Supply and demand gap analysis for Care Homes and Extra Care in the wider context of older people's accommodation and care.

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1. PURPOSE:

1.1 To provide an estimate of forecast demand by locality and compare this to the existing provision of extra care housing and care homes. To highlight the known developments of extra care housing and care homes and consider the likely gaps in provision by locality.

2. STRATEGIC CONTEXT

2.1 The current Government produced a national housing strategy, *Laying the Foundations: a housing strategy for England.* (2011)[1] which includes references to a 'new deal for older people's housing' that promises a better offer to help older people remain independent and encourages the development of extra care housing. In addition, the *National Strategy for Housing in an Ageing Society*[2] - *Lifetime Homes, Lifetime Neighbourhoods*, sets out a wide range of objectives in relation to broadening the range of housing, care and support options and opportunities available to people as they become older and/or experience disability. It also recognises that good housing is critical to manage the mounting

[1] Laying the Foundations: a housing strategy. Department of Communities and Local Government, Nov 2011
[2] 1 National Strategy for Housing in an Ageing Society: Lifetime Homes, Lifetime Neighbourhoods. CLG, 2008

pressures of care and support expenditure, and envisages making it easier and safer for older people to stay in their own homes.

2.2 A review of relevant influential publications undertaken in the review of specialist accommodation needs suggest that the following strategic approaches are important:

- An emphasis on extending the range of choice.
- A shift away from more institutional provision in favour of supporting people to be independent.
- Giving people greater direct control over their life and how they are supported most recently manifest in the concept of ‘personal budgets’ for social care.

2.3 Local strategies, recognising the increased demand for suitable accommodation for older people, promote the development of extra care housing in all areas of Central Bedfordshire and for institutional care facilities to focus on supporting people with the most complex needs.

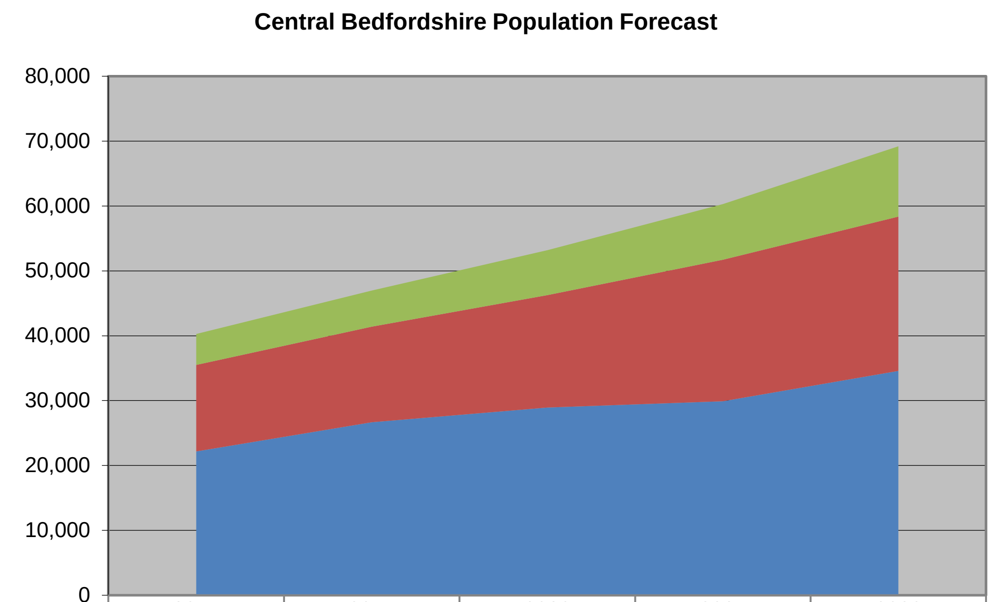
2.4 Increasing the level of independence for older people is supported by a number of initiatives, including reablement and a focus on prevention. The availability of a range of housing with care solutions will provide varied opportunities for older people to maintain independence as their care needs develop with age.

2.5 The rising population of older people will result in an overall increase in demand for all types of supported accommodation including both extra care and care homes. It has already been recognised that the current stock of council owned care homes are nearing the end of their economic life and developing new care home provision will be key to ensuring continued choice and sustained quality of provision.

2.6 The Meeting the Accommodation Needs of Older People Programme (MANOP) will provide the lead for the development of appropriate levels of extra care housing and care home provision across Central Bedfordshire. This document sets out the current estimated demand for these provisions in the context of the wider range of accommodation for older people.

3. DEMOGRAPHIC CONTEXT

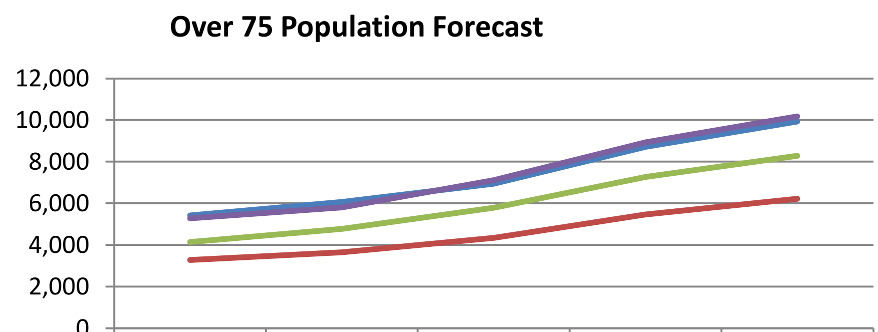
3.1 The overall population of Central Bedfordshire is expected to rise by less than 10% by 2020 and by less than 15% by 2030. By contrast the population of people over age 65 is expected to rise by more than 30% by 2020 and by more than 55% by 2030. For those people over age 75 the rise is more striking at 43% by 2020 and 91% by 2030 and for people over the age 85 the rise is expected to reach almost 130% on current levels by 2030.



	2011	2015	2020	2025	2030
85+	4,770	5,570	6,930	8,580	10,840
75-84	13,340	14,740	17,330	21,820	23,790
65-74	22,160	26,660	28,930	29,900	34,580

3.2 The total population of older people has been considered in relation to four localities that are coterminous with the Bedfordshire PCT commissioning areas in Central Bedfordshire. These are: Chiltern Vale, covering Dunstable, Houghton Regis and surrounding areas; Leighton Buzzard; West Mid Beds, covering Ampthill, Flitwick and includes Marston Moretaine and Cranfield; and Ivel Valley, covering Biggleswade, Sandy and Shefford areas.

3.3 Ward level population forecasts have been provided by Customer Insight to 2020 and these have been used to produce locality level population figures for people aged over 65 and over 75. Forecasts for 2025 and 2030 for each area has been based on the overall Central Bedfordshire population increase and applied to the individual wards.



	2011	2015	2020	2025	2030
Chiltern Vale	5,415	6,070	6,935	8,718	9,934
Leighton Buzzard	3,270	3,645	4,345	5,463	6,224
West Mid Beds	4,145	4,765	5,780	7,267	8,279
Ivel Valley	5,280	5,800	7,105	8,934	10,180

3.4 The greatest overall increase to 2030 is seen in West Mid Beds with almost 100% rise in the population of people over 75 by 2030 against an overall rise of 91% across all areas. In contrast the population of people over 75 in Chiltern Vale is expected to grow by 83.5% in the same period. Over the shorter term, by 2020 the population of people over 75 is expected to grow by almost 40% in West Mid Beds and 28% in Chiltern Vale. This suggests a need to consider stimulating additional provision in West Mid Beds, an area already showing a shortfall in supply.

3.5 An analysis of the property tenure for people over 65 was undertaken using the 'Tenure by Household Composition' (data from the 2011 Census). This data suggests that just less than 1/3 of people over the age of 65 live alone (11,724 households). The remaining population of people over the age of 65 either live with other people over the age 65 ,(20,798 households) or in households with people under the age 65 (7,798 households). This might point to a need for greater numbers of two bedroom extra care units however does not take into account the relative propensity for couples to move to new accommodation.

3.6 The Tenure by Household Composition data also suggests that, for those households occupied only by people over the age of 65[3], 76% live in a home they own. A further 17% live in a socially rented home and 3.6% live in a privately rented home. 2.5% households are rent free and only 0.3% (55 households) are recorded as shared ownership.

A breakdown of tenure for those households occupied only by people over 65 for each locality is shown below.

	Chiltern Vale	**Ivel Valley**	**Leighton Buzzard**	**West Mid Beds**
Owned: Total	78.2%	74.2%	78.1%	76.9%
Shared ownership (part owned and part rented)	0.3%	0.3%	0.2%	0.2%
Social rented: Total	16.5%	18.7%	15.7%	16.4%
Private rented: Total	3.0%	3.9%	3.3%	4.0%
Living rent free	2.0%	2.9%	2.6%	2.6%

3.7 A series of focus groups held in 2012 found that 83% of attendees were owner occupiers and stated that they would not be willing to change their housing tenure if they moved. This suggests that a high proportion of people would prefer to retain ownership of their property and that the benefits of shared ownership may need to be communicated effectively to encourage take up of this form of occupancy.

[3] The dataset did not provide tenure information at an individual level for multi-occupancy properties.

4. DEMAND AND SUPPLY

Affordable Extra Care

4.1 There are currently a total of 149 affordable housing units classified as Extra Care in Central Bedfordshire. There are 4 facilities of 33 or 34 units, one in each locality plus one other in Chiltern Vale providing 16 units. However these facilities do not meet with the current vision for extra care since they offer a minimal of communal facilities and are of limited capacity.

4.2 The More Choice, Greater Voice forecast model has been used as the baseline model for predicting demand. This model suggests an area should provide 25 extra care places for every 1000 people over 75. The current supply of Central Bedfordshire provides for only 8.3 places per 1000. To meet the volume suggested by the model an additional 300 places would be required across Central Bedfordshire. The model does not make a distinction between affordable housing and market rates housing.

Forecast Demand for Extra Care Places

	2011	2015	2020	2025	2030
Chiltern Vale	134	151	173	217	247
Leighton Buzzard	80	91	107	136	155
West Mid Beds	103	118	143	180	206
Ivel Valley	131	144	177	222	253
Total	**448**	**504**	**600**	**755**	**861**

Based on 25 extra care places per 1000 people over 75 as per More Choice, Greater Voice model

4.3 There are a number of extra care developments planned that will increase the supply over the coming years. By 2015/16 a further 165 units of accommodation are expected to be available, 83 in Dunstable (Priory View) and 82 in Leighton Buzzard (Greenfields). By 2020 it is expected that there will be a further development in Chiltern Vale providing 160 units (Houghton Regis), a development in West Mid Beds providing 80 units and a development in Biggleswade providing 90 units.

4.4 These developments are forecast to increase the supply to 314 by 2015/16 and 639 by 2020. In 2020, with these planned developments, Central Bedfordshire will be providing for 26.4 places per 1000, which will be 33 places above the recommended number suggested by More Choice, Greater Voice. The provision is not equitably spread across the four localities since the majority of development is in the south of the area. The Council therefore has declared an aspiration to develop one more scheme with a significant affordable element in an area of high demand by 2020.

<u>**Forecast Supply of Extra Care Places**</u>

	2011	2015	2020	2025	2030
Chiltern Vale	49	132	264	264	264
Shortfall (-Excess)	85	19	-91	-47	-17
Leighton Buzzard	33	115	115	115	115
Shortfall (-Excess)	47	-24	-8	21	40
West Mid Beds	33	33	113	113	113
Shortfall (-Excess)	70	85	30	67	93
Ivel Valley	34	34	119	119	119
Shortfall (-Excess)	97	110	58	103	134
Total	149	314	611	611	611
Shortfall (-Excess)	299	190	-11	144	250

Based on 25 extra care places per 1000 people over 75 as per More Choice, Greater Voice model

4.5 It will be important to continue to stimulate growth if the supply is to keep pace with the demand from an increasing older population. Beyond 2020 the demand for extra care can be expected to continue to rise and it will be important to maintain the momentum of market development. It will also be important to stimulate further market interest in developments in the West Mid Beds and Ivel Valley localities.

4.6 There is growing evidence that this model for extra care whilst useful in determining the minimum level of supply, does not quantify overall demand, and that there is considerable additional demand so long as the extra care 'offer' meets the aspirations of its potential customers. Indeed it is reasonable to suppose that an 'excess' of extra care (above the minimum predicted by the model) is positive – as it can lead to people with lower care needs taking up places in extra care, adding to the vibrancy of schemes.

Care Homes

4.7 Developers and care providers are increasingly seeking to provide care home facilities that can deliver nursing and personal care under one roof. Also, whilst it is possible to distinguish between residential care homes and care homes with nursing in the existing supply market, future planning applications do not differentiate between residential and nursing and so it is impossible to determine the relative balance of future supply. The future care home supply analysis has therefore looked at the combined provision of residential and nursing homes and compared this to demand.

4.8 In 2011 there were 1,280 care home places available in Central Bedfordshire. In 2014 this had reduced to 1214 of which 664 are residential homes and 550[4] are nursing homes. There are a total of 20 residential care homes and 12 nursing homes however these are not spread equitably across the localities. Chiltern Vale has a total of 11 residential care homes providing 371 places whilst the other localities have between 1 (West Mid Beds) and 4. Ivel Valley, however, has 5 nursing homes providing a total of 190 places whilst the other localities have 2 or 3 homes each.

Current Supply of Care Home Places

	Chiltern Vale	Leighto n Buzzard	West Mid Beds	Ivel Valley	**Total**
Population Over 75 (2011)	5,415	3,270	4,145	5,280	**18,110**

Care Homes catering for 65+	11	4	1	4	**20**
Number of Care Home places for 65+	371	134	30	129	**664**
Places per 1000 people over 75	69	41	7	24	**36.7**
Number of Care Homes with Nursing catering for 65+	2	3	2	5	**12**
Number of Care Homes with Nursing places for 65+	74	199	87	190	**550**
Places per 1000 people over 75	14	61	21	36	**30.4**
Nursing & Residential Homes	**445**	**333**	**117**	**319**	**1214**
Places per 1000 people over 75	**82**	**102**	**28**	**60**	**67.0**

4.9 According to the More Choice, Greater Voice forecast model an area should provide 65 residential care home places and 45 nursing care home places per 1000 people over 75. Currently[5] Central Bedfordshire provides for 36.7 residential care home places per 1000 and 30.4 nursing care home places per 1000. This represents a shortfall, according to the model, of 513 residential care home places and 264 nursing care home places.

4.10 Whilst there are occasional difficulties finding places for people in care home services close to home the operational team do not feel there are significant shortfalls in provision overall at an area level. A survey conducted across all care homes in 2012 revealed that vacant beds accounted for 17% across all independent residential care homes, 9% across the council-owned homes and 9% across nursing homes. Early indications from a recent survey in 2014 on bed occupancy levels suggests the overall rate has increased slightly to 84% This suggests that the current level of provision is neither causing an excess nor deficit in provision. The inequitable

[4] This reflects a closure of a small residential care home in Chiltern Vale and a reduction in the number of beds available in a nursing home in Ivel Valley.
[5] Based on 2011 population figures

supply across the four areas of Central Bedfordshire must, however, be recognised and market stimulation focused on those areas with the greatest need.

4.11 There is a strategic intention to move away from institutional care and for care home services to focus on supporting people with more complex needs and severe levels of dementia. The More Choice, Greater Voice forecast assumptions of 65 places per 1000 for residential care and 45 places per 1000 for nursing care could therefore be seen as excessive, given the current balance of demand and supply in the area. For the purposes of this analysis the current level of provision per 1000 people over 75 has been used as a starting point for estimating future demand across Central Bedfordshire as a whole and for each locality.

4.12 The planned development of extra care homes will provide more choice to people that require increasing levels of personal care. Such choice might be expected to reduce the demand for residential care. It is not, however, expected to have an impact on the demand for nursing care provision. An analysis of placements into residential care homes during 2012-13 suggested that 26% of people placed into a residential care home might have been suitable for extra care. The availability of extra care may also prompt people to choose this type of accommodation before a crisis situation stimulates a need for a care home placement. This effect would suggest the demand for residential care would fall as the availability of extra care increases.

4.13 If it is assumed that between 26% and 30% of people currently taking a place in a residential care home were instead to take up extra care then this would reduce the number of places per 1000 people over 75 from 37.2 to between 26 and 27.5. Since the availability of extra care is not expected to approach desired levels until 2020 the reduction in residential demand would not be achieved until this time. To reflect this gradual reduction the demand model has estimated a residential care home need for 34 places per 1000 for 2015 and 27 for 2020 and beyond. The table below shows the planning assumptions used to forecast the residential and nursing care home demand.

Residential and Nursing places per 100 people over 75 – Planning Assumptions

	2011	2015	2020	2025	2030
Residential Care	37.2	34	27	27	27
Nursing Care	33.5	33.5	33.5	33.5	33.5

4.14 If these planning assumptions are used in the model the demand for residential care home places across Central Bedfordshire could be expected to fall to about 650 by 2020 whilst the demand for nursing home places would rise to 809. The overall demand is shown in the table below.

Estimated Demand for Care Home places

	2011	2015	2020	2025	2030
Population over 75	18,110	20,280	24,165	30,382	34,617
Residential Demand	673	689	652	820	934
Nursing Demand	606	679	809	1017	1159
Total Care Home Demand	**1279**	**1368**	**1461**	**1837**	**2093**

4.15 There are a number of care home developments that will increase the supply over the coming years. By 2015 a further 204 places are anticipated, two in Dunstable for 75 and 66 places and another in Ampthill for 63 places. By 2020 it is expected that a further 195 places may become available, all in the Ivel Valley area (Stotfold - 75, Shefford - 60 and Biggleswade - 60).

4.16 As replacement capacity becomes available it is planned that the council-owned care homes will be decommissioned as they are approaching the end of their economic life and no longer meet Care Quality Commission standards. This will remove 249 care home places from the available supply between 2015 and 2020.

4.17 Taken together the anticipated developments will increase the overall care home supply to 1,364 by 2020. If no new care homes (apart from those already planned or commenced) came forward in the meantime then supply is would fall short of demand by almost 100 places. Using the same assumptions, by 2025 this shortfall is would rise to 475 places, reaching a deficit of over 700 places by 2030. It will therefore be important to continue to stimulate the market to provide care home services into the future, both to meet the needs of the rising older population and to allow the existing Council-owned care homes to be replaced by more modern facilities.

Estimated Care Home Demand and Supply Forecast

	2011	2015	2020	2025	2030
Population over 75	18,110	20,280	24,165	30,382	34,617
Care Home Demand*	1279	1368	1461	1837	2093
Care Home Supply	1214	1418	1364	1364	1364
Excess (Deficit)	(-65)	50	(-97)	(-473)	(-729)
Places per 1000 over 75	67.0	69.9	56.4	44.9	39.4

*Note: based on places per 1000 of 37.6 for Residential and 33.8 for Nursing

Summary

4.18 With the planned expansion of extra care housing and the known care home proposals Central Bedfordshire can expect to see an overall increase in the level of accommodation with care to 2020 of an additional 640 places (490 extra care and 150 care home places). During the same period the population of people over 75 will have increased by 6,094 (34%). Whilst the drive to increase the provision of extra care will be key to shifting the balance away from institutional care, additional care home services will need to be developed if overall shortfalls in provision are to be avoided. The table at Appendix 1 shows the breakdown of forecast supply and demand across all areas.

5. LOCALITY ANALYSIS

5.1 The supply of services across the localities differs widely, particularly for care homes, and the level of interest in future development also varies. The relative market share of the council owned care homes will also have a varied impact on the supply of residential care across the area. For these reasons a high level review of the provision in each locality has been undertaken.

5.2 The same profile of places per 1000 people over 75 has been used to model each area as has been applied to Central Bedfordshire as a whole. This profile is shown in the table below.

	2011	2015	2020	2025	2030
Residential Care	37.2	34	27	27	27
Nursing Care	33.5	33.5	33.5	33.5	33.5
Extra Care	25	25	25	25	25

Chiltern Vale

5.3 Chiltern Vale includes Dunstable, Houghton Regis and surrounding areas and accounts for 29% of the over 75 population. It has three parishes where over 30% of households contain only residents over 60 (Whipsnade, Stuham and Caddington) and two areas in Dunstable where the Income Deprivation Affecting Older People Index (IDAOPI) ranks below 20% nationally. The majority of the more rural areas within the locality, however, rank above the 60% IDAOPI nationally.

5.4 Currently there are developments with planning applications for 2 care homes, proposing 141 places, and 2 extra care developments, proposing 243 places by 2020. There are two Council owned care homes in the area each providing a total of 42 places. This additional provision coupled with the anticipated reduction in existing supply would deliver a total of 794 places by 2020 (502 care home places and 292 extra care). Based on the planning assumptions set out above the supply would provide an overall excess of 202 places (83 care home and 119 extra care). The table below illustrates this position.

	2011	2015	2020	2025	2030
Care Home Demand	382	409	419	527	600
Extra Care Demand	134	151	173	217	247
Total Care Based Demand	516	560	592	744	847
Care Home Supply	445	586	502	502	502
Extra Care Supply	49	132	292	292	292
Total Care Based Supply	494	718	794	794	794
Total Excess (Deficit)	**(-22)**	**158**	**202**	**50**	**(-53)**
Care Home Excess (Deficit)	63	177	83	(-25)	(-98)
Extra Care Excess (Deficit)	(-85)	(-19)	119	75	45

5.5 McCarthy & Stone have completed 32 1 and 2 bedroom retirement living apartments units at Elliot Court in Dunstable. There are also a number of other potential development sites in the locality including Brewers Hill Road in Dunstable and another site in Toddington.

5.6 This suggests that this locality is able to meet the demands of the local population until 2020 and cater for the withdrawal of the council owned care home services within the same timescale. Looking beyond to 2030 the forecast suggests that the supply of extra care would meet and exceed demand by about 54 places. There would, however, be a need for almost 100 more care home places to meet the forecast need.

Leighton Buzzard

5.7 Leighton Buzzard includes Leighton Buzzard, Linslade, Eaton Bray and Heath and Reach wards and accounts for 18% of the over 75 population. The locality has one area, Stanbridge, where over 30% of households contain only people over 65. There are no lower super output areas however parts of the two Leighton Buzzard wards have areas that fall within the 20-40% most deprived IDAOPI areas.

5.8 Aldwyck Housing Association has commenced work on an affordable extra care development, Greenfields, expected to provide 81 units. Currently there is a planning consent for one care home on the former Miller's Dairy site however this has not progressed for a number of years and so has not been included in the forecast supply estimate. There is one Council-owned home in the area providing 30 places.

5.9 The additional provision coupled with the existing supply of 333 care home places and 33 extra care units would deliver a total of

418 places by 2020 (303 care home places and 115 extra care places). Based on the planning assumptions this would provide an excess of 49 places overall (41 care home places and 8 extra care). The table below illustrates this position.

	2011	2015	2020	2025	2030
Care Home Demand	230	245	262	330	376
Extra Care Demand	80	91	107	136	155
Total Care Based Demand	310	336	369	466	531
Care Home Supply	333	333	303	303	303
Extra Care Supply	33	115	115	115	115
Total Care Based Supply	366	448	418	418	418
Total Excess (Deficit)	**56**	**112**	**49**	**(-48)**	**(-113)**
Care Home Excess (Deficit)	103	88	41	(-27)	(-73)
Extra Care Excess (Deficit)	(-47)	24	8	(-21)	(-40)

5.10 McCarthy and Stone have commenced construction of 30 later living apartments in the centre of Leighton Buzzard with an estimated completion date of September 2015. Redevelopment of the Town Centre may also yield opportunities in the next 5 years and development on Land East of Leighton Buzzard would offer further opportunities beyond 2020.

5.11 Like the Chiltern Vale area, Leighton Buzzard would appear to provide sufficient capacity to meet demand by 2020 however by 2030 the pressure for more provision will become evident.

West Mid Beds

5.12 West Mid Beds comprises 8 wards stretching from Aspley Heath to Shillington and from Barton to Houghton Conquest. It accounts for 23% of the over 75 population with one area, Aspley Heath, where over 30% of households contain people over 65. Woburn, Aspley Guise, Ampthill, Haynes and Clophill are parishes where over 25% of households contain people over 65. It has two areas that fall within the 20-40% most deprived IDAOPI rankings, in Marston Moretaine and Flitwick.

5.13 Currently there is a development underway of one care home in Ampthill providing 63 places and plans to develop Houghton Lodge to provide 80 extra care places by 2020. There is only one Council owned care home in the area providing a total of 30 places. Coupled with the existing provision this would deliver a total of 263 places by 2020 (150 care home places and 113 extra care). Masterplanning for development land at Marston Moretaine may also yield a care home as part of the plan.

5.14 The approved additional supply will not provide sufficient capacity to meet the demand generated by the population of people over 75. To reach the levels of supply suggested by the planning assumptions an additional 199 care home places and 30 extra care places would be needed in this locality by 2020. This is illustrated in the table below.

	2011	2015	2020	2025	2030
Care Home Demand	292	321	349	439	500
Extra Care Demand	103	118	143	180	206
Total Care Based Demand	395	439	492	619	706
Care Home Supply	117	180	150	150	150
Extra Care Supply	33	33	113	113	113
Total Care Based Supply	150	213	263	263	263
Total Excess (Deficit)	**(-245)**	**(-226)**	**(-229)**	**(-356)**	**(-443)**
Care Home Excess (Deficit)	(-175)	(-141)	(-199)	(-289)	(-350)
Extra Care Excess (Deficit)	(-70)	(-85)	(-30)	(-67)	(-93)

5.15 The anticipated deficit by 2030 is even more significant with an additional 443 places being required to meet demand, the equivalent of about 6 facilities offering 75 places. This is mainly due to the current shortfall in supply but also due to the anticipated increase in the older population, which is more significant than in other areas. Given the current shortfall of care home provision in this locality it will be challenging to support the transition away from council owned provision by 2020 unless additional capacity is forthcoming.

Ivel Valley

5.16 Ivel Valley covers 8 wards and includes Shefford, Biggleswade, Sandy and Arlesley. It accounts for 30% of the total population of people over 75 with higher percentages of older people in Northhill, Moggerhanger, Blunham and Sutton. It has one area in Sandy in the most deprived IDAOPI ranking and a further two, one in Arlesley and one in Biggleswade, ranked in the 20-40% range.

5.17 Currently there are potential care home developments in Stotfold (75 places), Shefford (60 places) and Biggleswade (60 places). However only the site in Biggleswade has planning consent. In addition there is an opportunity to develop a further site in Biggleswade to provide 85 extra care places. The area has three Council-owned care homes providing a total of 105 places. Coupled with the existing provision this would show a total supply of 528 places by 2020 (409 care home places and 119 extra care places). This is illustrated in the table below.

	2011	2015	2020	2025	2030
Care Home Demand	372	391	429	540	615
Extra Care Demand	131	144	177	222	253
Total Care Based Demand	503	535	606	762	868
Care Home Supply	319	319	409	409	409
Extra Care Supply	34	34	119	119	119
Total Care Based Supply	353	353	528	528	528
Total Excess (Deficit)	**(-150)**	**(-182)**	**(-78)**	**(-234)**	**(-340)**
Care Home Excess (Deficit)	(-53)	(-72)	(-20)	(-131)	(-206)
Extra Care Excess (Deficit)	(-97)	(-110)	(-58)	(-103)	(-134)

5.18 The additional capacity will not provide sufficient supply to meet the demand suggested by the planning assumptions. In total there would be a shortfall of 78 places by 2020 (20 care home and 58 extra care). This suggests that, unless addition market supply is forthcoming, it will prove difficult to decommission all three existing Council owned care homes within the planned timescales.

Summary

5.19 By 2030 the rise in population is expected to generate an overall demand for nearly 2100 care home places and over 860 extra care places. Against the level of anticipated supply, assuming those planned for come to fruition and the successful decommissioning of the Council owned homes, an additional 730 care home places and 225 extra care homes will be needed. The current level of aggressive development and market stimulation will therefore need to be sustained if this level of demand is to be met.

5.20 It is clear from the analysis of the localities that the efforts to stimulate additional provision should be focused on the North of Central Bedfordshire. It also suggests that additional attention should be paid to providing care home services over the short term if we are to be able to maintain the current balance of supply and demand and achieve a move away from the current council owned stock in the north of Central Bedfordshire.

5.21 Whilst this analysis has considered forecast need for care homes in general, some mention of the balance of residential and nursing supply currently experienced across the localities is warranted. The table below shows the relative variance across the localities for residential and nursing care homes.

Variance in Supply in 2011 Across Localities

	Chiltern Vale	Leighton Buzzard	West Mid Beds	Ivel Valley	Total
Residential Care homes	371	134	30	129	664
Places per 1000	**68.5**	**41.0**	**7.2**	**24.4**	**36.7**
Nursing Homes	74	199	87	190	550
Places per 1000	**13.7**	**60.9**	**21.0**	**36.0**	**30.4**
Total	445	333	117	319	1214
Places per 1000	**82.2**	**101.8**	**28.2**	**60.4**	**67.0**

Whilst in Chiltern Vale the overall supply of care homes exceeds the demand there is a shortfall in nursing home places. The opposite is true in Ivel Valley where nursing home supply exceeds demand and providers regularly support people requiring care only. As new care home developments are proposed across localities it will be important to encourage services that are flexible and can support both residential and nursing needs. Indeed, nursing homes should generally be favoured over care homes unless the locality has sufficient existing nursing supply or the service is aimed at catering for specialised support, including severe dementia.

6 ISSUES

6.1 The assumptions used to forecast the future care home demand have been based on the experience of placements into care homes, information about vacancy rates and the potential level of diversion from care homes into extra care (see para 4.8 to 4.13). The places per 1000 figure used, therefore, is less than that employed by the More Choice Greater Voice model but is felt to be a more appropriate reflection of the care home demand for Central Bedfordshire. Since a slight change in the figure has a noticeable impact on predicted demand it will be important to keep these assumptions under review, especially as new extra care services become available.

6.2 The locality population figures used for 2025 and 2030 have been estimated using the Central Bedfordshire level projections rather than actual ward level predictions. This creates an overall variance of less than 1%, equivalent to 4 places. Whilst this is insignificant given the volumes, the population trends at a ward level should be kept under review as additional major developments are considered and forecasts reconsidered as ward level projections are published for 2025 and 2030.

Appendix 1

Forecast Care Home and Extra Care Demand and Supply

Demand Based on the model:

All Central Bedfordshire

	2011	2015	2020	2025	2030
Residential Care Places	673	689	652	820	934
Nursing Care Places	606	679	809	1017	1159
TotalCare Home Places	**1279**	**1368**	**1461**	**1837**	**2093**
Extra Care For Rent	149	167	200	250	285
Extra Care Leasehold	303	340	406	509	580
Total Extra Care Places	**452**	**507**	**606**	**759**	**865**

Chiltern Vale

	2011	2015	2020	2025	2030
Residential Care Places	201	206	187	235	268
Nursing Care Places	181	203	232	292	332
Total	**382**	**409**	**419**	**527**	**600**
Extra Care For Rent	44	50	57	71	81
Extra Care Leasehold	90	101	116	146	166
Total Extra Care Places	**134**	**151**	**173**	**217**	**247**

Leighton Buzzard

	2011	2015	2020	2025	2030
Residential Care Places	121	123	117	147	168
Nursing Care Places	109	122	145	183	208
Total	**230**	**245**	**262**	**330**	**376**
Extra Care For Rent	26	30	35	45	51
Extra Care Leasehold	54	61	72	91	104
Total Extra Care Places	**80**	**91**	**107**	**136**	**155**

Estimated Supply

All Central Bedfordshire

	2011	2015	2020	2025	2030
Care Home Supply	1214	1418	1364	1364	1364
Excess (Deficit)	(-65)	50	(-97)	(-473)	(-729)
Extra Care Supply	149	314	611	611	611
Excess (Deficit)	(-303)	(-193)	5	(-148)	(-254)

Chiltern Vale

	2011	2015	2020	2025	2030
Care Home Supply	445	586	502	502	502
Excess (Deficit)	63	177	83	(-25)	(-98)
Extra Care Supply	49	132	264	264	264
Excess (Deficit)	(-85)	(-19)	91	47	17

Leighton Buzzard

	2011	2015	2020	2025	2030
Care Home Supply	333	333	303	303	303
Excess (Deficit)	103	88	41	(-27)	(-73)
Extra Care Supply	33	115	115	115	115
Excess (Deficit)	(-47)	24	8	(-21)	(-40)

West Mid Beds

	2011	2015	2020	2025	2030
Residential Care Places	154	162	156	196	223
Nursing Care Places	138	159	193	243	277
Total	**292**	**321**	**349**	**439**	**500**
Extra Care For Rent	34	39	47	59	68
Extra Care Leasehold	69	79	96	121	138
Total Extra Care Places	**103**	**118**	**143**	**180**	**206**

West Mid Beds

	2011	2015	2020	2025	2030
Care Home Supply	117	180	150	150	150
Excess (Deficit)	(-175)	(-141)	(-199)	(-289)	(-350)
Extra Care Supply	33	33	113	113	113
Excess (Deficit)	(-70)	(-85)	(-30)	(-67)	(-93)

Ivel Valley

	2011	2015	2020	2025	2030
Residential Care Places	196	197	191	241	274
Nursing Care Places	176	194	238	299	341
Total	**372**	**391**	**429**	**540**	**615**
Extra Care For Rent	43	47	58	73	83
Extra Care Leasehold	88	97	119	149	170
Total Extra Care Places	**131**	**144**	**177**	**222**	**253**

Ivel Valley

	2011	2015	2020	2025	2030
Care Home Supply	319	319	409	409	409
Excess (Deficit)	(-53)	(-72)	(-20)	(-131)	(-206)
Extra Care Supply	34	34	119	119	119
Excess (Deficit)	(-97)	(-110)	(-58)	(-103)	(-134)

These figures are based on the following levels of places per 1000:

	2011	2015	2020	2025	2030
Residential Care	37.2	34	27	27	27
Nursing Care	33.5	33.5	33.5	33.5	33.5
Extra Care	25	25	25	25	25