

## Improving Lives, Improving Life: A Summary



The findings of a study on the key strategic issues facing the long term care for older people sector.

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## Who is involved?

English Community Care Association (ECCA)<sup>1</sup>, P&G Professional<sup>2</sup> and Laing & Buisson<sup>3</sup> have collaborated to produce 'Improving Lives, Improving Life,' a major qualitative study believed to be the first of its kind. The study was commissioned to probe the dynamics and trends behind the strategic issues facing the long term care for older people sector.



Senior executives from 30 of the major group operators and ten care associations were interviewed, representing some 30% of the long term care of older people sector in England. The in-depth telephone surveys, consisting of over 90 questions were conducted in late Spring 2004 by Laing & Buisson consultants. For every completed survey, P&G Professional made a donation to The Relatives and Residents Association.

## Why was the study commissioned?

'Improving Lives, Improving Life' addresses a diverse range of issues affecting care home owners and operators. The study was designed to achieve the following objectives:

- Provide information of value to those working in the sector
- Provide qualitative data to complement existing quantitative information
- Gauge the reactions of the sector to the current key issues
- Allow care home operators to make comparisons with their peers
- Give the sector a powerful voice to speak to the government, other policy makers and potential partners.

<sup>1</sup> ECCA is the largest representative body for community care in England and it speaks on behalf of members representing the vast majority of care beds across the sector.

<sup>2</sup> P&G Professional has demonstrated a strong commitment to the care sector. The company manufactures high quality laundry and cleaning solutions, specifically tailored to tackle the challenges faced by care home operators.

<sup>3</sup> Laing & Buisson, a leading provider of market intelligence for this sector, was commissioned to conduct the interviews for the study, analyse the data and produce the report 'Improving Lives, Improving Life' detailing the findings.

### What were the findings?

The overall tone of the report is positive. Those interviewed express strong commitment to their role as providers of quality care. Contrary to the popular image, operators are open to new ideas and actively developing innovative solutions to the significant challenges they face.



When asked about the future shape of the sector, participants made a number of key points:

- Traditional care homes have an important and cost-effective place in the spectrum of models of care.
- The absolute NUMBER of people needing long term care in care homes and other settings will increase. This is due to the significant projected increase in the population of older people, especially the over 85s who tend to be more frail. However, the PROPORTION of older people receiving care in traditional homes may decrease as alternative models of care develop.
- New models of care are welcomed, as individuals' needs become more complex and the number of people with dementia increases. Operators recognise that investment is needed in all types of long term care. This is hampered by problems with land availability and planning permission.
- The true costs of alternative models of care are not known.
- The success of government policies on NHS hospital waiting lists depends on the availability of accommodation for older people.
- The availability of state funding for long term care, customer expectations and property market values will be fundamental factors in shaping the sector over the next five years.
- Operators would like to see commissioning and regulation used to further improve the quality of life of older people.
- The current shortage of people to deliver care will continue and is a key concern.

The study asked participants about the key influences on the strategic development of the sector. In descending order of importance these are:

- Fees for local authority funded residents
- Regulation
- The self-funding market
- Public and media perceptions of the industry
- Growth of public sector care home provision.

Other key influences on the development of the sector into the future are:

- Government policy on care provision
- The significant increase in the population of older people
- New ideas on funding e.g. differential fees to reflect quality
- Availability of staff
- Ability to obtain planning permission for all types of accommodation with care
- Assessment and commissioning practices.

Respondents were then asked to discuss four key areas - plans for growth and development, outsourcing, regulation and partnership and staffing issues.

### Plans for growth and development

- 93% of group operators have plans for 'new build' and 87% plan extensions on existing sites, concentrating on the strong self funding market and locations where local authorities pay adequate fees. Care association members mainly tend to concentrate on building extensions.
- The sector is open to innovation and many group operators are already providing alternative models of care e.g. sheltered accommodation and extra care. A large proportion plan to expand or diversify into these models in the future.
- The sector actively uses a number of information sources to monitor new trends and developments including market reviews/reports, conferences, trade press and professional associations.
- Four out of five group operators interviewed regularly monitor developments in long term care overseas, as do a few smaller operators.



### Outsourcing

This is believed to be the first study to investigate this subject.

- 70% of major group operators outsource one or more services within their homes. The main services to be outsourced are catering, housekeeping, gardening/landscaping and maintenance.
- Due to the smaller scale of their operations, only a few care association members are believed to outsource services.



### Regulation and partnership

- Operators recognise the need for regulation and the magnitude of the task facing the regulatory body.
- There is a strong desire for the regulator and the providers to work in partnership towards the shared objective of improving quality of life for older people.
- The National Minimum Standards are viewed as consistent but the implementation by the National Care Standards Commission was not.
- Operators want regulation to be used strategically to drive up standards, with a focus on outcomes rather than inputs.
- The sector has high hopes that the Commission for Social Care Inspection will play a strategic role in areas such as capacity planning, commissioning, staffing regulations and the link between fees and quality.
- The Care Home Regulations and the National Minimum Standards are perceived to have had a positive effect on staff training and development but a negative effect on efficiency, staff recruitment, administration workload and the perception of the sector.
- The sector has a strong desire to work in partnership with the government, Primary Care Trusts and Social Services but this is not yet happening consistently.
- Those interviewed see ECCA as the leading national professional association for the long term care sector.



### Staffing issues

- There is a considerable variation in the achievement of National Vocational Qualifications (NVQs) among care home staff. Respondents report that between 2% and 100% of their home managers have achieved NVQ Level 4 and between 10% and 80% of healthcare assistants have gained the required NVQ Level 2 or above.
- Care operators have major concerns about meeting the 2005 targets for trained members of care staff. This is because many trained staff leave for positions that they perceive to be more highly valued and better rewarded in the NHS or seek employment in the retail sector.
- Staff turnover is universally regarded as a significant issue. The sector has been exploring a range of creative ways to address recruitment and retention.
- The level of fees received underlies all other issues, including resources for training, where major burdens have been imposed on the sector which are NOT reflected in fee levels paid by the state.
- Some 50% of the contributors to the study think skill mix reviews are 'likely' or 'very likely'. Most operators are positive about the prospect, believing this will bring benefits to both residents and staff.



### And finally...

'Improving Lives, Improving Life' reveals the long term care for older people sector as deeply committed to the challenge of delivering quality care.

Group operators and care associations express fears that successive governments have not taken full account of the projected increase in the population of older people.



They are also concerned that many policy makers may be unfamiliar with the truth about life in a quality 21st century care home. They feel frustrated that the relationship between bed-blocking in NHS hospitals and capacity available in care homes is not generally recognised.

Despite widespread belief to the contrary, the sector IS aware of new/alternative models of care. Many care home operators have already adopted them and have plans to expand further. However, those interviewed stress there is still a role for traditional care homes in the spectrum of care provision, offering cost-effective care to large numbers of older people.

A central theme to emerge from the study is the need for partnership between the various bodies and organisations with interests in the sector. There is a fervent desire for the sector to work with the government as colleagues and not as adversaries. Operators would appreciate clarity on whether the state intends to be a provider of care or a commissioner. They would also welcome better quality commissioning and some support from the Department of Health in gaining planning permission for accommodation with care.

Many participants in the 'Improving Lives, Improving Life' study feel that the sector should engage with the government with one voice through one united professional association.



Downloadable versions of the full study findings and summary are available at [www.pgprof.com/uk](http://www.pgprof.com/uk)

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