

Appendix One – Needs Assessment Update and Market Position

Headlines

- In South East Dorset the population aged 75 and over will increase by 67% over the next 20 years
- The number of people in South East Dorset living with Dementia will increase by significant percentages over the next 20 years – 92.3% in over 85 year olds
- Changes to Hospital Discharge model are expected to lead to 400-500 additional people engaging with Adult Social Care over the course of 2021, 68% of whom will be aged 80 or over
- These factors, combined with Covid impacts will drive demand for complex and nursing care homes places
- The cost of care home placements has risen by an average of 24% since the beginning of Covid pandemic, and national predictions state that this is not expected to be under control until 2026
- Based on population growth estimates, South East Dorset is undersupplied with Extra Care housing and based on current market will need 140 units of accommodation by 2040. Strategic Direction for greater independence and use of Extra Care as alternative to Residential Care Home will further increase this demand.
- The number of working age adults with disabilities is not expected to increase, but there is an undersupply of appropriate housing and services. Adults with Learning Disabilities are living longer At least 30 homes will be needed in the next 5 years. Various types of housing and support will be required, including use of Extra Care for older working age adults with learning disabilities.
- Affordable general needs housing is in high demand, with over 500 people on the housing register in South East Dorset including 34 people in temporary accommodation. This does not include those families accommodated within the Red Oak Court relocatable housing.
- Housing and buildings need to be flexible in how they can be used and need to be designed to adapt to peoples changing needs and aspirations so people are not forced to move because their support needs change.

Detailed Needs Refresh

1. Population Projections

In April 2021, the South East Dorset area (defined as being the former Purbeck District Council boundary) is estimated to have a population of 47,135 people, of whom 12,991 (27.6%) are aged 65 and over. It is estimated that 920 people aged 65 and over were living with Dementia in 2020.

In South East Dorset, the population is expected to grow by 12.8% between 2020 and 2040, and over the same period there is expected growth in all adult age groups. This is in contrast with other parts of Dorset, where there is expected to a fall in the number of people aged 25-64. Growth in 75-84 year olds in South East Dorset is expected to be 61.6%, and growth in population of people aged 85+ is expected to be 88.6%. This population growth is largely due to net migration of people into the area. Reflective of the overall population growth in this age cohort, the number of people aged 65 and over with mobility difficulties is predicted to rise by 51% between 2020 and 2040, from 2,410 people to 3,640. The bulk of the percentage rise is for people aged 85 and over. In Dorset, there is an 10 year difference between average life expectancy (85 in females and 81 in males) and average healthy life expectancy (78 in females and 76 in males). Nationally, average life expectancy once someone moves into a Care home is 24 months for Residential Care, and 12 months for Nursing Care.

2. Dementia

The number of people estimated to have dementia in South East Dorset is predicted to rise considerably between 2020 and 2040 – from 530 to 750 (41.5% increase) in people aged 65-84, and from 390 to 750 (92.3% increase) in people aged 85 and over. The rising numbers is fuelled by the estimated rise in overall population within these age categories.

3. Population Health

Currently, 2,520 (7.4%) of the population registered with the Purbeck Primary Care Network are living with 3 or more long term conditions. Currently, 6,361 (18.8%) of the population registered with the Purbeck PCN are considered to be 'Frail'. 10% of this 'frail' population are considered to be at risk of falls, and 7% have fallen within the last 12 months.

4. Hospital Discharge

Across Dorset, as a result of Covid there has been a significant rise in the number of people being discharged from Hospital into Care Services, as part of Pathway 1 and 2 of the Home First operating model. Hospital discharge has become the primary reason people enter Care services, going from 10% of annual admissions to 70%. In 2021, the Adult services directorate anticipate needing to work with an additional 400-500 people who previously would have not had any dealings with the Local Authority. 68% of all people discharged from Hospital are aged 80 or over, and the majority require specialist care when they leave hospital.

5. Learning Disability

The number of working age adults predicted to have a moderate or severe Learning Disability in South East Dorset is expected to increase by 7.14% between 2020 and 2040. This is relatively low growth but is against a more general trend in Dorset in which this cohort of people is expected to reduce slightly. This does represent a relatively small cohort of people - 140 people with a moderate or severe Learning Disability, rising to 150 by 2040.

6. Mental Health

Estimates for the number of people predicted to have a Serious Mental Illness have not been updated since the Business Case. Purbeck GP Locality supports approximately 300 people with SMI. The number of people supported in South East Dorset is expected to increase slightly to 307 people by 2026/27. Up until 2040 these numbers are not expected to significantly increase. The short and long term impacts of Covid-19 on mental health are not yet known, but it is expected that there will be an increase in activity for Mental Health services across Dorset as an associated impact of the virus itself, lockdown, and due to other pressures such as economic harm and housing insecurity. This is not likely to affect the number of people with serious long term conditions and complex mental health needs, and it is unlikely that this will generate accommodation pressures beyond those already arising in demand for general needs housing.

7. Physical Disability

The number of working age adults with serious physical disability in South East Dorset is expected to fall by 4%, from 240 people in 2020, to 230 people by 2040. There is also an expected 2.5% fall in the number of working age adults with impaired mobility, from 1,600 to 1,560. There are currently 27 people on the Housing Register in South East Dorset who have self-identified as Wheelchair Users, and a further 98 people who require housing with some form of adaptation. None have indicated that they are registered as Disabled, but this relies on the information provided by the applicant when they join the register.

8. Care Leavers

Since the production of the business Case it has also been established that there are 10 Care Leavers in South East Dorset will need suitable accommodation options as they become adults.

9. General Housing Need

There are 34 people living in temporary accommodation in South East Dorset, including 3 in Bed & Breakfast accommodation, and a further 505 households on the Housing Register, so provision of affordable general needs housing remains a crucial component. The 4 units of relocatable housing for Homeless people will also need to feature in the long-term project. It is important to note that the number of people on the housing register has grown since January 2020, indicating that one of the impacts of Covid-19 has been on housing security and suggesting a greater pressure on already limited housing stock.

10. Impacts of Covid-19

Future demands on care services and emergency housing are expected to rise as a result of Covid-19, for two main reasons. Firstly, as a consequence of delayed or stopped health treatment more people will contact health and care services in crisis, and will be more likely to need more intense care. Secondly, as economic harm starts to impact and more people are impoverished, become homeless, or develop mental health issues or distress, the Directorate expects further demand on emergency housing services.

11. Specialist accommodation for working age Adults with Disabilities

The provision of accommodation for working age adults in South East Dorset is underdeveloped – for example there are currently 85 people on the Learning Disability Team caseload but only 29 supported living properties available in the locality, which includes the Relocatable Housing units that will need to be replaced as part of this project. Following a detailed investigation of current accommodation needs on our caseload, Commissioning have identified a need for 22 new properties to meet predicted need in Purbeck area. The majority of these need to be individual properties covering a mix of lower level need at Local Housing Allowance Rents, and higher complexity services which could support higher levels of rent. There needs to be a mix of accessible and fully adapted properties within this – blocks of 10 apartments built in two storeys with adapted accommodation on the ground floor and level-access on the first floor would give maximum flexibility for meeting a wider range of mobility needs.

12. Specialist accommodation for People with Mental Health problems

For the most part people with Mental Health problems don't need specialist accommodation but need to access housing from the general needs stock, which is in short supply in South East Dorset. However, as part of the Mental Health Rehabilitation Review, NHS Dorset CCG and NHS Dorset Healthcare have identified a need for 21 units of Supported Living to support Mental Health Rehabilitation. Lack of available Supported Accommodation was identified as a major factor in long hospital stays and delayed discharge for people going through Rehab, and creation of this provision is a key factor in transformation of rehab services in Dorset. Currently, Commissioners have identified the need for a block of 6 individual apartments with communal space and sleep-in staff facilities covering the whole block to meet community-based Mental Health Rehabilitation needs. This needs to cover Purbeck and East Dorset, so further consideration of other factors such as availability of staffing is required before preferred location of this is finalised.

13. Accessibility of General Needs Housing stock

The housing team don't hold information on the number of Housing Association properties that are wheelchair accessible or adapted. Because they are accessed using Choice-based Lettings, individuals review the details of the property and determine if it will meet their needs or not.

Care Market position refresh

14. Covid-19 has had a considerable impact on the Care Market nationally and locally, and there has been an acceleration in trends we were seeing before the outbreak of pandemic. As at 5th April 2021, 13.15% of all beds in the Dorset Care Home market are currently vacant, a figure that is increasing weekly. Some vacancies are a result of the homes being closed to admissions as part of Covid-secure measures. Many of the remaining vacancies are not considered appropriate or are unable to manage the complex care required by many people being discharged from Hospital, leading to a decrease in demand for Residential Care combined with an huge pressure on demand for complex care and nursing care beds. The full impact of Covid-19 on this sector is not yet known, but Adult

Commissioning expect there be to a permanent contraction in the Residential Home market which will likely include some service failures, national predictions state that the Care Market is unlikely to settle until 2026. Across Dorset as of 5th April 2021 there are 19 care homes carrying between 20% and 40% voids, and 3 with more than 40% voids.

15. The fall in appropriate supply combined with the increases in demand have resulted in significant cost pressures across Care Home placements in Dorset, with an average price increase of 24% across the council area. The impact of the rising cost of care is exacerbated by the increasing number of people requiring long-term care post-hospital discharge.
16. We have been working with colleagues in Adult Social Care operations and commissioning to review whether the type of services and accommodation we have included in our planning is still relevant. They are summarised below:
 - 16.1. **Flexible Buildings** - Throughout the development of accommodation in this project, the importance of flexibility in the design and use is of critical importance. The demands on the care market are very turbulent, and alongside that we are trying to anticipate and account for changing culture and expectations about how people want to live their lives and meet their own needs. Making sure that developments are flexible enough to change over their lifetime is important for the longevity of the project and to protect investment in the longterm. For example, being able to convert Care Homes into Extra Care housing, or building Homes for Life to ensure they continue to remain suitable as someone ages will be a key consideration throughout this project.
 - 16.2. **Nursing Care Home** – there has been no change in the provision of Nursing Care in Wareham, and because we are focussed on provision of complex Dementia and Nursing care this remains a requirement in South East Dorset. Demand for this level of care has increased significantly across Dorset because of the Covid Hospital Discharge pathways. The focus of the Nursing Care Home service incorporated into the Purbeck Gateway Project is for a level of complexity where the alternative would be hospital. Furthermore, development of this service gives Dorset Council a significant opportunity to bring the cost of care more directly under control in Wareham and surrounding areas.
 - 16.3. **Extra Care Housing** – the fall-off in demand for Residential Care services is mirrored by an increasing requirement for alternative solutions for people with this level of care and support need – both for Home Care services and for Extra Care housing. The Housing Learning Improvement Network (Housing LIN) have produced a toolkit for estimating demand for Extra Care Housing, based on research into how the market has developed across the Country. The toolkit finds that to meet demand for Extra Care Housing there should be 22.5 units for every 1,000 people aged 75 and over. For the South East Dorset area this conversion rate suggests that 142 units of Extra Care housing are needed in 2020, and 238 units will be needed by 2040. Currently, there are no rented or shared ownership Extra Care housing

schemes in South East Dorset – the closest is Trailway Court in Blandford. The Housing LIN estimate that approximately 50% of Extra Care supply should be rented or affordable shared ownership, which demonstrates the need to create approximately 70 units in South East Dorset now, followed by a further 70 units within the next twenty years. Research shows that most people moving into Extra Care Housing are aged 70 or over (84%), although Commissioners in Dorset are working to develop a more inclusive Extra Care model that can meet the needs of younger adults where appropriate. Greater supply of Housing with Care is a key part of our strategic direction, and is needed to bring about cultural change away from more restrictive forms of care such as Care Homes.

16.4. **Supported Housing** – Red Oak Court, our relocatable scheme, has been completed and provides supported housing for 13 people with Learning Disabilities or Mental Health problems, and four households from the Housing Register. The long-term plan has always been to create permanent properties for these people to move on to so the Relocatable Housing can be moved and used to support housing need elsewhere in the county. Detailed analysis of current and projected accommodation need for people with Learning Disabilities and Mental Health issues in Purbeck indicates the need for the following accommodation, in addition to those already provided at Red Oak Court.

- 16.4.1.1. Ten self-contained flats with communal facilities, background support and sleep accommodation. Flats on the ground floor should be level access to allow for people with mobility issues.
- 16.4.1.2. Ten self-contained flats, large enough for 1:1 staffing levels. Sleep-in facilities on site and flats on ground floor should be level access to allow for people with mobility issues.
- 16.4.1.3. Two shared properties (accommodating 3 people per household) with single person annexes – preferably bungalows.
- 16.4.1.4. Six self-contained flats with communal facilities and sleep-in facilities to support Mental Health recovery model. Flats on ground floor level access/wheelchair accessible

16.5. **Affordable Housing** – as of September 2020 there were 34 households living in Temporary Accommodation in South East Dorset, and there are 550 people on the Housing Register in South East Dorset (an increase of 48% since January 2020). There are currently 3 households occupying B&B or Caravan emergency accommodation waiting for a move to temporary accommodation.

16.6. **Keyworker Housing** – affordable housing and the wage gap in Dorset remains a barrier to recruitment to a number of sectors, particular Care and Support which is a relatively low-paid sector. There is no strong quantitative evidence for the demand for keyworker housing but the advantage is that it can be used to meet demands for general needs affordable housing if specific keyworker demand is not forthcoming. This will be enabled through

the Local Lettings Plan and Housing Management Agreements developed for this project.

Sources:

ONS Mid-year Population Estimates

Projecting Older People Population Information (POPPI)

Projecting Adult Needs and Service Information (PANSI)

Mosaic (Social Care Case management system)

Dorset Intelligence and Insight Service (DiiS)

Dorset Housing Service

Quantifying the Financial Impact of the Pandemic on ASC&H – Jan 2021

Housing LIN SHOP Tool