Cambridgeshire County Council

PETERBOROUGH CITY COUNCIL

Development of accommodation based care

Market Engagement Event
16 March 2021

Welcome and Purpose

Future provision of accommodation-based care for older people in Cambridgeshire and Peterborough

Purpose:

- To share our findings and ideas for information only*

- To provide the opportunity for providers to influence strategic direction

Introductions *– please introduce yourself on the chat (name, role, organisation)*

*First iteration of our data, findings and ideas; subject to Council approval

House rules and information

House Rules

- Microphones on mute
- Hand up function to speak
- Use Chat for questions
- Slides & written response to questions circulated after the event
- Event will be recorded

Please contribute!

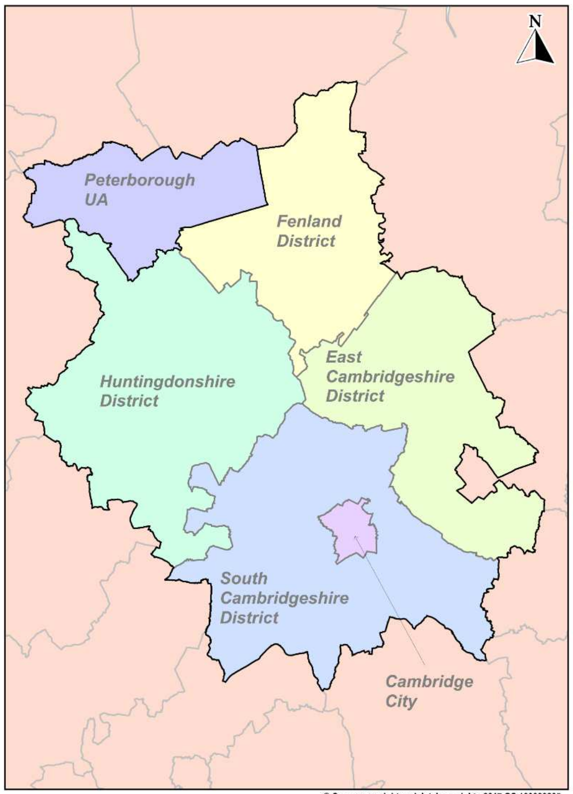
Parking bay

- Covid-19 response
- Post Brexit procurement plans
- Pay to Plan
- Inflation & uplifts

Agenda

- A bit about us
- Forecasting future demand
  - Headlines from our Accommodation Needs Analysis
  - Group discussion: What's your forecast? How do you do it?
- Our initial thoughts on how to meet demand and market intervention
  - Breakout group discussion: What is your view?
- Next Steps and 1-1 meetings

Cambridgeshire and Peterborough



Cambridgeshire County Council and Peterborough City Council are separate authorities each with their own democratically elected Members.

The two Councils have developed their relationship through the formation of an almost wholly shared senior management team and an increasing number of shared or fully integrated functions and services.

The Cambridgeshire and Peterborough population is forecasted to grow from over 800,000 in 2011 to just over one million in 2036. The number of older people is expected to rise significantly. This will lead to increasing additional demand for services

Market Position Statement: adult-social-care-market-position-statement

Cambridgeshire and Peterborough

Cambridgeshire is a county of contrasts with five districts: Huntingdonshire, South Cambridgeshire, Cambridge, East Cambridgeshire. Four of these are classified as rural.

Economic growth in Cambridgeshire has outpaced both the East of England and UK over the last decade. Primarily driven by rapid business creation and growth in Cambridge and South Cambridgeshire. This growth provides many opportunities for development, but people in some of our places are not easily able to take full advantage of these opportunities.

Peterborough City Council was formed as a unitary authority in 1998. Peterborough is a fast growing city that has seen sustained and often rapid growth over time and is affected by relatively high levels of poverty and deprivation. Peterborough's population is young, multiculturally diverse and growing at a fast rate.

Corporate Priorities

Cambridgeshire County Council

- A good quality of life for everyone
- Thriving places for people to live
- The best start for Cambridgeshire's children
- Zero carbon emissions for Cambridgeshire by 2050

[Business Plan 2020 to 2021 - Cambridgeshire County Council]

Peterborough City Council

The new corporate priorities* are:

- Pride in our communities, our places and our environment
- First rate futures for our children & young people, quality support for our adults and elderly
- Better jobs, good homes and improved opportunities for all

*subject to consultation and ratification by Full Council

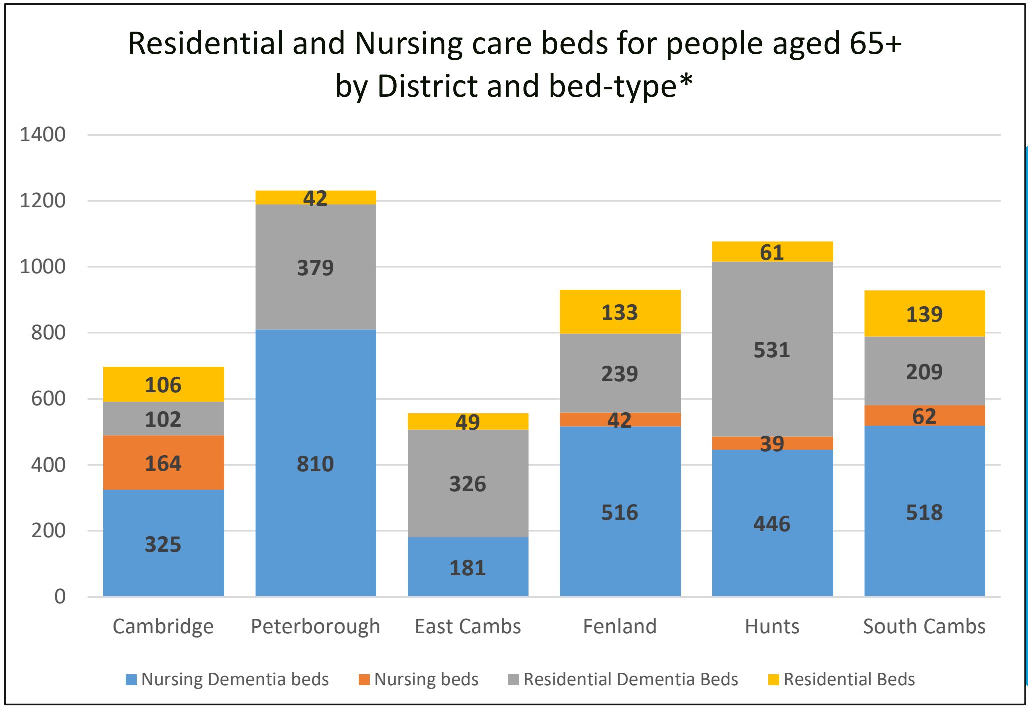
Market Overview

5,419 CQC registered care home beds in the county

- Cambridgeshire: 4,188 beds
- Peterborough: 1,231 beds

CCC & PCC commission 1,734 beds (32%)

CCC & PCC commissions 24/7 care for 983 flats in 23 Extra Care schemes



* Data from the published CQC Care Directory 01.04.2020.

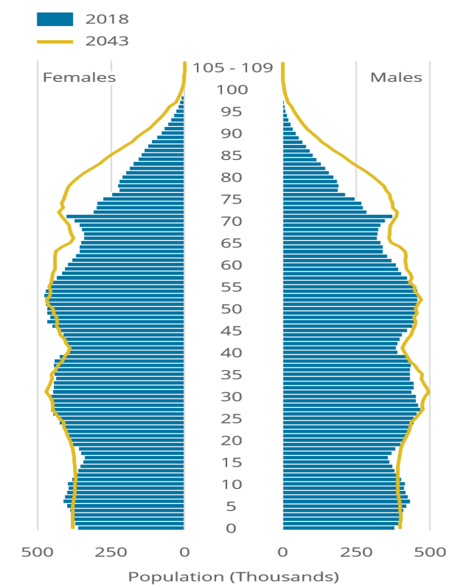
*First iteration of our data, findings and ideas; subject to Council approval

Population forecasted to grow by 48% in next 15 years. Levels of care required will also grow sharply

Cambridgeshire and Peterborough 2021-2036
The 65+ population will increase by 48% from 163,190 to 241,060 people.

The 85+ population is estimated to increase by 110% from 22,980 to 48,200.

Predicted increases for
- People with dementia
- People experiencing a fall
- People with complex conditions
- People with multiple co-morbidities



National population change 2018-2043
The chart opposite shows the increase in the 65+ population.
We focussed on 2021-2036.

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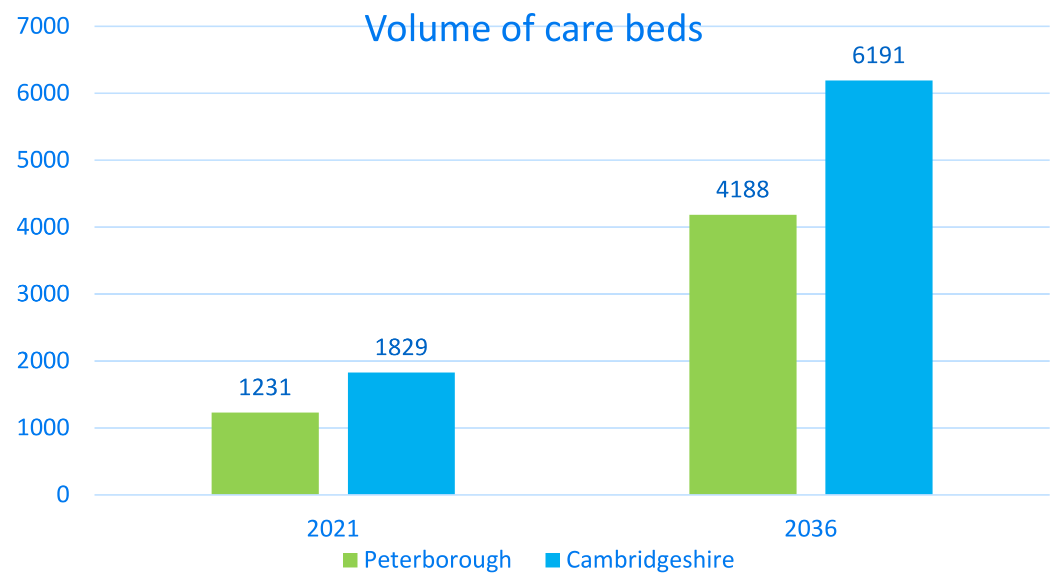
Applying this growth to current levels of care home provision suggests the market needs +2,601 care home beds over 15 years

From the current 5,419 care home beds there will be a requirement for an additional 2,601 care home beds by 2036 (eqv. 48% growth)

- Cambridgeshire: +2,003 beds
- Peterborough: +598 beds

N.B. ***This assumes the proportion of older people accessing care homes remains the same***



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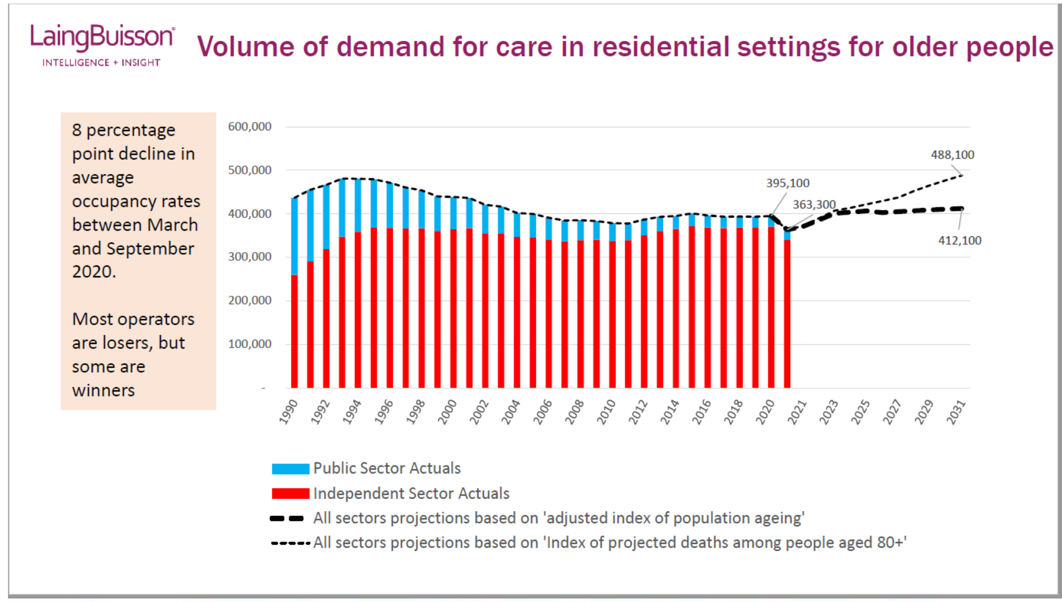
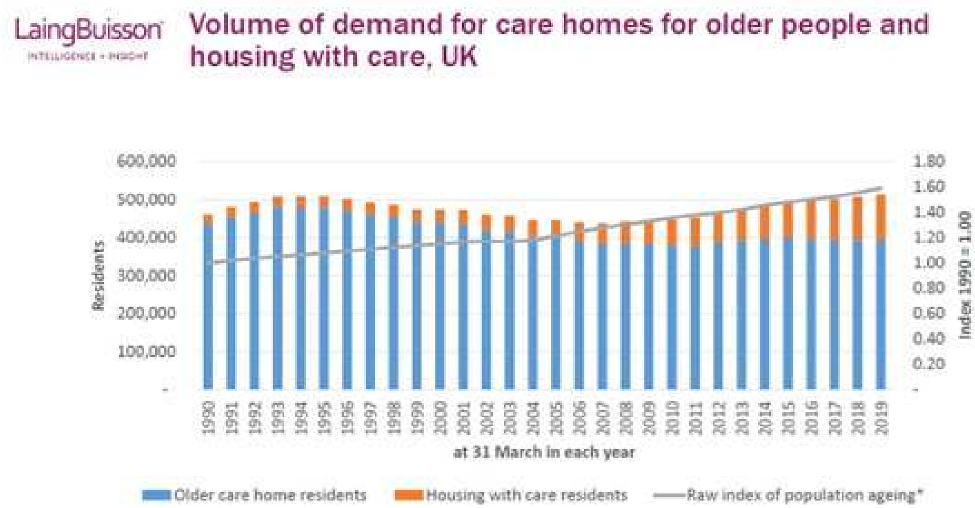
However, independent research indicates lower volumes and diversification in the market.

Laing & Buisson (L&B) national research

- forecasts a much lower rate of 4% - 23%. This equates to between 216 and 1,246 beds
- suggests population growth has been absorbed and/or diverted to other forms of care
- implies housing with care will account for a greater % of demand in the future





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Market trends: Our early predictions

- Demand for traditional care homes will increase slightly (4-23%) but not at the rate we initially forecast (i.e. 48% over 15 yrs)

- Existing care homes will refocus to meet complex need (nursing, dementia etc)

- Investment for refitting existing care home stock

- Biggest growth in demand will be for housing with care and home care solutions

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General discussion: Market Trends & Forecasting

Questions to consider:

1. Do you agree or disagree with our early predictions?
2. What trends are predicted for the care home and housing with care markets?
3. As operators and developers how do you forecast demand?
4. What sources of data are used by your organisation?
   We used Acorn underpinned by ONS and SALT

To contribute please use the hand function or leave a comment in the chat chat if you prefer

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An approach to meeting future demand

Our early thoughts

Cambridgeshire County Council

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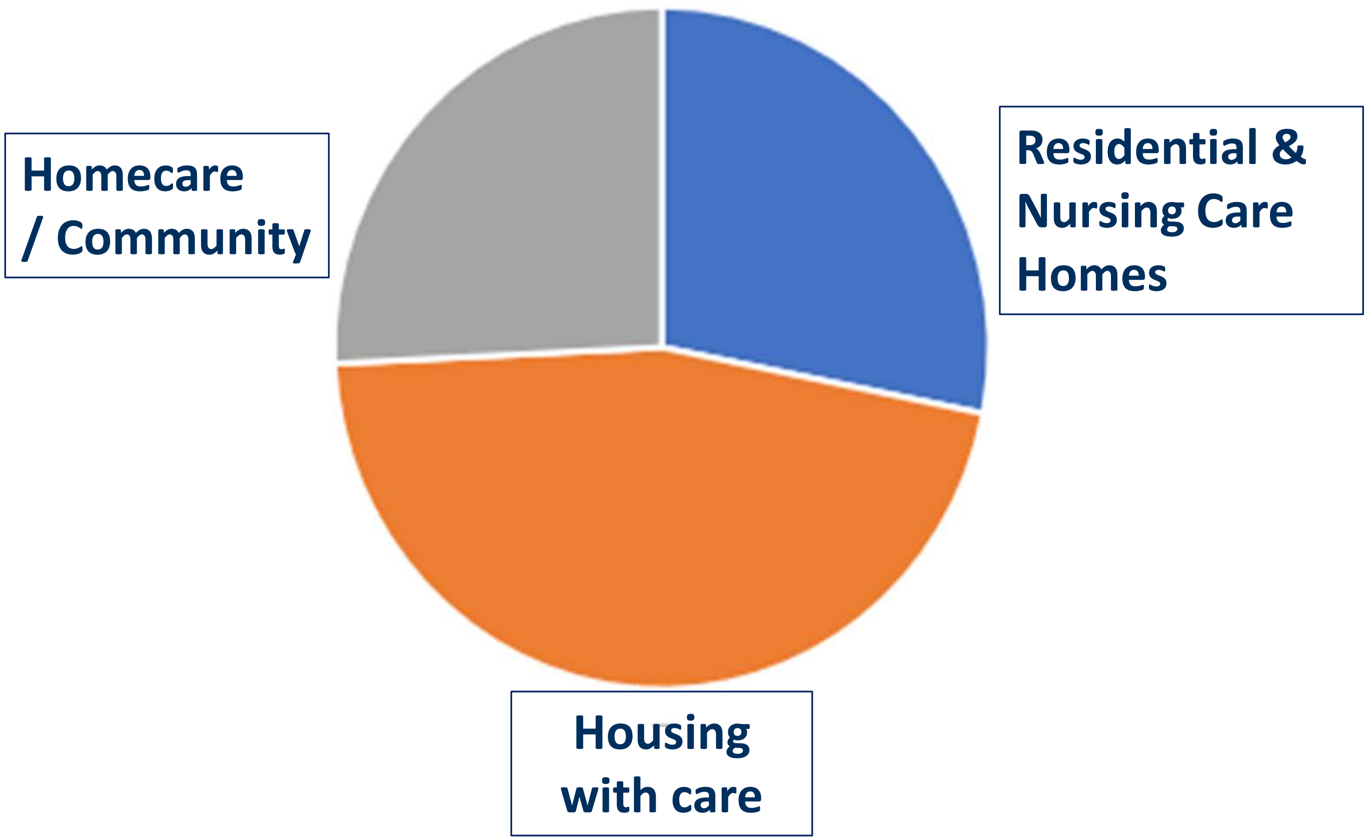
We think demand will be met in 3 ways but in what proportions?

Cambridgeshire County Council



Let's assume the level of demand for care homes increases by 13.5% (mid-point of Laing-Buission forecasts) n=731 additional beds

Our model assumes the biggest proportion of demand growth will be met by housing with care (c.1/2) followed by homecare (c1/4)

Are these the right proportions?

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How that might look in numbers

Overall market requirement over the next 15 years (48% growth in +65s)		Indication of how the requirement could be met		
			Beds or equivalent	% of growth
Using population growth, CCC research and external research information	Equivalent to 2,601 beds	Residential/Nursing setting	731	28%
		Housing-with-Care	1,200	46%
		Domicilary care and other community solutions	670	26%
		Total	**2,601**	**100%**

N.B.
If we apply 48% population growth to our existing Extra Care provision this would add a further **c.471** units to these figures

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PCC & CCC Market Approach: Our early thoughts

Cambridgeshire County Council

Residential & Nursing Care Homes	• **Market & Health led** • PCC & CCC support via market shaping (MPS, market engagement etc) • Stimulation of tenancy-based models
Housing with Care	• Joint with market and Districts • **PCC & CCC direct intervention** focused on higher end of need • Market lead on lower end of need
Homecare & community solutions	• Joint with market & voluntary and community sector • PCC & CCC direct intervention to expand and diversify home care and community provision (e.g. social enterprise, microenterprise, mutual aid)

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MAINSTREAM HOUSING

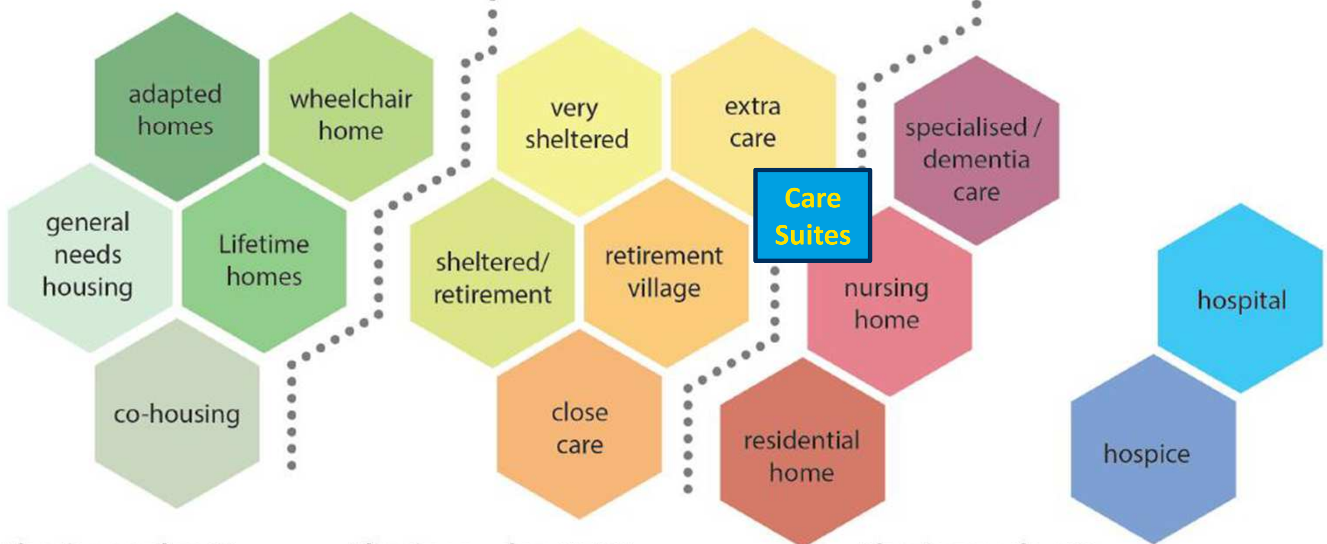
Individual homes to buy or rent – not designated for any specific user group (though Lifetime Homes includes age-friendly features and wheelchair housing is specially designed). Personal care, support, other services and amenities available within the community.

SPECIALISED HOUSING

Groups of homes (usually flats) to buy or rent – designated for older people (typically 55+). Flexible personal care and support usually arranged or provided within the development together with shared facilities and activities. Common facilities may also be shared with the wider community.

CARE HOMES

Care homes are a residential settings where a number of older residents live, usually in single rooms. Full-time personal care and support is typically available within the development together with shared facilities, activities and catering.



Planning use class C3 (dwelling house).

Planning use class C2 / C3 (depending on scheme)

Planning use class C2 (residential institution)

LA Market Shaping

Initial thoughts on LA direct market intervention to meet demand for bed-based care:

- **focus LA intervention on higher need provision (Extra Care and Care Suites)**
- **Stimulate development of affordable capacity**
- **Stimulate new models of delivery which can flex to meet changing care needs and have a tenancy-basis**
- **Stimulate new capacity via**
  - **D&B or DBOM opportunities**
  - **block contracts**
  - **collaboration with RSLs/developers**

What is a Care Suite?

- Tenancy based model.
- 24-hour care/support including nursing available
- Larger en-suite rooms with kitchenette and sitting area
- Focus is to move away from an institutionalised care facility.
- Greater enabling and maintaining independence.

Could Care Suites and Extra Care co-exist on the same site as a blended model?

- The level of support can increase as the person's level of care need increases.
- Round the clock care is available, including nursing care.
- Visitors can stay overnight.
- Tenants need never to move home again.

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An opportunity to innovate delivery models and cross markets?

Care Suites – *bringing nursing into housing with care*

Mixed models of Care Suites and Extra Care/Sheltered Housing - *meet tenants' increasing needs without changing site*

Operate across the **community market**
- *Deliver homecare via outreach model*
- *Provision of day care*

Inclusion of **reablement** flats to support hospital discharge and admission avoidance

Multiple cohorts such as adults with learning disabilities

What other opportunities are there?

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Now we'd like to hear your views on:

1. Our assumptions about how demand might be met
2. Our potential market approach
3. Innovations in delivery models

To contribute please use the hand function or chat if you prefer

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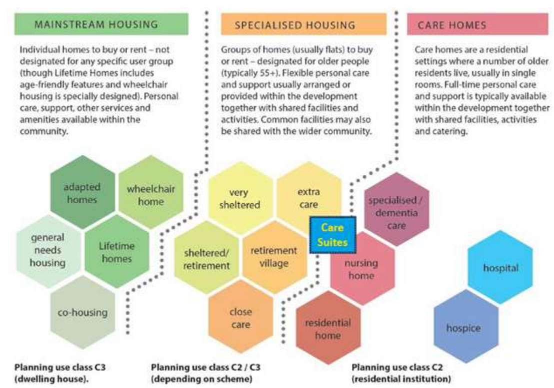

Our initial thinking to meet demand for bed-based care is to

- **focus LA intervention on higher dependency end of the spectrum (extra care and care suites)**
- **Stimulate development via direct market intervention (D&B or DBOM opportunities)**
- **Stimulate new models of delivery which can flex to meet changing care needs**

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Next Steps

Cambridgeshire County Council

1:1 sessions available with commissioning team

Please request via exit questionnaire

We will communicate plans for the next stage of market engagement

Use the chat function or exit questionnaire to tell us what you would find useful

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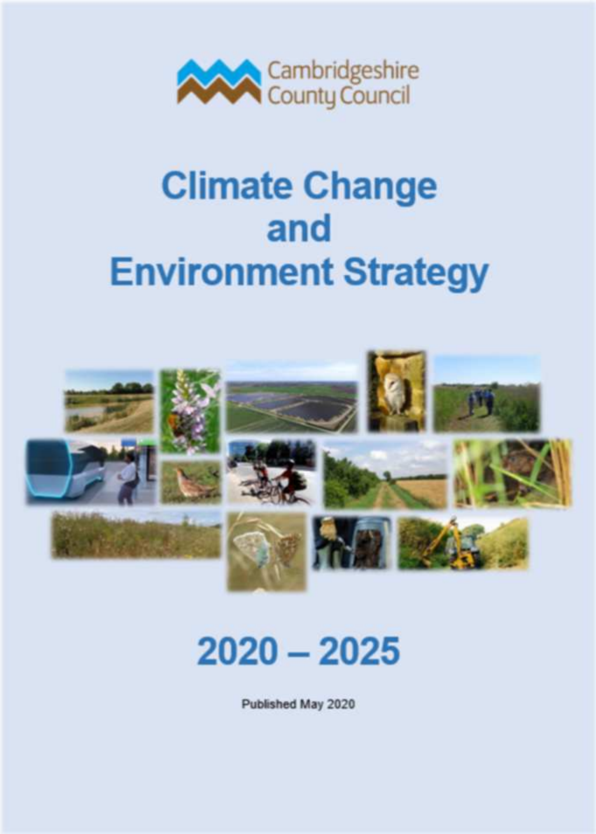
Appendix 1

Climate and Environment (CCC)

Climate Change and Environment Strategy 2020-2050

- Why climate change is important
- Cambridgeshire County Councils response
- Timetable to near net zero emissions
- Our current emissions levels
- Our priority areas for construction based projects
- How you can help



Further questions: mlei@cambridgeshire.gov.uk

Climate and Environment Emergency

In May 2019, Cambridgeshire County Council **declared a Climate and Environment Emergency**, which committed us to the development of a Climate Change and Environment Strategy.

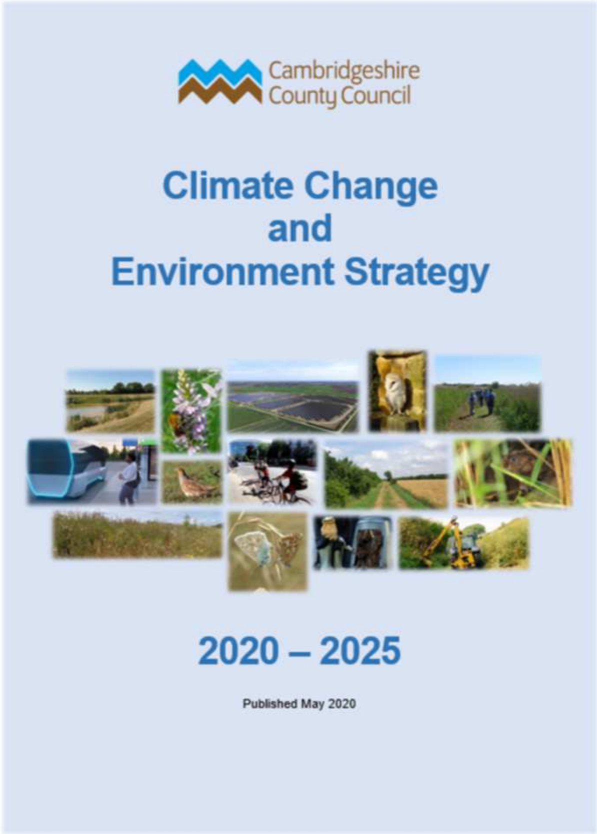
Why declare a climate and Environment emergency?

- Our natural environment is the most precious inheritance; **we act as caretakers for the next generation;**
- **Society is facing global challenges** of population growth, climate change and equalisation of living standards;
- It is a highly time sensitive problem; **every day action is delayed** it becomes **more likely we will pass irreversible environmental tipping points.**

People of all ages, all walks of life and all social and economic backgrounds in Cambridgeshire are becoming increasingly concerned they will leave or inherit an environment that is irreparably damaged, forcing others to live with the consequences of the decisions we make today.

Climate Change and Environment Strategy

- Climate Change and Environment Strategy **agreed at Full Council May 2020**
- Sets out **15 priority areas** for action
- **7 targets** will measure success
- A **comprehensive action plan** was also approved



What changes is the Council making?

Climate Change and environment is to be incorporated into all decisions via significant implications in committee reports

Carbon Valuation can be incorporated into business cases
- Helps business cases that have associated carbon savings

Carbon emissions assessment will soon be incorporated into procurement processes

Climate friendly design & Building longevity
- Can help to keep maintenance and operational costs down
- Can improve service delivery

Pathway to net zero emissions

May 2020

Climate Change and Environment Strategy Approved at Full Council

New Corporate Objective:

Net Zero Carbon for Cambridgeshire by 2050

2023

50% reduction in the carbon footprint for electricity and CCC- controlled assets

100% of Council strategies include policies that tackle Climate Change and provide natural capital enhancement

2025

All county Council owned and operated buildings and vehicles to be fossil-fuel free

All Council directorates to implement measures to ensure their services are adapted to climate change

2030

Reduce the Council’s 'scope 3' emissions by 50.4%

Sign up to a shared target with partners and the community to deliver 50.4% emissions reductions for Cambridgeshire based on 2018 baseline

2050

Deliver Government's net zero-carbon for Cambridgeshire

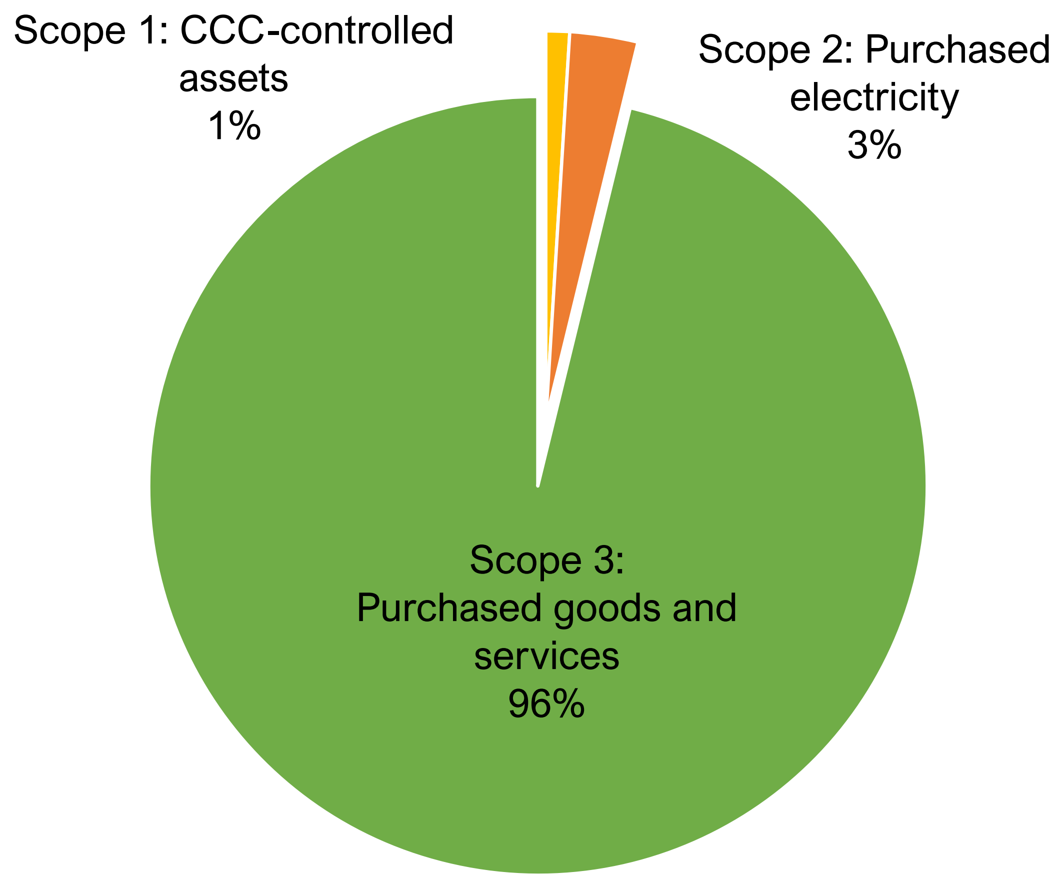
Deliver 20% biodiversity net-gain across all Council property, land projects and wildlife sites

The Council's known Carbon footprint is **203,665 tonnes CO_2e** (gross)

TARGET:

Reduce emissions from purchased goods and services by **50.4%** by 2030

This means everything we buy, from construction to energy to stationary to care beds.



Planning policy soon to state that developments should leave nature in **measurably better state** than beforehand

TARGET:
20% biodiversity net-gain across all Council property, land projects and wildlife sites

olicy paper

30 January 2020: Environment Bill 2020 policy statement

blished 30 January 2020

nts

- y we need the vironment Bill
- vironmental governance
- ew direction for ources and waste nagement
- proving the air we eathe
- livering sustainable ter resources
- storing and enhancing ture and green spaces
- emicals regulation EACH)
- livering environmental bition at the local level

3 Key Priority Areas for Construction Based Projects

Energy Efficient, Low Carbon Buildings	Green and Blue Infrastructure	Reducing Waste and Tackling Pollution
Near Zero Energy Buildings Standard: agreed at General Purposes Committee 2019	Using nature based design solutions like Sustainable Drainage Systems	Plastics Strategy 2019 – to reduce single use plastics and waste
All buildings owned and occupied by CCC to be fossil-fuel free by 2025	All properties to be adapted to climate change eg. greenery to prevent over-heating	Use of recycled materials where possible
Emerging building regulations to improve energy performance and cost of utilities set to increase	Improving health and wellbeing through green open space	Minimising waste during construction and utilising recycling streams

Why should suppliers consider these?

Current and Emerging Building Standards

- Building regulations are becoming increasingly stringent on environmental standards
  - Regulation 25B building Regulation 2012 – Nearly Zero Energy Building Requirement for Public Buildings
  - Early preparation for diversified supply chains catering for low carbon heating
  - New buildings to not be connected to gas from 2025
- Various Government Strategies leading to consultations affecting building design

  e.g. Clean Air Strategy and Ventilation
- New Local Plans look to be more stringent on development expectations and planning conditions
- Increasing public pressure for improved energy efficiency – even PassivHaus

The Market is Shifting

- Majority of Local Authorities declaring climate emergencies and implementing ambitious carbon targets
- Like Cambridgeshire, increasing activity around leveraging procurement processes and contracts to deliver these targets
  - Provision of carbon emission estimates and lifecycle cost analysis can also aid in investment decisions
- Provision of Carbon emissions data increasingly required and likely to expand in scope

  e.g Streamlined Energy Carbon Reporting (SECR)
- Over time, new service users will have expectations of "greener" ways of living