

# The Care Home Market in Derby



## ADULTS AND HEALTH SCRUTINY BOARD

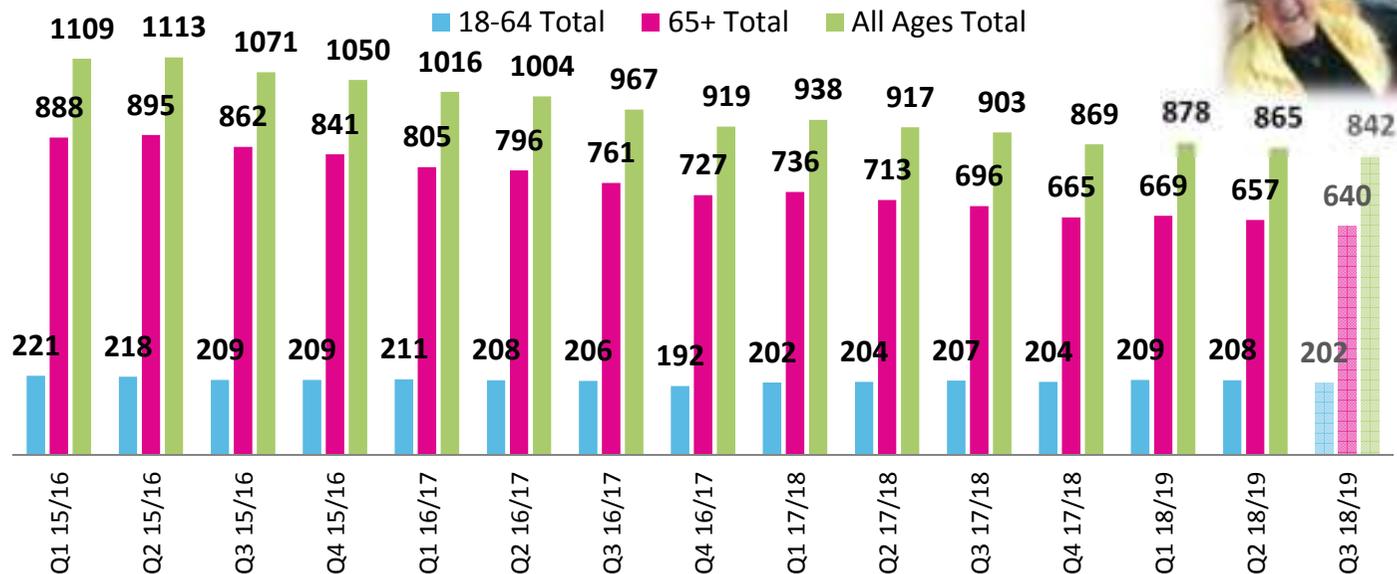
16 April 2019



Derby City Council

# Age breakdown and trends: Care Home based customers

Number of Customers in Care Home Setting and age group, at end of each quarter, over time



## Key Trends

- Steady and significant decline in numbers of customers in care homes over past 3 plus years
- 28 per cent reduction in care home provisions for customers 65 and over since Q1 15/16
- Numbers of Younger Adults (18-64) largely consistent over past 3 years

# Residential and Nursing Customers national and CIPFA benchmarking

Customers by Setting and Age Groups	Quarter	Derby (rate per 100,000)	CIPFA Group Avg (rate per 100,000)	CIPFA Group Rank (Highest - out of 16)	National Average (rate per 100,000)	National Rank (Highest out of 152)
Customers in Nursing 18-64	Q4 17/18	<b>28.91</b>	19.82	1	17.44	17
Customers in Residential 18-64	Q4 17/18	<b>99.57</b>	91.04	6	105.54	77
Customers in Nursing 65+	Q4 17/18	<b>575.64</b>	396.94	1	474.65	54
Customers in Residential 65+	Q4 17/18	<b>995.37</b>	1231.09	12	1010.22	70

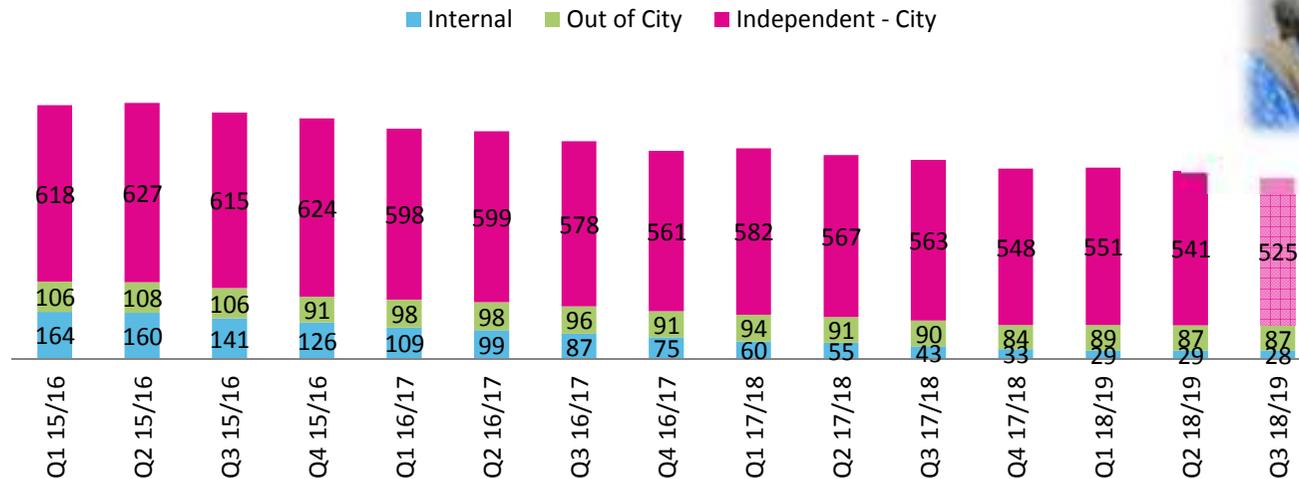


- Derby has a higher uptake of Nursing Placements for customers in both 18-64 and 65 and over age groups, highest amongst our CIPFA comparator group for both age groups.
- There have been minimum decreases nationally for the 18-64 age group in Residential Care Homes since 2014-15. Local Derby rates reflects this trend.
- Derby’s rate for the 65 and over age group in Nursing and Residential homes has decreased by 30 per cent in the past 4 years.
- Nationally and within our benchmarking group, decreases have been around 10-15 per cent.
- Derby has the 16<sup>th</sup> highest rate nationally for the 65 and over age group in Nursing Homes in 2014/15



# Size of the Independent Sector in Derby

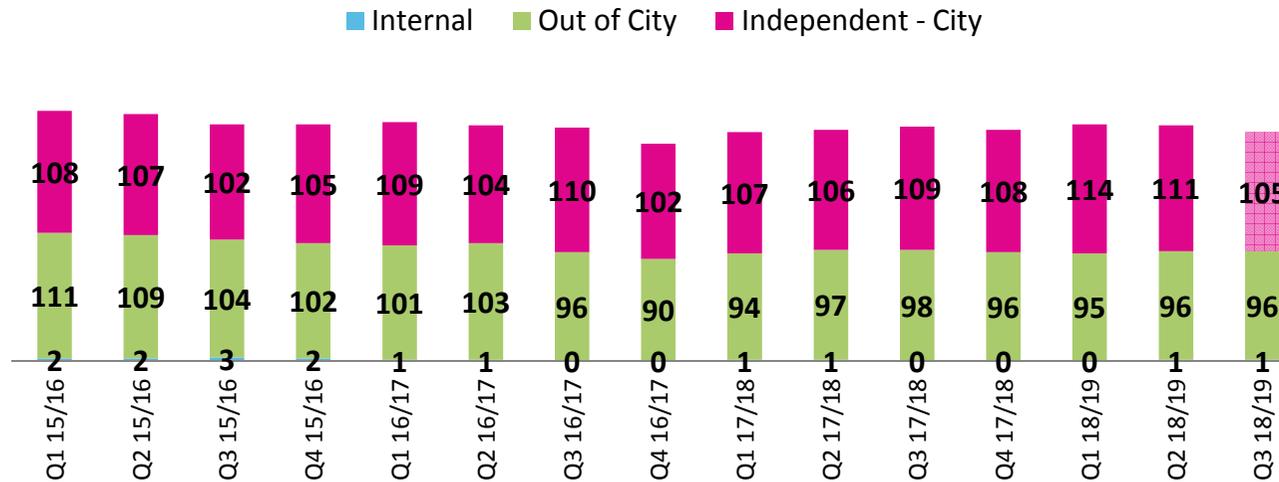
Number of Customers by Sector Type, customers 65+ at end of each quarter, over time



- Independent care homes in Derby have had a decrease in placements by the Derby City Council but not in line with our overall decrease in the sector.
- Aged 65 plus internal customer numbers fell by 83 per cent to just 28 since Q1 15/16
- Out of City numbers for 65 plus customers fell by 18 per cent since Q1 15/16
- Independent sector numbers in Derby fell by 15 per cent but the sector share has grown from 70 to 82 per cent of our total commissioned sector for 65 and over age group customers in Care Homes

# Size of the Independent Sector in Derby

Number of Customers by Sector Type, customers 18-64 at end of each quarter, over time



- Independent sector care homes in Derby have seen a decrease in placements or 18-64 age group customers by Derby City Council generally in line with our overall decrease in the sector.
- Out of City 65 plus customer numbers for have fallen by 13 per cent since Q1 15/16
- The Independent sector in Derby has fallen by 3 per cent in volume but has grown from 49 to 52 per cent of our total commissioned sector for 18-64 age group customers in Care Homes

# Residential Care Home market profile in Derby (as at 28/02/2019)

## Provision Setting

Residential / Nursing	No of Customers	Avg Weekly Cost
Residential	365	£604.24
Nursing	216	£507.87

## Age Group

Age Group	No of Customers	Avg Weekly Cost
18-24	13	£1,774.68
25-34	8	£1,126.75
35-44	8	£1,301.70
45-54	30	£651.02
55-64	39	£588.03
65-74	83	£541.53
75-84	177	£499.17
85-94	165	£502.23
95+	58	£502.01

## Provision Type

Provision Type	No of Customers	Avg Weekly Cost
Standard	409	£503.71
Negotiated	103	£503.07
Specialist	69	£1,049.48

## Gender

Gender	No of Customers	Avg Weekly Cost
Female	385	£535.47
Male	196	£633.11

## Ethnicity

Ethnicity	No of Customers	Avg Weekly Cost
White	527	£570.52
Black	18	£579.70
Asian	16	£448.46
Not Known	15	£506.58
Other	3	£920.79
Dual Heritage	2	£805.84

## Support Reason

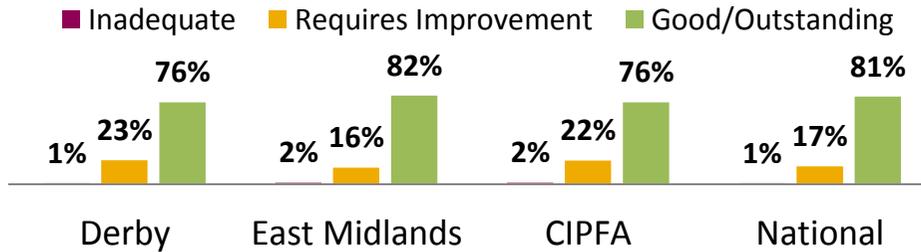
Support Reason	No of Customers	Avg Weekly Cost
Learning Disability	75	£997.10
Memory & Cognition	93	£503.16
Mental Health	120	£473.07
Other	10	£455.67
Physical Support	270	£514.80
Sensory Support	10	£686.79

- By provision setting the residential to nursing split is 2 third to 1 third in favour of residential.
- Over 70 per cent of provision type placements are standard.
- Over 2 thirds of care home customers are female
- The largest age cohorts in care homes are the 75 to 84 and 85 to 94 age groups but average weekly costs are 2 to 3 times higher for 18 to 44 age groups.



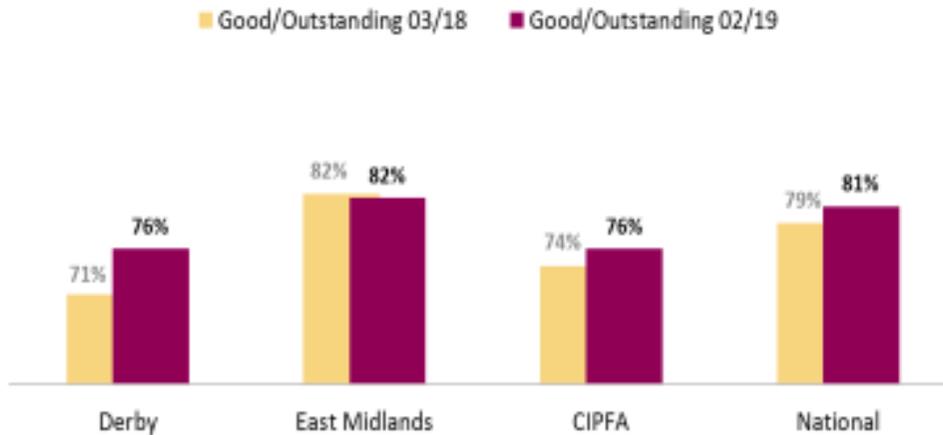
# CQC Quality Ratings for the Care Home market in Derby

**Quality Ratings for Care Homes by Authority / Group - CQC data February 2019 – Last visit score**



The average level of quality across Care Homes in Derby, as defined by CQC overall quality scores, is in line with our Chartered Institute for Public Finance (CIPFA) Comparator Group average, and we are slightly below regional and National Averages

**Quality Ratings for Care Homes by Authority / Group - CQC data March 2018 - Feb 2019**



Derby's ratings have improved and the gap has closed compared to National, Regional and CIPFA comparator group benchmarking averages since March 2018

- 8% below national averages for the sector in March 2018, now 5%
- 11% behind regional averages for the sector in March 2018, now 6%



# CQC Quality Ratings Residential and Nursing Comparison

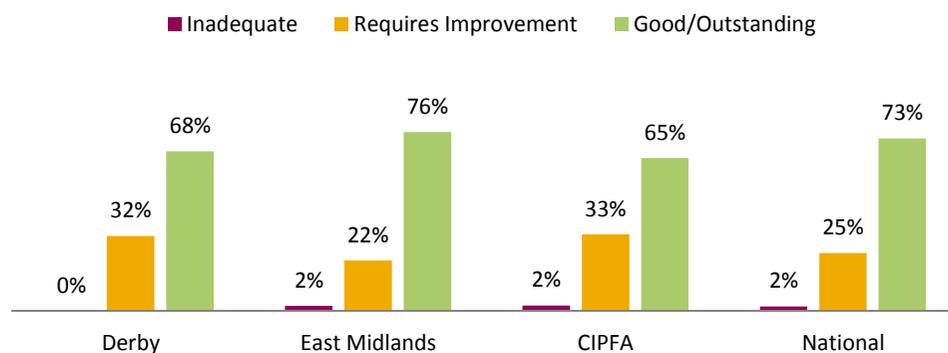
Quality Ratings for Residential Homes by Group - CQC data Feb 2019



The average level of quality across **Residential Homes** in Derby, as defined by CQC overall quality scores, is slightly above our CIPFA comparator group average but slightly below regional and National Averages

Residential Homes on average score slightly better than Nursing Homes

Quality Ratings for Nursing Homes by Authority / Group - CQC data Feb 2019



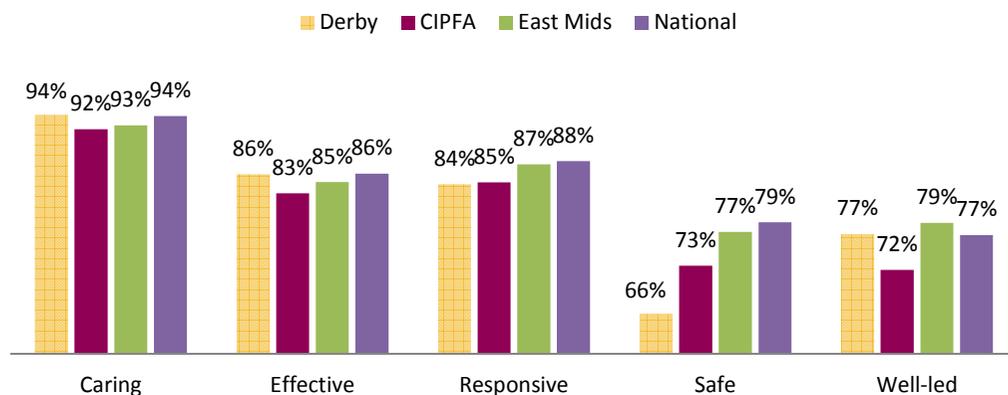
The average level of quality across **Nursing Homes** in Derby, as defined by CQC overall quality scores, is slightly above our CIPFA comparator group average but slightly below regional and National Averages

Nursing Homes on average score slightly worse than Residential Homes



# Quality Ratings breakdown across the CQC quality domains

Quality Ratings by Quality Area for Care Homes by Authority / Group  
- Homes Rated Good or Outstanding - CQC data Feb 2019



CQC give quality score in 5 key areas as well as an overall score

Derby's care homes perform well compared to National and Benchmarking groups for Caring, Effective and Well-led services

Ratings for responsive services are just below comparator groups

Safe domain ratings need considerable improvements as they are well below all averages

## Derby internal matrix system ratings, March 2019

Type of Home	Homes	Beds	Matrix	CQC Overall	CQC Safe	CQC Effective	CQC Caring	CQC Responsive	CQC Well-led
Residential	25	802	76%	84%	72%	92%	100%	92%	80%
Residential - Dementia Premium	3	127	67%	67%	33%	67%	100%	100%	67%
Nursing	23	928	65%	74%	57%	83%	100%	76%	70%
Specialist Residential	16	169	81%	81%	69%	100%	100%	94%	81%
Specialist Nursing	3	48	100%	100%	100%	100%	100%	100%	100%

Currently 70 homes under contract in the City, 2084 beds.  
The Council commissions roughly 33% of the beds in the city market.  
Matrix ratings are lower than CQC overall scores and are slightly higher **to attend**

## Quality Visits based on Matrix scores / risks.

- 2018 – Visited 67 out of 70 providers. Mixture of Quality Assurance visits, Safeguarding, Audits, Follow Ups. 326 visits conducted by Service Quality & Brokerage in Total
- 2019 – 31 providers visited already. 16 providers with Amber / Red matrix scores. 11 have been visited during 2019.



Derby City Council

# Quality Issues and Actions

Current Issue affecting Quality	Resolution Steps
<p><b>Below Average Safety and Well-led ratings for CQC inspections</b></p>	<p><b>SQBT complete focused audit on these areas and make referrals to Environmental Health, Medication Optimisation in Care Homes Team, Health &amp; Safety, Derbyshire Fire and Rescue and Infection Control, updating CQC on developments</b></p> <p><b>Specialist Training promoted at engagement events, Service Quality and Brokerage disseminate good practice guidance and opportunities for development for example: Skills for Care, Delirium training, Infection Control, Dementia, Medication Training, Falls Prevention etc</b></p> <p><b>Increased visit frequencies to at Risk Providers to monitor improvements</b></p> <p><b>City and Region wide Multi agency meetings held in accordance with the Provider failure escalation policy</b></p> <p><b>Proactive / Preventative work</b></p> <ul style="list-style-type: none"> <li>• SQBT challenge providers in relation to their management structure and support systems</li> <li>• Thematic discussions at Quarterly Provider Forums</li> <li>• Scrutiny of inspections and audits to disseminate lessons learned across the sector to providers</li> <li>• Develop process to receive quality information and outcomes from service reviews</li> <li>• Brokerage to source placements rather than Social Workers, this will build up resilience with a few staff having specialist knowledge and ensure appropriate placements are made at all times</li> </ul>

# Quality Issues and Actions

Current Issue affecting Quality	Resolution Steps
<p><b>Recruitment and Retention of high quality staff</b>  <b>(acute issues with Nurses currently) – increased expected demand in future with Elderly Population</b></p>	<p>Recruitment and Retention support provided to all providers.</p> <p>Links with Joined Up Careers for Providers to access Specialist Advice</p> <p>Links with Skills for Care for apprenticeships, and links with Universities to lobby and shape the future staff market.</p> <p>SQBT promote these links with Care Home Providers and monitor their engagement</p> <p>Annual consultation for a fair Financial uplift for the sector</p>
<p><b>Administrative Burdens</b></p>	<ul style="list-style-type: none"> <li>• Online Desktop Quality Assurance for providers</li> <li>• Possibility of passporting Quality Information from other established Quality Awards in the care sector into matrix assessment – reducing duplication</li> <li>• Risk based exception reporting for Medication – rather than every circumstance</li> <li>• Specific secure Provider access portals into our social care software</li> </ul>
<p><b>Organisational Safeguarding</b>  <b>Volume of referrals</b></p>	<ul style="list-style-type: none"> <li>• SQBT respond appropriately to enquires</li> <li>• Undertake visits</li> <li>• Collate themes and trends</li> <li>• Work with providers to ensure lessons learned are implemented</li> </ul>



# Quality Improvement Actions

Commissioning 4 Change	Working in Partnership to improve care
<b>Provider engagement events</b> are arranged where we will be sharing the mechanism for the future procuring of Care Home services	<b>Care Quality Commission</b> – regular liaison, networking and information sharing meetings.
<b>New service specifications</b> are being designed to better meet the needs of our customers	<b>Clinical Commissioning Group</b> – Quality in Care meetings involving nursing and therapy input
Care Home providers will need to pass a <b>baseline criteria</b> before any future contracting and a quality assurance framework will be in place	<b>Derby Safeguarding Adults Board</b> – performance sub group Derbyshire information sharing meeting
<b>Systems are being developed for the assessment of Care Home services</b> to be passed into the Brokerage team to commission the most appropriate Care Home placements for customers	<b>Regional Quality Surveillance Group</b> with all NHS commissioners
Annual on-line self assessment <b>quality assurance</b> will be <b>mandatory</b>	<b>Quarterly consultation meetings</b> where all providers are invited to attend
This will feed into the <b>internal RAG rated quality assurance Matrix</b>	Additional partner meetings with Police and Fire & Rescue Service
This Matrix is being developed to <b>produce reports</b> that will determine thematic audits by the team <b>based on high risk/high cost placements</b>	



## How can members get involved?



1. Understand the pressures of recruiting good quality carers and qualified nurses
2. Access CQC website for all latest inspections
3. Report concerns to Service Quality & Brokerage team

Service Quality and Brokerage Team

Team number: 640791

Email: [carebrokerage.duty@derby.gov.uk](mailto:carebrokerage.duty@derby.gov.uk)



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