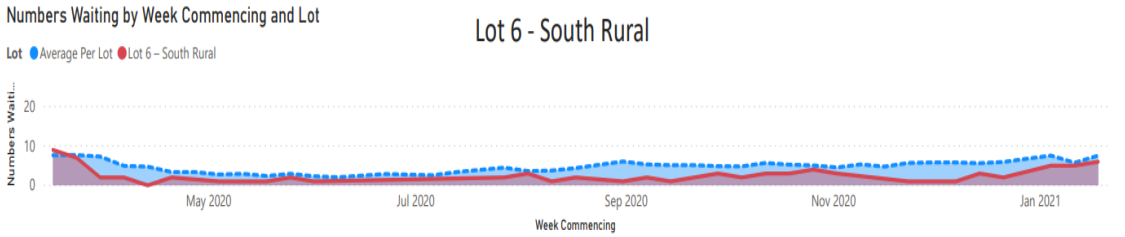
WAA = Working Aged Adults

Appendix G - Identifying Gaps in the Market: Home Care Data

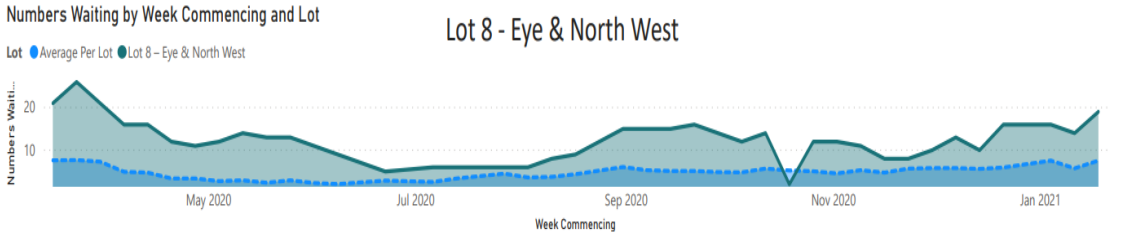
- The cost of home care varies from parish to parish across the county to reflect the difficulties in attracting suppliers to some areas. The difference between the highest and lowest prices is £6.34 per hour equivalent to 26%. Approximately a fifth of parishes are in the highest price level.
- Waiting list data – The charts in the following pages show both the average numbers of people waiting and the length of time waiting by geographical area (solid line) and compared to the countywide average (dotted line).
- The combination of a need to pay differential rates for different areas and the ongoing waiting lists in different parts of the County is indicative of pressure points arising from gaps in the home care market across the County.

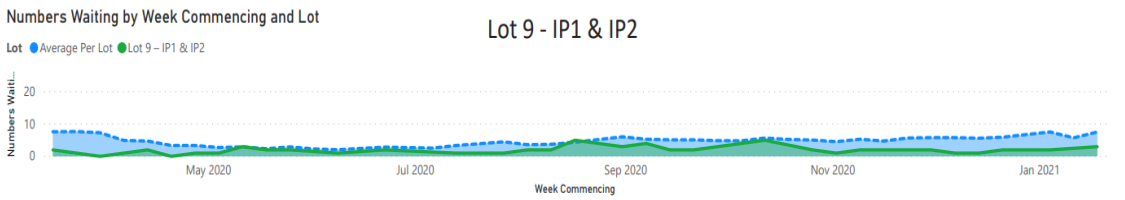


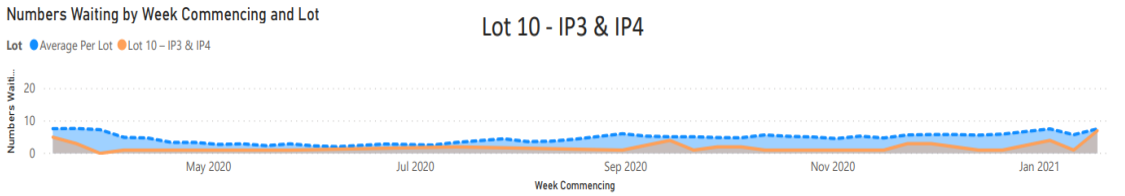

Numbers Waiting by Week Commencing and Lot
Lot 5 - Sudbury
Lot Average Per Lot Lot 5 – Sudbury
Numbers Waiti...
20
10
May 2020
Jul 2020
Sep 2020
Nov 2020
Jan 2021
Week Commencing

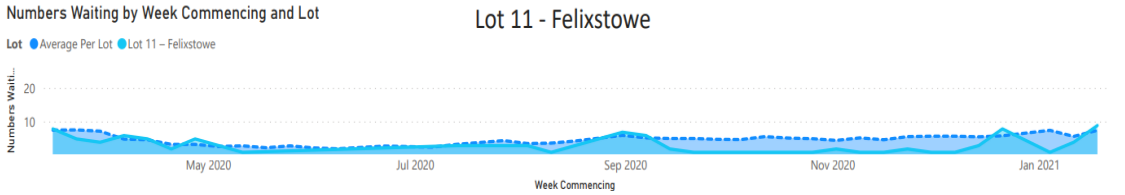

Numbers Waiting by Week Commencing and Lot
Lot 6 - South Rural
Lot Average Per Lot Lot 6 – South Rural
Numbers Waiti...
20
10
0
May 2020
Jul 2020
Sep 2020
Nov 2020
Jan 2021
Week Commencing

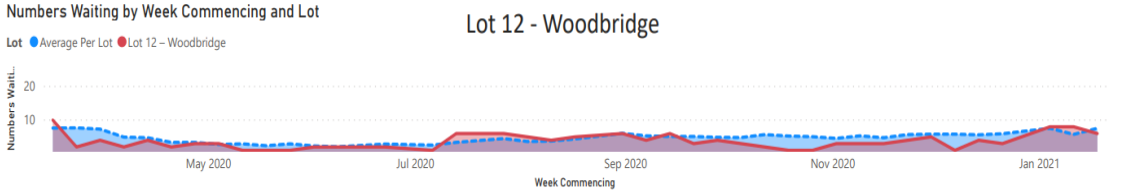
Numbers Waiting by Week Commencing and Lot
Lot 7 - Stowmarket
Lot Average Per Lot Lot 7 – Stowmarket
Numbers Waiti...
20
10
0
May 2020
Jul 2020
Sep 2020
Nov 2020
Jan 2021
Week Commencing


Numbers Waiting by Week Commencing and Lot
Lot 8 - Eye & North West
Lot Average Per Lot Lot 8 – Eye & North West
Numbers Waiti...
20
10
May 2020
Jul 2020
Sep 2020
Nov 2020
Jan 2021
Week Commencing

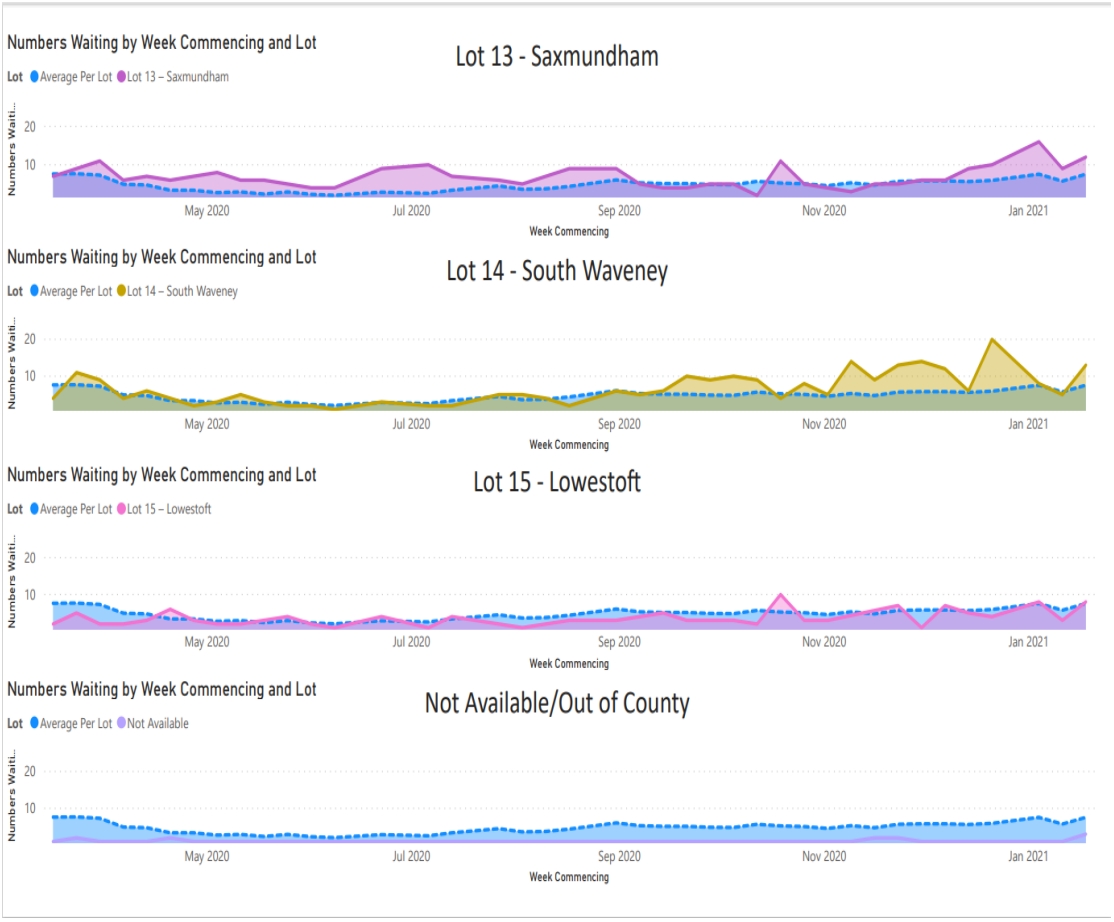

Numbers Waiting by Week Commencing and Lot
Lot 9 - IP1 & IP2
Lot Average Per Lot Lot 9 – IP1 & IP2
Numbers Waiti...
20
10
0
May 2020
Jul 2020
Sep 2020
Nov 2020
Jan 2021
Week Commencing

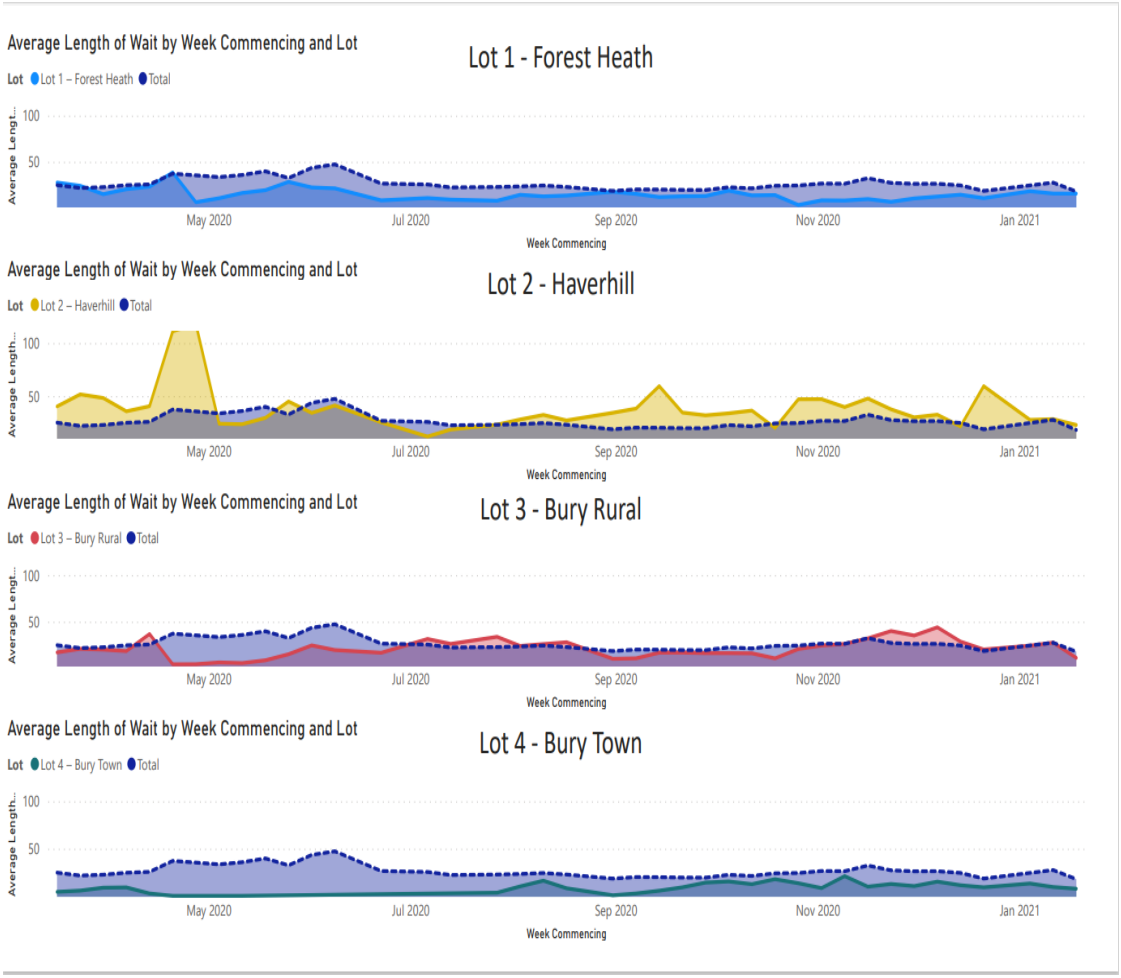

Numbers Waiting by Week Commencing and Lot
Lot 10 - IP3 & IP4
Lot Average Per Lot Lot 10 – IP3 & IP4
Numbers Waiti...
20
10
0
May 2020
Jul 2020
Sep 2020
Nov 2020
Jan 2021
Week Commencing

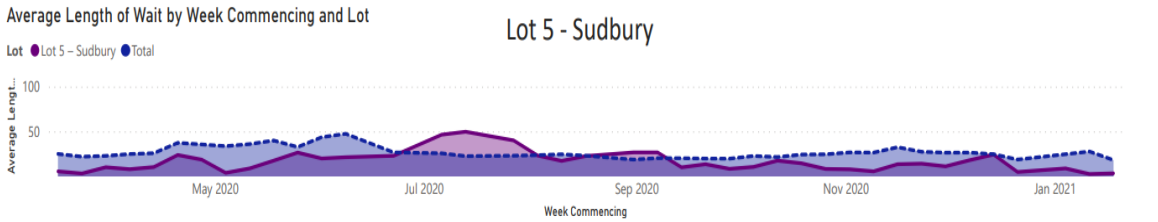

Numbers Waiting by Week Commencing and Lot
Lot 11 - Felixstowe
Lot Average Per Lot Lot 11 – Felixstowe
Numbers Waiti...
20
10
May 2020
Jul 2020
Sep 2020
Nov 2020
Jan 2021
Week Commencing

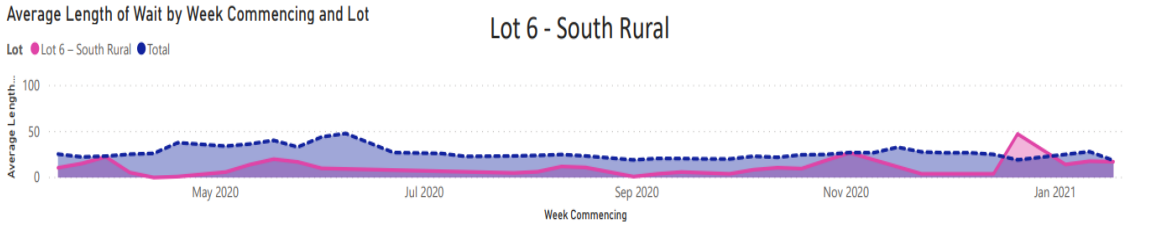

Numbers Waiting by Week Commencing and Lot
Lot 12 - Woodbridge
Lot Average Per Lot Lot 12 – Woodbridge
Numbers Waiti...
20
10
May 2020
Jul 2020
Sep 2020
Nov 2020
Jan 2021
Week Commencing

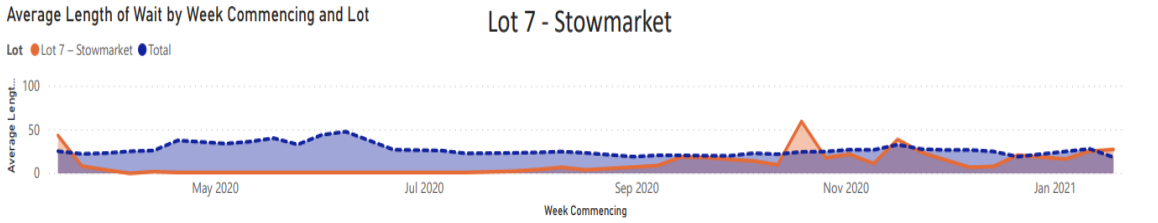
Care and Support Market Sustainability Strategy – Technical Annex

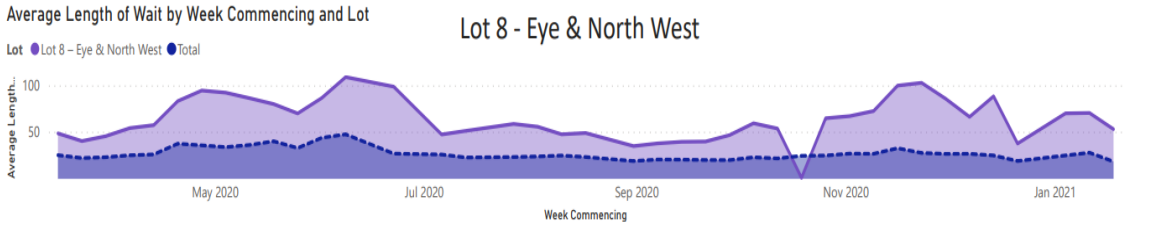


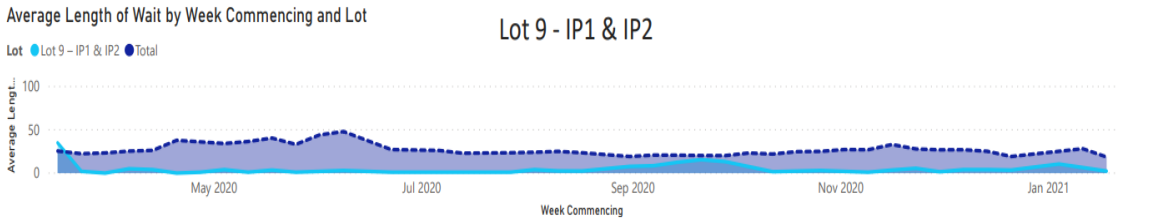


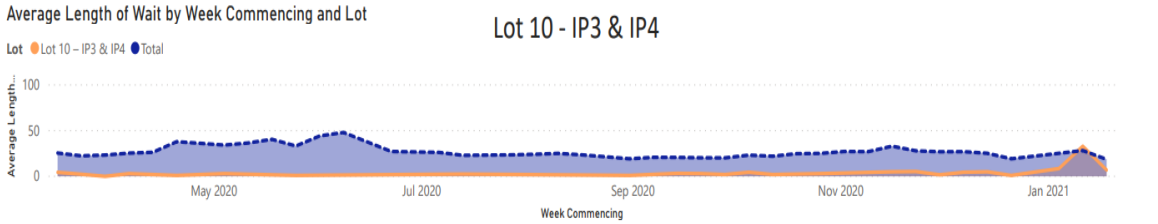

Average Length of Wait by Week Commencing and Lot
Lot 5 - Sudbury
Lot Lot 5 – Sudbury Total
Average Lengt...
100
50
May 2020
Jul 2020
Sep 2020
Nov 2020
Jan 2021
Week Commencing

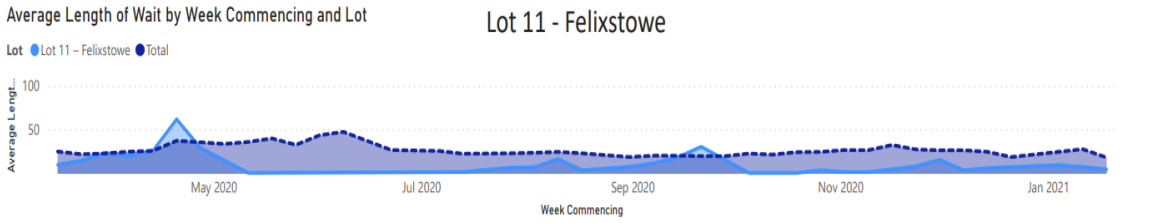

Average Length of Wait by Week Commencing and Lot
Lot 6 - South Rural
Lot Lot 6 – South Rural Total
Average Length...
100
50
0
May 2020
Jul 2020
Sep 2020
Nov 2020
Jan 2021
Week Commencing

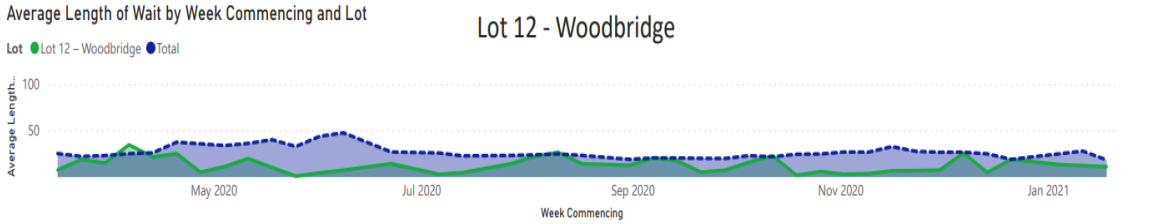

Average Length of Wait by Week Commencing and Lot
Lot 7 - Stowmarket
Lot Lot 7 – Stowmarket Total
Average Lengt...
100
50
0
May 2020
Jul 2020
Sep 2020
Nov 2020
Jan 2021
Week Commencing

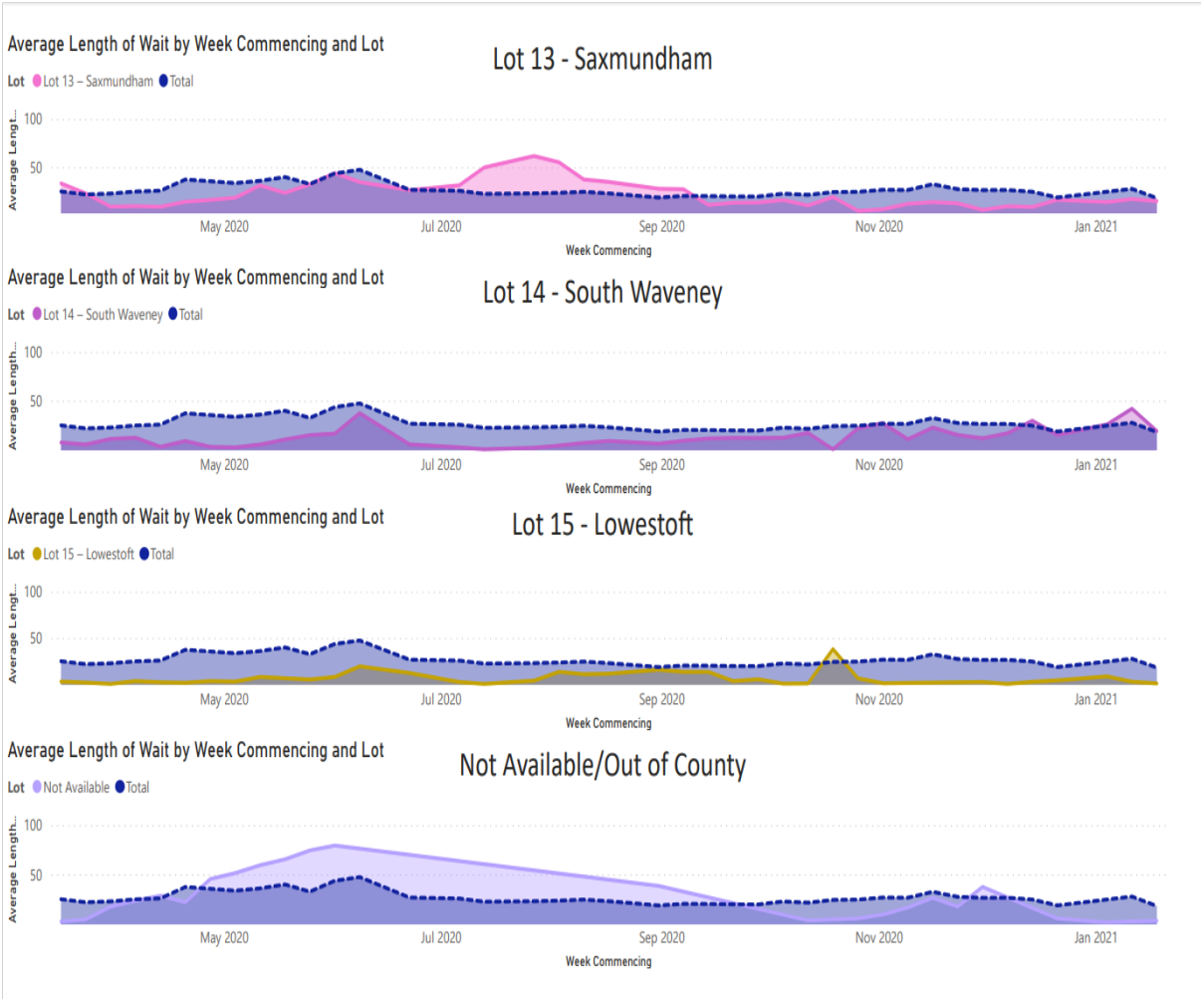

Average Length of Wait by Week Commencing and Lot
Lot 8 - Eye & North West
Lot Lot 8 – Eye & North West Total
Average Length...
100
50
May 2020
Jul 2020
Sep 2020
Nov 2020
Jan 2021
Week Commencing


Average Length of Wait by Week Commencing and Lot
Lot 9 - IP1 & IP2
Lot Lot 9 – IP1 & IP2 Total
Average Lengt...
100
50
0
May 2020
Jul 2020
Sep 2020
Nov 2020
Jan 2021
Week Commencing

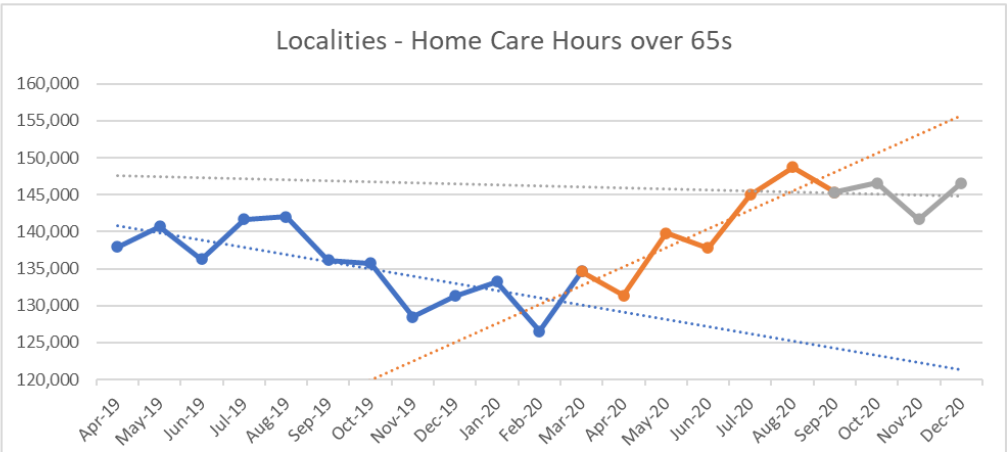

Average Length of Wait by Week Commencing and Lot
Lot 10 - IP3 & IP4
Lot Lot 10 – IP3 & IP4 Total
Average Length...
100
50
0
May 2020
Jul 2020
Sep 2020
Nov 2020
Jan 2021
Week Commencing


Average Length of Wait by Week Commencing and Lot
Lot 11 - Felixstowe
Lot Lot 11 – Felixstowe Total
Average Lengt...
100
50
May 2020
Jul 2020
Sep 2020
Nov 2020
Jan 2021
Week Commencing


Average Length of Wait by Week Commencing and Lot
Lot 12 - Woodbridge
Lot Lot 12 – Woodbridge Total
Average Length...
100
50
May 2020
Jul 2020
Sep 2020
Nov 2020
Jan 2021
Week Commencing



- Data from the ACS Transformation Programme, Managing Demand in Adults Social Care, has recorded changing demand trends for homecare for people 65 and over. The chart below using data from our Social Care case management system indicates that whilst homecare demand had been decreasing steadily in 2019/20 since April 2020 it started to



increase and so by December 2020 it was higher than the previous year. We don't yet know if the impact of Covid will mean home care demand will continue to increase.