Buckinghamshire County Council

Market Position Statement for Specialised Housing

Update and recommendations report
December 2016

1. Introduction

The original Market Position Statement (MPS), published in February 2014 (http://www.buckscc.gov.uk/media/4508823/market-position-statement-housing-2014-15.pdf), was written to present a general understanding of specialised housing supply, need and demand in Buckinghamshire over the next 20 years. It provided a strategic direction and a measured prediction of specialised housing need, so that all interested stakeholders could take timely action in a collaborative way. An update to the MPS was published in March 2015 (http://www.buckscc.gov.uk/media/4508824/market-position-statement-housing-update.pdf). This document is the second update published in December 2016.

Buckinghamshire County Council (BCC) has a significant market share in specialised accommodation and plays an essential role in commissioning and directing provision. The MPS, however, is not limited to an introspective local authority view but is a consideration for all those in need in the county.

Predicting future housing need is not an exact science, especially as it is influenced by both local and national factors that change each year. One such factor has been the implementation of the Care Act 2014, which sees housing as a crucial component of care and support, as well as a key health-related service. This update to the MPS covers the progress made since the last one and it provides a detailed examination of supply, pipeline and demand in relation to specialised housing. It also makes recommendations of what provision is needed for the future.

This MPS update reflects the changes to national data requirements for Councils relating to Adult Social Care, that they must submit to central government annually. Councils from April 2015 no longer record by primary client category, as per 'RAP' and 'ASC-CAR' activity returns, but by primary support reason. See:

https://socialcare.blog.gov.uk/2015/07/10/milestone-reached-in-adult-social-care-information/).

This MPS uses data as recorded against the new categories which means that it will not be able to provide an exact match with the old client group categories, as used for previous MPS, and therefore, there will be some significant disparities when trying to make comparisons, like for like. In addition, there has been the work of transitioning existing data to the new recording categories during 14/15 and this has affected the accuracy of data during this period. To ensure the information reported is as accurate as possible, this MPS update will only use data for 15/16.

This MPS in line with previous versions uses CQC data on registered providers, which give detail on the number of beds or units within each of their services. It is available as a public download from their website (http://www.cqc.org.uk/content/how-get-and-re-use-cqc-information-and-data#directory). The data provides an indication of the supply available in Bucks whether for residential care, nursing care or supported living and as a measure for calculating BCC's market share against. However, this need to be treated with caution as the CQC data does not tell us of current voids within these beds or whether they are used for their intended purpose, e.g. the client may be in a residential care bed but the provision may be for nursing care.

2. Executive Summary

Older People (OP)

The OP section of the MPS update has the most analysis and detail due to the recognition that the largest share of BCC spend is on OP care placements.

BCC purchases approximately 1,751 nursing and residential and extra care placements (block and spot) for OP, with a slightly higher allocation for nursing (53%). Of these, around 228 nursing and residential places are purchased out of the county.

BCC market share has grown at 45% and 47% for nursing and residential care respectively since 14/15, when its share was 31% as reported in the last MPS.

Pipeline developments indicate a large interest in residential and extra care development but very little in nursing.

Analysis, commissioned by BCC to understand OP housing needs and how it should be met between now and 2035, have shown the need for improved housing options for an ageing population in Bucks. Population projections show that Bucks will have an ageing population above the national average, with particularly high numbers for Chilterns and South Bucks. This will increase across the county in the future, particularly for Aylesbury Vale.

The increasing older population will mean increased demands on Health and Social Care and BCC (and NHS) are seeing the role of housing as a key driver to mitigate this demand. More suitable and available housing options for OP will help to prevent and/or delay the need for Health and Social Care interventions. Recommendations have been made to develop, as well as the range of housing with care, where the allocations need to be for each district.

Key to realising the ambition of delivering more suitable and available OP housing in Bucks is the need for partnership working between BCC, NHS, District Councils, developers and housing providers, to identify sites, joint investment and development.

Learning Disabilities (LD)

BCC purchases approximately 595 placements (spot and block) for LD clients, with 175 of those being out of county.

BCC’s block purchase consists of 220 places consisting of 52 residential and 168 supported living places.

Supported living accommodation is continuing to grow in line with BCC’s priorities to increase its capacity as an alternative to residential care and also to reduce the number of out of county placements.

BCC has almost total market share for LD supported accommodation, since there are very few LD self-funders. Remaining market share is usually of NHS, other local authorities or voids.

Future need is to continue growth of supported accommodation, spatially across Bucks, and to cater more for older clients with LD. BCC also see the need for more general needs accommodation for LD clients, who can transit from supported living accommodation, thereby releasing capacity. BCC wants to work with the District Councils and housing providers to achieve this.

Autistic Spectrum Conditions (ASC)

Currently in Buckinghamshire there are insufficient appropriate housing options for adults with autism. As a consequence some placements are made out of the area. The aim is to develop support and accommodation to meet an individual's needs closer to their family. Specialised provision for autism or challenging behaviour anywhere, would offer opportunity for these clients to return to Buckinghamshire, or for others to avoid an out of county placement.

Work will be undertaken to map this level of housing need in more detail and elaborated in a future MPS update.

A new supported living accommodation based service is in the pipeline for the Wycombe district and shared ownership arrangements are being explored to provide a greater level of choice.

Mental Health (MH)

BCC purchases approximately 284 placements (spot and Block) for MH clients, with 63 of those being out of county. BCC have 89 block places for extra care, residential and supported living services

No further capacity in supported living accommodation is required for MH clients. Focus needs to be on working with District Councils and housing providers to make available more general needs accommodation for MH clients to move on, where able to.

Developing extra care for older MH clients will be an increasing priority as there will be a 10 per cent increase in OP with psychosis in the next twenty years. It has been evidenced that this kind of provision has been very successful in meeting the needs of this care group.

Physical and Sensory Disabilities (PSD)

BCC use spot purchase for all its PSD placements and these involve 225 places for nursing, residential and supported living, with 63 of these as out of county.

Our future direction for specialised accommodation for PSD is likely to involve more integration with supported living provision for LD, as many PSD clients will have cognitive disabilities or co-morbid conditions.

We will continue to support the development of supported living services as an alternative to residential care and to reduce the number of out of county placements. There are probably a disproportionate number of PSD places in residential care, and these need to be reviewed as possible candidates for supported living accommodation.

We see equipment, including assistive technology, and adaptations, increasingly critical to support PSD clients to live independently, especially where they do not have additional disabilities. Likewise for MH, we will be working with District Councils and providers to support transition of PSD clients, where possible, into step down accommodation, supported by use of equipment and technology, as well as lower levels of support.

Home adaptations have an important role in supporting PSD clients to remain independent and living in their own homes, but also in avoiding the cost and resource in dismantling the adaptation and putting the home back on the market as a general needs home. An Adapted Housing Register detailing the provision and whereabouts of accommodation could maximise resources and target/protect, already adapted housing stock for use by PSD clients. This will be taken up with the District Councils as an area of discussion.

3. Older People (OP)

BCC purchased places (August 2016)

BCC purchases approximately 1,751 nursing and residential and extra care placements (block and spot) for OP, with a slightly higher allocation for nursing (53%). Of these, around 236 nursing and residential places are purchased out of the county.

BCC has a block purchase of 643 nursing, residential and extra care placements as follows:-

- 228 nursing places made up of 220 nursing and 8 EMI (Elderly Mentally Infirm, otherwise known as Dementia) nursing places.
- 368 residential places made up of:-
- 336 residential places
- 32 EMI residential places
- 45 extra care places

The following tables show the geographical distribution of these places (block and spot), separated into OP general nursing and residential; and OP EMI nursing and residential.

Table 1: BCC purchased OP non-EMI places across Bucks

District	Nursing	Residential	Total
Aylesbury Vale District	**254**	**100**	**354**
Buckingham	34	3	37
Great Brickhill, Wing and Ivinghoe		34	34
Greater Aylesbury	153	40	193
Haddenham and Long Crendon	4	5	9
Wendover	63	3	66
Winslow		15	15
Chiltern District	**38**	**104**	**142**
Amersham		49	49
Chalfonts	6	8	14
Chesham	31	9	40
Great Missenden	1	38	39
Out Of County	65	48	113
Out Of County	65	48	113
South Bucks District	**72**	**40**	**112**
Beaconsfield		8	8
Beeches	53	17	70
Gerrards Cross	15	15	30
Wexham and Iver	4		4
Wycombe District	**206**	**77**	**283**
Chepping Wye Valley	88	25	113
High Wycombe	97	14	111
North West Chilterns	17	24	41
South West Chilterns and Marlow	4	14	18
Grand Total	**635**	**369**	**1004**

Table 2: BCC purchased OP EMI nursing & residential care places across Bucks

District	Nursing	Residential	Total
Aylesbury Vale District	**125**	**113**	**238**
Buckingham	11	14	25
Great Brickhill, Wing and Ivinghoe		27	27
Greater Aylesbury	48	53	101
Haddenham and Long Crendon	10	4	14
Wendover	56	1	57
Winslow		14	14
Chiltern District	**14**	**75**	**89**
Amersham		32	32
Chalfonts	4	9	13
Chesham	10	19	29
Great Missenden		15	15
Out Of County	**67**	**43**	**110**
Out Of County	67	43	110
South Bucks District	**37**	**27**	**64**
Beaconsfield		5	5
Beeches	25	19	44
Gerrards Cross	2	1	3
Wexham and Iver	10	2	12
Wycombe District	**46**	**147**	**193**
Chepping Wye Valley	3	5	8
High Wycombe	40	81	121
North West Chilterns		42	42
South West Chilterns and Marlow	3	19	22
Grand Total	**289**	**405**	**694**

The table below shows that there has been a 33% increase in BCC purchasing of OP care home places since 13/14, with the biggest increase in nursing places for both non EMI and EMI.

Table 3: BCC purchasing comparison since 13/14

Care home	13/14 purchase	15/16 purchase	+/- % change
Nursing – non EMI	461	635	+38%
Nursing – EMI	208	289	+39%
Residential – non EMI	319	369	+18%
Residential – EMI	294	405	+38%
Total	1282	1698	+33%

Supply of OP specialised housing

The Care Quality Commission publishes their supply report on the state of CQC registered providers and places across the UK on a quarterly basis and from that, we know that there are 37 nursing homes for OP offering 2,033 places. Of these, 22 are registered for dementia, offering 1,289 places. There are 50 residential homes offering 1,650 places and of these, 32 are registered with CQC for dementia, offering 1,421 places.

As the Bucks OP market is provided by 86 establishments, of those there are 19 homes with under 20 places, 23 with 20-39 places, 18 with 40-59 places, 17 with 60-79 places and nine with 80-120 places.

The table below shows the increasing number of care homes and capacity since 13/14, with the biggest increases in provision of residential EMI places.

Table 4: Number of care homes according to CQC registrations

Care home	No. of homes	+/- % change since 13/14	No of places	+/- % change since 13/14
Nursing	36	+9	2,033	+8%
(Nursing – EMI)	22	+22	1,289	+4%
Residential	50	+11	1,650	+5%
(Residential – EMI)	32	+28	1,421	+34

The next table shows the geographical distribution of care home places in Bucks. It shows the overall OP supply to be a total of 3,608 beds, which is a slight increase since 2014 by 1.4%.

The pattern of nursing for all districts shows an overall decrease by -4.3% since 2014. The biggest decrease is seen in the South Bucks district at -20.1%, followed by Wycombe at -10.7%. The biggest increase in nursing places is seen in the Chiltern district at 29.6%.

For residential places, overall there has been a small increase in places by 5% since 2014. The key decreases are seen in the South Bucks and Wycombe districts by -10.2% and -5.7% respectively. The biggest increases are seen in the Aylesbury district at 25.6%, particularly for the Greater Aylesbury locality which has seen a 82.6% increase since 2014

Table 5: Geographical distribution of OP nursing and residential care home places across Bucks

Care Type	Location	Overall number of places (2013)	Overall number of places (2014)	Overall number of places (2015)
Nursing	**Aylesbury Vale District**	**857**	**917**	**929**
	Buckingham	85	145	205
	Greater Aylesbury	396	396	407
	Haddenham and Long Crendon	110	110	110
	Wendover	266	266	207
	Chiltern District	**148**	**216**	**280**
	The Chalfonts	148	154	218
	Chesham	0	62	62
	South Bucks District	**309**	**279**	**243**
	Beeches	186	186	150
	Gerrards Cross	83	53	53
	Wexham and Ivers	40	40	40
	Wycombe District	**432**	**634**	**566**
	Chepping Wye Valley	145	145	145
	High Wycombe	204	279	204
	North West Chilterns	83	132	132
	South West Chilterns	0	78	85
	Total	**1746**	**2046**	**2018**
Residential	**Aylesbury Vale District**	**322**	**363**	**456**
	Buckingham	23	23	23
	Great Brickhill, Wing & Ivinghoe	103	130	133
	Greater Aylesbury	109	109	199
	Haddenham and Long	35	49	49

	Crendon			
	Wendover	20	20	20
	Winslow	32	32	32
	Chiltern District	**467**	**465**	**508**
	Amersham	161	161	192
	The Chalfonts	50	78	78
	Chesham	80	86	98
	The Missendens	176	140	140
	South Bucks District	**323**	**323**	**290**
	Beaconsfield	153	153	153
	Beeches	83	83	50
	Gerrards Cross	87	87	87
	Wycombe District	**310**	**420**	**396**
	Chepping Wye Valley	22	22	28
	High Wycombe	114	224	194
	North West Chilterns	102	102	102
	South West Chilterns	72	72	72
	Total	**1421**	**1571**	**1650**
	Grand Total	**3167**	**3617**	**3668**

OP care home openings and closures

One new home opened in Aylesbury last year, is registered for residential care and dementia, offering 64 beds. In the same year, four homes offering either residential or nursing were deactivated with CQC. These mainly come from the Wycombe area.

Extra care supply

45 extra care places are commissioned by BCC on block contract. The table below reviews the supply of extra care provision in Buckinghamshire against the national and regional picture. It confirms a varying level of service across the county. The development of the large Anchor Housing scheme, Denham Garden Village distorts the results for the county's extra care provision. Without this facility, the county's extra care provision would be amongst the lowest in the country.

Table 6: Extra care provision in Bucks

	Extra Care provision in Bucks	
	Rate	Rank
Aylesbury Vale	10.7	105
Chiltern	0	284
South Bucks	46	3
Wycombe	1.7	280
Ranking based on 326 authorities		
Rate is the prevalence per 1,000 people aged over 75		

BCC market share

Contrasting BCC purchased care with the rest of the market in Bucks is indicated in the following table:-

Table 7: BCC market share of care home places

Purchaser	Nursing places	% market share	Residential places	% market share	% Total market share
BCC	924	45%	774	47%	46%
Rest of market	1,109	55%	876	53%	54%
Total	2033	100%	1,650	100%	200%

It would seem that the BCC market share at 45% and 47% for nursing and residential care respectively, has increased since 14/15 when its share was 31%, as reported in the last MPS. This has increased due to growth in demand and the increased use of spot places as BCC block places are fully utilised.

Pipeline developments

Planning applications currently in planning pipeline across the county for residential and nursing developments show a potential additional 889 nursing/residential/extra care places over the next two to five years. The next table shows those applications which have either pending or full planning permission from the district councils:-

Table 8: Pipeline developments

Type	District and Local Area	No. of places
Nursing	Wycombe District	75
	Total	**75**
Residential/ Extra care	Aylesbury Vale District	212
	Chiltern District	100
	South Bucks	27
	Wycombe District	475
	Total	**814**
Total		**889**

It is significant to see very little in the pipeline for nursing home development, while there is a large interest in residential care and extra care development, especially for the Wycombe district.

Future need

Population projections

Bucks is increasingly seeing its population getting older, which is higher than the national average. While the increasing longevity of getting older is to be celebrated, it does present significant challenges when the need for Health and Social Care is likely to increase.

According to the latest ONS population projections, Bucks is currently seeing high numbers of OP in Chiltern and South Bucks, and this will increase across the county, particularly for Aylesbury Vale:

Table 9: District % population per age group

	% Of Age Group				
	55-59	60-64	65-69	70-74	75+
Aylesbury Vale	6.2	5.6	5.3	3.7	7.1
Chiltern	6.6	5.9	6.3	4.5	10.0
South Bucks	6.6	5.8	5.9	4.5	10.2
Wycombe	5.8	5.4	5.3	3.9	7.7

Table 10: Population Increase 2013- 2035 75+

Population Increase from 2013 75+					
Area	2015	2020	2025	2030	2035
Buckinghamshire	1.06	1.25	1.52	1.71	1.92
Aylesbury Vale	1.08	1.30	1.67	1.94	2.24
Chiltern	1.03	1.19	1.40	1.51	1.68
South Bucks	1.07	1.22	1.45	1.64	1.84
Wycombe	1.05	1.25	1.49	1.66	1.81

BCC vision for OP housing

It is BCC's vision that:-

In the 2020's the older citizens of Buckinghamshire will have improved housing options, with a better supply, mix and choice of homes. Homes will be of good quality and will be available in individuals preferred neighbourhoods. With access to good support, advice and financing models, an increased number of OP will be attracted to the improved housing offer, and able to take advantage of it.

We know from increasing evidence, as borne out from research, that achieving this vision will help to reduce reliance, prevent or delay the need for Health and Social Care. Improved housing options need to include more alternatives to residential care and BCC has an aspiration to see more provision for 'housing with care' (HwC), i.e. extra and enhanced sheltered housing. 'Housing with Care' is a key driver to reduce residential care placements and allow OP to age in place in the communities they know, which allows them to retain their strong support networks.

Future need

BCC has undertaken research to establish future housing needs for OP in Bucks, for the next 20 years. The rationale was to understand the typology of housing, to meet the needs of an ageing population, and how this could help to reduce reliance or delay/preventing the need for Health and Social Care in the future. The full report can be accessed here: - http://www.buckscc.gov.uk/media/4509015/2016-04-25-housing-lin-bucks-report-final.pdf

The research has identified a significant estimated future need for different housing and accommodation options, to meet the requirements of an ageing population. By 2035, it is estimated that the following is required:

- Housing with care (rented) – additional 692 units
- Housing with care (leasehold) – additional 1711 units
- Leasehold retirement housing – additional 3091 units
- Sheltered housing for rent – a reduction of 952 units
- Nursing care – additional 1833 beds

OP will move to alternative housing if it is of the right quality and meets their aspirations; this is the case for both rented housing and housing for sale. Existing public and private research typically shows quality, design, facilities and location are highly important factors in the decision about whether to move.

Projected housing need by district

The following table shows the projected housing need up to 2025 and 2035. Note that it excludes services in the pipeline and that negative numbers equate to oversupply.

Table 11: housing needs projections

		Projections 2025 & 2035					
Locality	**Year**	**HwC Rent**	**HwC Lease**	**Sheltered rent**	**Lease Retirement Housing**	**Residential**	**Nursing**
Aylesbury Vale	2025	127	530	-182	809	248	236
	2035	202	712	-58	1039	415	604
Chiltern/South Bucks	2025	155	152	-432	721	-52	551
	2035	243	423	-380	868	49	733
Wycombe	2025	150	371	-572	1113	216	349
	2035	247	576	-514	1184	298	497
Buckinghamshire	2025	432	1053	-1186	2643	411	1136
	2035	692	1711	-952	3091	762	1833

A key projection from the table is that there will be an oversupply of sheltered rent accommodation, and it is proposed that these should be considered for conversion to enhanced sheltered or extra care accommodation. More detailed shortfall projections by district, locality and breakdown in 5 year intervals is available in the appendices of the full report.

Housing with Care has traditionally been led by the public sector. Yet future growth is likely to be based mainly in the private leasehold sector as access to public funds is limited, both capital and revenue, and the growth in home ownership in the over 75s continues to rise. Buckinghamshire is well placed to support the growth of leasehold retirement housing with its high capital values.

There is a correlation between the relative affluence of an area, and the likelihood for a leasehold scheme to be developed. Conversely, a high number of Adult Social Care customers who pay no charge for domiciliary care, is likely to encourage public sector rental schemes.

Meeting future housing needs will largely be dependent on the availability of land for new development. The HEDNA, supported by the Local Plans, currently being updated by Aylesbury Vale and High Wycombe District Councils, comment on the shortfall of housing, to meet future demographic growth in the Wycombe and South Bucks districts, while Aylesbury will see a surplus. This means Wycombe and South Bucks will be looking to Aylesbury to meet some of their housing needs. This is likely to have implications for specialised housing too.

Recommendations

Proposals for housing development: 2016 - 2025

Proposals have been developed for discussion with the market, setting out type and allocation of housing, that would help to meet the needs of older people by 2025 as follows:-

Aylesbury Vale

- 150 unit mixed tenure retirement village scheme 50 rental/100 leasehold, most likely in the Aylesbury area;
- Two leasehold housing with care schemes, one high capital value and one downsizer model, in the Wendover or Haddenham localities;
- 2-3 nursing homes are required, with approximately 200 beds, in the Winslow and Buckingham localities;
- Potential for enhanced sheltered schemes in Buckingham, Haddenham and Wendover localities.

Chiltern and South Buckinghamshire

- Mixed tenure retirement village scheme with up to 150 units. 50 rental/100 leasehold. Priority for development in Chesham locality;
- Development of enhanced sheltered schemes across these localities;
- Priority area for nursing care development if land availability allows. Up to 550 beds required.

Wycombe

- Extra care scheme in pipeline will address housing with care rental and leasehold requirements;
- Specialist dementia housing with care unit to support high dependency customers, in the Marlow locality;
- Development of enhanced sheltered units in West Wycombe, North Wycombe and Princes Risborough;
- 3-4 nursing care homes of approximately 350 beds, in the North Wycombe, Princes Risborough, Marlow and High Wycombe localities.

Across all localities, there are substantial opportunities for a range of models from high capital value to downsizer models, reflecting the high projected need for market leasehold retirement housing.

<u>Proposals for housing development: 2025 - 2035</u>

Housing requirements from 2025 to 2035 would depend on the delivery progress made to 2025 and the prevailing market conditions at that time. However, the anticipated key features of proposed development for that period include:-

- At least 1 mixed tenure housing with care retirement village in each District area, at least 500 units in total;
- Housing with care dementia units in all Districts;
- Continuing need for private sector leasehold retirement housing and private sector housing with care schemes;
- Additional nursing home capacity, estimated between 7-10 homes, up to 700 beds, across all Districts.

These requirements have been calculated by the use of The Strategic Housing for OP Analysis Tool (SHOP@) which has been developed by the Housing LIN http://www.housinglin.org.uk/ and EAC (Elderly Accommodation Counsel) http://www.eac.org.uk/. The tool uses a series of nationally available datasets to review potential need against current local service supply.

BCC will be undertaking a range of initiatives to support the development of specialised housing for OP in Bucks. It will work closely with the District Councils, to ensure that OP housing needs are embedded within their Local Plans and to encourage ‘Housing with Care’ developments, including the use of s106 and/or the Community Infrastructure Levy (CIL).

Other initiatives will include ways of realising BCC’s own capital for development, or investment opportunities for Housing with Care schemes, with other partners, e.g. the NHS and interested providers. This will help to address the difficulty of finding available sites for development, given the green belt constraints particularly for the south of the county.

The increase in Housing with Care provision needed will provide significant opportunities for providers. Landlords of extra care schemes will have a greater role in commissioning the care and support services delivered in their schemes, including delivering this service themselves.

Marketing of extra care housing is key to successful delivery, as many OP do not understand what it is. Providers could consider offering an ‘extra care experience’ to potential customers.

The development and marketing of extra care needs to ensure that as well as the need for suitable housing design, it needs to come with the appropriate care and support, tailor made for the tenant. Partnership working between BCC and providers will be key to ensuring the appropriate provision of care and support services within extra care schemes.

Development of social rental schemes should be encouraged, as well as leaseholds, and as this update has shown, Bucks is in a good position to realise this by the prevalence of sheltered accommodation and domiciliary care provision.

4. Learning Disabilities (LD)

BCC purchased placements (August 2016)

BCC purchases approximately 595 places (spot and block) for LD clients, with 175 of those being out of county:

- 10 nursing
- 291 residential
- 294 supported living

BCC’s block purchase consists of 220 places consisting of 52 residential and 168 supported living places.

The following table shows the geographical distribution of LD places (spot and block) across Bucks.

Table 12: BCC purchased LD places across Bucks

District	Nursing	Residential	Supported Living	Grand Total
Aylesbury Vale District	**5**	**79**	**107**	**191**
Buckingham		7	10	17
Great Brickhill, Wing and Ivinghoe		4	14	18
Greater Aylesbury	5	33	75	113
Haddenham and Long Crendon		4		4

Wendover		11		11
Winslow		20	8	28
Chiltern District	**1**	**23**	**33**	**57**
Amersham		12	5	17
Chalfonts	1	1	5	7
Chesham		7	23	30
Great Missenden		3		3
Out Of County	**3**	**129**	**43**	**175**
Out Of County	3	129	43	175
South Bucks District		**11**	**30**	**41**
Beaconsfield			18	18
Beeches		5	5	10
Gerrards Cross		6	7	13
Wycombe District	**1**	**49**	**81**	**131**
Chepping Wye Valley		18	1	19
High Wycombe		24	66	90
North West Chilterns			14	14
South West Chilterns and Marlow	1	7		8
Grand Total	**10**	**291**	**294**	**595**

Supply of LD specialised housing.

Currently in Buckinghamshire, there are six nursing care homes registered for learning disabilities offering 293 places, but all of these are multiple registered for dementia, physical disabilities, and over 65's. In addition, there are a further 43 non-nursing care homes offering 338 places.

This provision includes one non-nursing LD respite establishment of 12 places, and six specialist epilepsy services, five non-nursing care homes and one nursing care home, offering up to 97 places. (Approximately a third of all people with a LD have epilepsy; this is twenty times higher than the general population).

There are around 78 supported living services, with 310 places.

BCC market share

Contrasting BCC purchased nursing and residential care with the supply, we see that BCC's use of LD residential and nursing care accounts for 301 out of 631 places (48%), recognising some of the supply will also be for other care needs and that the figures do not include out of county places. If our 132 out of county nursing and residential places were included, i.e. converted into in county places, BCC's market share would increase to 69%. As there are very few, if any, LD self-funders, it is likely that the remaining capacity of 31% represents voids, clients from other client groups such as PSD, NHS places and clients from other local authorities.

Areas where BCC does not have total market share are quite often in residential care homes, which supports its aim to move clients away from this care type, towards supported living.

The LD care home market has 49 providers with the majority providing up to 10 places in size.

Client and provision purchase growth patterns

Over the last five years, LD services have been fairly static regarding the level of Nursing Care provision purchased, and has significantly decreased its purchasing of residential care provision. In 2016, we can see that supported living places have continued to outnumber residential places purchased from the table below. This is projected to continue.

Table 13: BCC purchase trends for LD places

LD							
Type	**In county**	**09/10**	**10/11**	**11/12**	**12/13**	**13/14**	**15/16**
Nursing	No	5	5	4	3	5	3
	Yes	4	5	5	5	6	7
	Total	**9**	**10**	**9**	**8**	**11**	**10**
Residential	No	203	189	167	147	129	129
	Yes	161	169	168	165	154	162
	Total	**364**	**358**	**335**	**312**	**283**	**291**
Supported Living	No	76	67	77	55	15	43
	Yes	132	143	184	239	275	251
	Total	**207**	**210**	**252**	**287**	**290**	**294**

Since 2009, supported living services have grown by 42%.

Pipeline developments

One care provision, offering 14 places for residential care or supported living, is due to open in late 2016, in Aylesbury. This will be for LD and or, Physical and Sensory Disabilities (PSD). Another care home being proposed, but which is still at planning application stage, will be for 10 residential care and 2 supported living places. This will be for LD with complex needs and Autism and again, this will be located in Aylesbury.

The re-provision of BCC's day centre in High Wycombe will see on the new site, new LD accommodation for residential care and supported living, with 10 and 12 places respectively. Respite accommodation will be offered as well. The new build will be completed in 2018.

Future need and recommendations

Population projections

According to ONS figures, the overall number of people aged 18-64 with LD is projected to decrease by around 4.1% across Buckinghamshire to 2031. However, the numbers with profound and multiple LD are projected to increase to 2031 by 40%. OP (aged 65+) with LD is projected to increase by 55% across Buckinghamshire to 2031 (compared to 49.9% nationally), and by 100% for those with profound and multiple LD aged 65+.

The transition age (14-17) population with severe learning difficulties, is expected to increase by 20 per cent in the next 20 years, and the same age group with PMLD by 100 per cent. This statistic of future increases is among younger and OP with LD, while there will be a decrease in adults with LD, which will lead to a 'generation gap' with significant implications for LD services as will be described later.

Future need

Specialised housing for people with LD will need to continue to grow to meet future need, particularly for OP with LD. It is predicted that in addition to the known pipeline, an additional 8 to 12 supported living units will need to be developed each year until 2035, increasing capacity by around 200 units. Over recent years, BCC have significantly decreased their purchase of LD residential provision and this trend looks set to continue.

Housing in rural areas can represent advantages and disadvantages to LD clients. Urban areas such as Aylesbury and High Wycombe, both of which have large levels of provision of all kinds, offer more opportunity for clients to access community services, facilities and employment.

49 per cent of residential and supported living places in Buckinghamshire are made in Greater Aylesbury and High Wycombe alone. BCC will need to ensure that provision continues to be available in every area of the county, and that BCC has a share in available provision, to avoid clients being placed out of county.

While capacity for supported living accommodation will need to grow, BCC, like many local authorities, are looking to guide LD clients into more independent housing options. As the Mental Health (MH) recommendations below also state, one important way to ensure client independence is to make sure that general housing is able to support the needs of vulnerable adults. Effective support needs to be available to manage rent/tenancies and other housing-related matters, so as to benefit more independent clients, including LD clients, in the future.

Another potential housing option for more independent LD clients is extra care or sheltered housing. This would be for those who can live independently with confidence, but who may need a low level of social care to meet their LD needs. Extra care would allow them the flexibility to call upon social care as and when they needed it, and could represent a stop-gap for transition from supported living to mainstream housing. It is felt that Telecare, Shared Lives and Extra Care could do more to support LD clients.

The LD 'generation gap', as referred to earlier, is already having an effect on LD services in Bucks. Many clients are older, and live in supported living, following transition from long-term hospital care, and voids are created as younger adults do not want to live with them, and vice versa. For younger adults, personal and family expectations are changing as they look for more independent housing, possibly with more activity and socialising.

The previous Market Position Statement established that there will need to be provision for the ageing LD population, and this will need to be not only for new builds, but also existing nursing homes in Buckinghamshire.

The needs that OP have may set in earlier for LD clients; for example, people with Downs Syndrome are vulnerable to early-onset dementia. Some nursing homes outside of the county admit younger clients with learning disabilities for this reason. Some nursing homes will not admit a client with EMI without a diagnosis, but this is an especially difficult process for people with learning disabilities due to co-morbidities and their particular requirements for accessing health services.

5. Autistic Spectrum Disorders (ASC)

Future prevalence of individuals with autistic spectrum conditions (ASC) is projected to decrease by -4.9% between now and 2031, but OP with ASC is expected to increase by 57% over the same duration.
The first generation of people diagnosed with autism in childhood are now reaching middle age and there are also mature adults being diagnosed for the first time. Historically Autism-specific services have tended to concentrate more on the needs of children and younger adults. The challenge we now face is how to extend that reach to older adults. Any development of services will need to take into account the changing, age-related needs of older people.

People on the autistic spectrum can struggle with change and with life skills, which can inhibit their ability to lead independent lives. A study in 2007 found that people with autism are more likely to be in social rented accommodation than the general population; 8% of people with autism in contrast to 4.4% of those without autism. The National Autistic Society (NAS, 2013) has found that 41% of people with autism are living at home with their families and 14% live in their own home with support.

The most severely disabled individuals with autism require around the clock care and specialised accommodation solutions, such as residential care homes. There is clear evidence that some people with autism require accommodation that is specific to their needs which may include a variety of sensory adaptations. However, with the right support and adaptations most properties can be used to meet an individual's accommodation needs.

Establishing accommodation with support for individuals with ASC needs to give consideration to the suitability of urban or rural areas. Accommodation in urban areas is not always suitable for some adults with ASC, who can be exceptionally sensitive to noise levels, and clients with challenging behaviour benefit most from having plenty of space.

Currently in Buckinghamshire there are insufficient appropriate housing options for adults with autism. As a consequence placements are made out of the area. The aim is to develop support and accommodation to meet an individual's needs closer to their family. Specialised provision for autism or challenging behaviour anywhere, would offer opportunity for these clients to return to Buckinghamshire, or for others to avoid an out of county placement.

A new supported living accommodation based service is in the pipeline for the Wycombe district and due to open in 16/17.

6. Mental Health (MH)

BCC purchased places (August 2016)

BCC purchases approximately 308 places (spot and Block) for MH clients, with 66 of those being out of county, as follows:

- 32 extra care
- 62 nursing
- 72 residential
- 142 supported living

BCC have 113 block places for:

- 30 extra care
- 9 residential
- 74 supported living

In addition, BCC currently have nomination agreements with housing providers for 40 places across the county, where clients are supported to live independently.
The following table shows the geographical distribution of MH places (spot and block) across Bucks.

Table 14: BCC purchased MH places across Bucks

District	Extra Care	Nursing	Residential	Supported Living	Grand Total
Aylesbury Vale District	**30**	**21**	**12**	**54**	**117**
Buckingham		1	1		2
Great Brickhill, Wing and Ivinghoe			2		2
Greater Aylesbury	30	13	7	54	104
Wendover		7			7
Winslow			2		2
Chiltern District			**10**	**14**	**24**
Amersham			5	14	19
Chesham			2		2
Great Missenden			3		3
Out Of County	**2**	**26**	**18**	**20**	**66**
Out Of County	2	26	18	20	66
South Bucks District		**2**	**2**	**5**	**9**
Beeches			2	5	7
Wexham and Ivers		2			2
Wycombe District		**13**	**30**	**49**	**92**
Chepping Wye Valley		1	2		3
High Wycombe		12	19	18	49
North West Chilterns			8	24	32
South West Chilterns and Marlow			1	7	8
Grand Total	**32**	**62**	**72**	**142**	**308**

Supply of MH specialised housing

Non-nursing residential care for MH clients is very limited within Bucks, following a decision by NHS Trust and service providers, to focus more on supported living services development. One non-nursing home is registered on CQC, providing nine places.

There are an additional six non-nursing homes registered for MH, but all of these are multiple registered for dementia, learning disabilities, physical disabilities, dementia and over 65’s.

Similarly, there are four nursing care homes which are registered for MH, and all of these are multiple registered for dementia, learning disabilities, physical disabilities, dementia and over 65’s.

There is one extra care service currently being provided for MH clients (55+years old) in Buckinghamshire, which has 30 spaces filled by BCC clients, 12 of whom are OP as demonstrated above. There are also older MH clients in the four OP’s Extra Care homes.

BCC market share

Currently, BCC hold block contracts for all residential MH places in the county, of which there are eight; additional supply being spot purchased out of county, or in non-specialist environments in county.

Client and provision purchase growth patterns

Over the last six years, MH services have shown a largely static purchase of nursing provision, a reduction in residential purchase and an increase in supported living and extra care, as the following table shows:-

Table 15: BCC purchase trends for MH places

MH							
Type	**In county**	**09/10**	**10/11**	**11/12**	**12/13**	**13/14**	**15/16**
Nursing	No	10	10	6	6	5	26
	Yes	0	0	3	3	2	36
	Total	**10**	**10**	**9**	**9**	**7**	**62**
Residential	No	41	46	19	15	16	18
	Yes	5	6	14	15	14	54
	Total	**46**	**52**	**33**	**30**	**30**	**72**
Supported living	No	23	17	18	7	8	20
	Yes	14	16	37	57	81	122
	Total	**37**	**33**	**55**	**64**	**89**	**142**
Extra Care	No						2
	Yes	0	0	16	30	30	30
	Total	**0**	**0**	**16**	**30**	**30**	**32**
Total		**93**	**95**	**113**	**128**	**145**	**308**

Those with high/very high MH concerns who are provided with specialist accommodation support are few. Currently, specialised accommodation supports 284 people out of the potential 9,990. This number is not expected to grow significantly by 2033.

Pipeline developments

A 6 bedroom property in Burnham will be offered for MH supported living accommodation from end of October 2016.

12 flats in Aylesbury are being re-developed into supported living accommodation for MH use. These will be available for spot purchase later in 2016.

Work is underway to move 18 MH placements, currently in supported living accommodation for higher needs, into step down accommodation, which is again, supported living, but for lower level needs. This will free up capacity for supported living accommodation for higher level needs.

Future need and recommendations

Population projections

According to ONS figures, the overall number of people with MH concerns, aged 18 and over is projected to increase between 2.5% and 3% by 2030. It can be assumed that the local demographics and levels of MH need in Buckinghamshire approximately reflect the national England average, indicating a slight increase in need over the period from 2015 to 2030.

Future need

The original Market Position Statement (2014) stated that an additional eight accommodation units would be needed in the following two years. This target has been achieved and with further supported living accommodation having been developed. There is currently no shortfall in capacity to meet current and future needs.

There are currently no additional planning applications for specialised MH accommodation. However, since the current predicted need is for an additional eight units every five to six years, we cannot yet consider ourselves behind target, but should not be complacent as developments can take a number of years to come to fruition.

BCC's service delivery agenda is to ensure that people have access to a whole range of mainstream community services, which include the development of high quality accommodation and support in people's homes. Specialised housing placements are often made with a view to the client eventually transitioning to 'move on' accommodation, i.e. supported general housing and mainstream community services. This is further supported by the gradual decline in residential MH places, and corresponding increase in supported living and extra care. MH clients have also, in some cases, integrated well into shared accommodation with LD clients, which allows a certain amount of flexibility around these provisions.

Developing 'move on' accommodation to fully meet the housing needs of MH clients is a key priority for BCC, working in partnership with the District Councils and providers, thereby freeing up capacity in higher needs supported living accommodation.

Another key priority is to reduce the number of out of county places, currently 26. Given that these places are often made to be temporary, the best direction to take will be to make sure that general housing and mainstream services are prepared and available for these clients to potentially return to Buckinghamshire. This will involve liaison with the district councils and social housing providers to make sure housing provision is available which suits the needs of clients with MH problems.

Extra care is an increasing priority to meet the needs of older MH clients, as there will be a 10 per cent increase in OP with psychosis in the next twenty years. Extra care has proven to be very successful in meeting the needs of this care group.

7. Physical and Sensory Disabilities (PSD)

This relates to clients with SD under the age of 65 years. As a lot of people develop PSD in their old age, they are likely to have a different Primary Support Reason, e.g. personal care support

BCC purchased places (August 2016)

BCC has no block contracts for PSD places and purchases on spot instead.

BCC purchases approximately 225 places, with 63 of these as out of county:

- 41 nursing
- 94 residential
- 90 supported living

The following table shows the geographical distribution of PSD places (spot and block) across Bucks

Table 16: BCC purchased PSD places across Bucks

District	Nursing	Residential	Supported Living	Total
Aylesbury Vale District	**19**	**25**	**27**	**71**
Buckingham		1		1
Great Brickhill, Wing and Ivinghoe		2	6	8
Greater Aylesbury	15	18	18	51
Waddesdon			1	1
Wendover	4	3		7
Winslow		1	2	3
Chiltern District	**5**	**15**	**9**	**29**
Amersham		2	4	6
Chalfonts	5	5	2	12
Chesham		6	3	9
Great Missenden		2		2
Out Of County	**8**	**38**	**17**	**63**
Out Of County	8	38	17	63
South Bucks District	**2**	**7**	**7**	**16**
Beaconsfield			4	4
Gerrards Cross	2	7	3	12
Wycombe District	**7**	**9**	**30**	**46**
Chepping Wye Valley	1		1	2
High Wycombe	5	7	26	38
North West Chilterns		1	3	4
South West Chilterns and Marlow	1	1		2
Grand Total	**41**	**94**	**90**	**225**

Supply of PSD specialised housing

There are 17 non-nursing care homes with 173 places in Bucks being offered for PSD clients, although 13 of these places are also registered for LD. The homes include a specialist care home without nursing for 22 acquired brain injury (ABI) clients and four specialist epilepsy services.

There are 2 nursing care homes offering up to 42 places, although one is also registered for LD.

Finally, there are 4 supported living services and these are shared LD clients.

BCC market share

BCC AFW currently spot purchases for clients from around 40 different service providers.

Client and provision purchase growth patterns

The following table shows increases in places across nursing, residential and supported living, but the biggest increases are in supported living services, reflecting a strategic move away from residential care settings and a move towards supported living. This is likely to continue.

Table 17: BCC purchase trends for PSD places

Provision Type	In County	09/10	10/11	11/12	12/13	13/14	15/16
Nursing	No	18	19	11	12	8	8
	Yes	14	11	19	17	18	33
	Total	**32**	**30**	**30**	**29**	**26**	**41**
Residential	No	31	30	26	25	23	38
	Yes	32	32	33	34	36	56
	Total	**63**	**62**	**59**	**59**	**59**	**94**
Supported Living	No	1	1	5	2	5	17
	Yes	0	0	1	5	12	73
	Total	**1**	**1**	**6**	**7**	**17**	**90**
Total		**96**	**95**	**95**	**95**	**103**	**225**

Pipeline developments

As reported under the LD section, one care provision offering 14 places for residential care or supported living is due to open late 2016 in Aylesbury.

There will be an additional supported living provider offering 22 places in Aylesbury, which is going through deregistration from residential care.

Future needs and recommendations

Population projections

According to ONS figures, people with a moderate or serious physical disability are projected to increase by 3% (893) by 2030. Over the same period, adults aged 18 and over with a hearing impairment and visual impairment, will increase by 48% (24,690) and 54% (4,390) respectively.

Future need

The original MPS predicted that six units every five to six years will need to be developed for PSD clients, providing an additional 20 units by 2035. It would seem that the care provision due to open late 2016, offering 14 places, would substantially cover this need.

Our future direction for specialised accommodation for PSD is likely to involve more integration with supported living provision for LD, as many PSD clients will have cognitive disabilities or co-morbid conditions.

We will continue to support the development of supported living services as an alternative to residential care, and to reduce the number of out of county placements. There is probably a disproportionate number of PSD places in residential care, and these need to be reviewed as possible candidates for supported living accommodation.

We see equipment, including assistive technology and adaptations, increasingly critical to support PSD clients to live independently, especially where they do not have additional disabilities. Likewise for MH, we will be working with District Councils and providers to support transition of PSD clients, where possible, into step down accommodation, supported by use of equipment and technology, as well as lower levels of support.

Home adaptations have an important role in supporting PSD clients to remain independent and living in their own homes. This will also avoid the cost and resource required in dismantling the adaptation and putting the home back on the market as a general needs home. An Adapted Housing Register detailing the provision and whereabouts of accommodation could maximise resources and target/protect already adapted housing stock for use by PSD clients. This will be taken up with the District Councils as an area of discussion.