



# Accommodation for an ageing population

## Powys County Council

A guide for providers about Powys' housing and care related services for older people, explaining the current situation and future requirements that older people in Powys have.

Market Position Statement March 2017

**Review date: June 2018**





## Table of Contents

	Page		Page
Foreword.....	3	Appendices - useful links and information.....	29
What outcomes do we want?.....	4	Forum events.....	30
The challenge we have.....	5	References.....	31
The local picture.....	6		
Key pressure points.....	9		
What do people want?.....	10		
Broad commissioning intentions.....	11		
Community area 1: North East Powys.....	12		
Community area 2: North West Powys.....	14		
Community area 3: North Central Powys .....	16		
Community area 4: Mid East Powys.....	18		
Community area 5: Mid West Powys.....	20		
Community area 6: South Central.....	22		
Community area 7: South West Powys.....	24		
Workforce within the Powys care sector.....	26		
Finance.....	27		
Quality of the local market.....	28		

### **What is a market position statement used for?**

We have a responsibility to commission the right services to meet the needs of our citizens, both now and in the future.

This document has been written to enable everyone to better understand the situation in Powys and plan for our future.

#### **Note:**

The commissioning intentions are realistic at the time of considering the data, however, they may change as this is updated.

Any changes will be reflected in annual updates, in light of the strategic direction set and in line with the Health and Social Care strategy.



## Foreword

As Cabinet Portfolio holders, we have great pleasure introducing you to the first Market Position Statement for Older People's Accommodation in Powys.

Evidence shows us that the more independent people are, and the better connected with their local communities and services, the better their health and well-being.

We recognise the need not only to modernise and maximise our existing provision, but also to develop new and innovative ways of meeting our future demand and changing aspirations without reducing the quality of care provided. This will be a challenge as the population aged 65 and over in Powys rises by a predicted 38% between now and 2036<sup>1</sup>.

For this reason it is important that we review the accommodation available for older people, the potential role of partner organisations and other private or community bodies in helping to meet this need.

We hope the information provided within this document will provide a useful insight into the market in Powys, its geography, expected demographic changes and future challenges, and look forward to helping you pursue your interest further.

Councillor **Stephen Hayes**  
*Portfolio Holder for*  
**Adult Social Care**

Councillor **Rosemary Harris**  
*Portfolio Holder for*  
**Housing**

### Our key principles are:



Choice of lifestyle and accommodation for all regardless of personal financial circumstances

Created by Niles Van den Broek Project



Accommodation that is appropriate and meets need

An environment that supports and enables lifestyle choice



Able to move to appropriate accommodation when the time is right

Living at home with your own front door in your community



Enable a real community of mixed ages, tenures and abilities



Well located accommodation with easy access to local amenities, services and transport



Accommodation developed and provided through partnership working



Future proofing new developments which are built to lifetime homes standards



To achieve the above with the best use of resources

**Note:** Please note that there is a mix of population data looking at different age groups throughout the document, particularly those aged 65 and over, 75 and over and 85 and over.



## What outcomes do we want?

- Increase independence by improving our responsiveness to individuals' needs in their own home.
- Improved choices over accommodation, care and support that enables independent living for older people (within their own self-contained accommodation).
- Individuals will receive appropriate care and support in the right place at the right time, which will optimise their potential for recovery and recuperation.
- Mixed community developments supporting people with different levels of ability including different tenures.
- Reinvestment of resources into preventative services, offering a range of accommodation choices.

## How will we know we have succeeded?

- Number of accommodation types that reflect the commissioning intentions within each community (10% tolerance).
- Increase the number of people who describe themselves as living in appropriate accommodation that provides dignity and respect.
- A general shift in provision from residential care to community housing with care.
- Readmission rates: 28 days and 3 months.
- Reduce the length of stay in hospital.
- Time from when the person was declared fit to leave hospital, to when they were transferred.
- Waiting times: how quickly a person receives care from when it is recognised that care is needed.
- Reduce unplanned emergency admissions.
- Reduce Delayed Transfer Of Care (DTCOC).



## The challenge we have

### Population - now and in the future

#### National overview<sup>2</sup>

The UK population as a whole is ageing, there are currently 9.3 million households headed by a person over retirement age. This is expected to reach 13 million by 2033.

The types of housing currently on offer do not suit the choices that our older people make. Retirement properties make up 2% of the UK housing stock (533,000 homes) with just over 100,000 available to buy. 25% of over 60s would be interested in buying a retirement property, equating to 3.5 million people nationally.

58% of over 60s are interested in moving property and this would free up many family-sized properties onto the property market.

#### Powys overview

34,158 people are aged 65<sup>3</sup> and over in Powys and by 2036, this is predicted to increase by 38% to 47,165<sup>1</sup>. The chart shows that there is a projected increase in the 75 plus range, with the 85 plus population more than doubling.

This means that we need to plan ahead and ensure we have a market that offers good quality specialist housing that meets the needs of our citizens and enables them to live independently for as long as they can. We currently have insufficient accommodation choice to meet the projected demand. Improving accommodation choices should result in a reduced requirement for health and social care services.

### Life expectancy<sup>4</sup>

Males: 78.3 years

Females: 82.3 years

### Dementia



Credited to Stephen Paster  
Brain Nerve Project

2,330<sup>5</sup>

estimated

dementia cases  
2015

82%

Projected to  
increase to  
4,231<sup>6</sup>  
by 2036

Population: 132,642<sup>3</sup>

Average age: 45 years

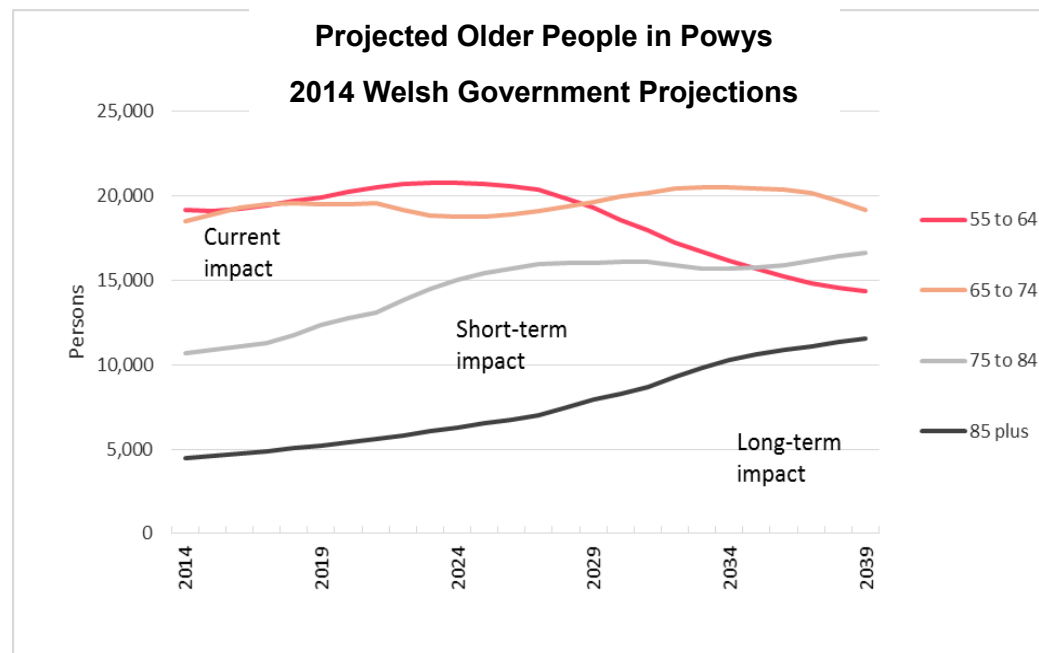
mid-year estimate 2014

Lone-person  
households 65+<sup>7</sup>

9,201

equates to 16% of all  
households

UK: 3.5million





## Population - The local picture

### Demography

Powys covers a quarter of the geographical area of Wales and has an overall population of 132,642<sup>3</sup>.

It is the most sparsely populated county in Wales with just 26 persons per square kilometre.

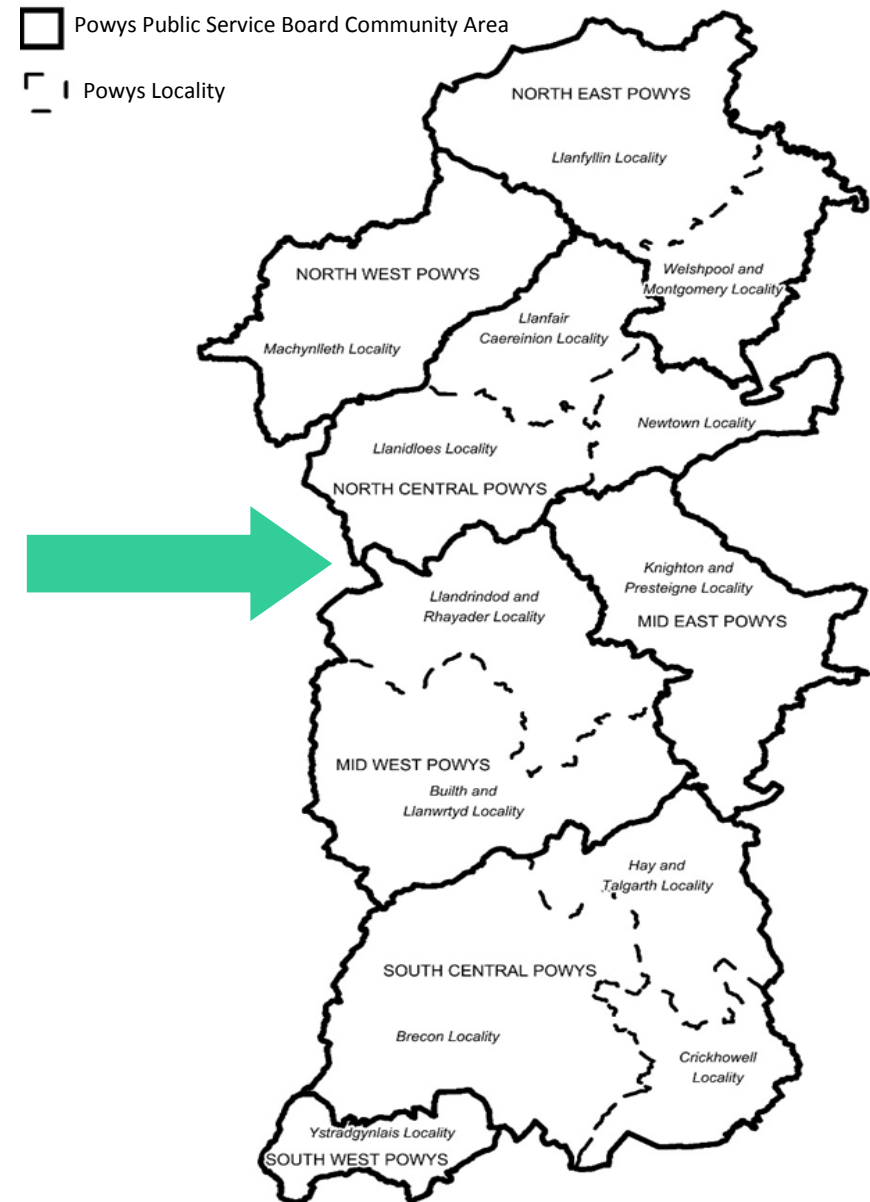
### How are we analysing our data?

In order to fully understand the needs of our citizens, we cannot just look at the whole of Powys because there are differences in supply and demand across the county. Instead, we have split Powys into **7 community areas** to help better understand differences. These areas were agreed by the Public Service Board and the areas reflect natural communities as well as the main GP clusters.

The 7 community areas can also be broken down further into 13 localities, or main towns, for more information please see [insert link to webpage](#).

Community area	Locality
North East	Llanfyllin, Welshpool and Montgomery
North West	Machynlleth
North Central	Newtown, Llanfair Caereinion and Llanidloes
Mid East	Knighton and Presteigne
Mid West	Llandrindod and Rhayader, Builth and Llanwrtyd
South Central	Brecon, Hay and Talgarth, Crickhowell
South West	Ystradgynlais

Additional information © Powys County Council 2016 No additional copies should be made without the permission of the Council.  
Gwybodaeth ychwanegol © Cyngor Sir Powys 2016 Ni ddylid ganeud unrhyw gopïau ychwanegol heb ganiatâd y Cyngor.





## Population - The local picture

Community area	65+ population <sup>3</sup>	Homes with mobile warden	Homes with Careline alarm connection
North East	7,083	224	383
North West	1,555	62	96
North Central	6,856	218	400
Mid East	2,900	73	108
Mid West	5,528	183	252
South Central	7,650	410	486
South West	2,586	250	280

A high percentage of people living in Mid East and Mid West Powys are aged 65 and over.

### Housing Tenure<sup>9</sup>

Owned Outright



Owned with a mortgage

Rented from LA

Other Social Rented

Private Rented or Living Rent Free

Type	Supply (2016)	Demand (2035)	Difference <sup>10</sup>
Sheltered housing	1,972	3,296	+ 1,324
Extra care	231	775	+ 544
Residential	580*	580	0
Nursing	322**		

\*Future demand for residential care over and above current supply will be met through developing extra care.

\*\*Further work is being undertaken to model the nursing demand in line with the Health and Care strategy.

Our findings show that **31%** people questioned live in urban areas, **35%** live in rural or sparsely populated areas (**28%** did not answer)

### Condition of housing

#### No Powys data

It is estimated that **1/3** people in the UK live in non-decent or hazardous housing

### Health<sup>12</sup>

**6.1%** people in Powys report having bad or very bad health

### Excess bedroom space<sup>8</sup>

**81%** of all households have at least **one spare bedroom**

- 89% for owner occupiers
- 57% for social rented
- 69% for private rented

### Active older people<sup>13</sup>

Powys is highest in Wales for those aged 50+ participating in sport or activity (**61%**)

(Wales: 46%)



## Population - The local picture

### Self-funders<sup>11</sup>

**239** self-funders in Powys care homes occupying 22% of care beds

Community area	Number of beds occupied by self-funders	Percentage of total beds in community area
South Central	74	31%
North Central	41	26%
Mid West	52	24%
Mid East	5	23%
North East	50	22%
South West	16	8%
North West	1	3%

### Vacant Beds<sup>11</sup>

There are **73** vacant beds in Powys care homes

Community area	Number of vacant beds	Percentage
Mid West	19	26%
South West	18	25%
North East	17	23%
South Central	16	22%
North Central	2	3%
North West	1	1%
Mid East	0	0%

### So what?

- The current supply of accommodation available across the county is limited and there is a clear message from Powys citizens that they generally want to stay at home and therefore require alternative provision to residential care.
- Research suggests that inaccessible or inappropriate housing can significantly reduce the ability of people who have ill-health or a disability to lead, good quality lives and in many cases is a direct contributor to unnecessary entry into long-term care.
- Home ownership is high so any developments need the opportunity for people to purchase as well as rent.
- A percentage of newly built sheltered and extra care need to be 2 bedroom and be considerate of physical and sensory disability.
- Poor housing can trigger problems of anxiety, stress, depression, respiratory disease which may develop more quickly into a chronic or life threatening illness amongst older people. Information is required from the market in respect of the quality of housing in Powys.
- 83% projected increase in dementia requires appropriate new housing solutions to meet demand for quality, joined up housing and care.

**6,872<sup>14</sup>** people with a physical and sensory disability

**Unemployment<sup>16</sup>**  
1.1% unemployment (815 people)

**5%** of population receiving

**Disability Living Allowance<sup>15</sup>**  
(5,975 people)

### Reablement<sup>17</sup>

**752** incidents of reablement  
**165** were repeat users  
**237** required no ongoing care  
**95** had ongoing support  
**14** unknown



## Key pressure points

The graphic shows the 13 localities that sit within our seven community areas. Each area has been rated in terms of the services that are considered extremely important when assessing older people accommodation. Eight factors were deemed extremely important.

Calculating the Powys average, we have been able to identify which localities are better than average and which require prioritisation.

The key below identifies the factors that have been used to rate older people accommodation throughout the county.

### Key:



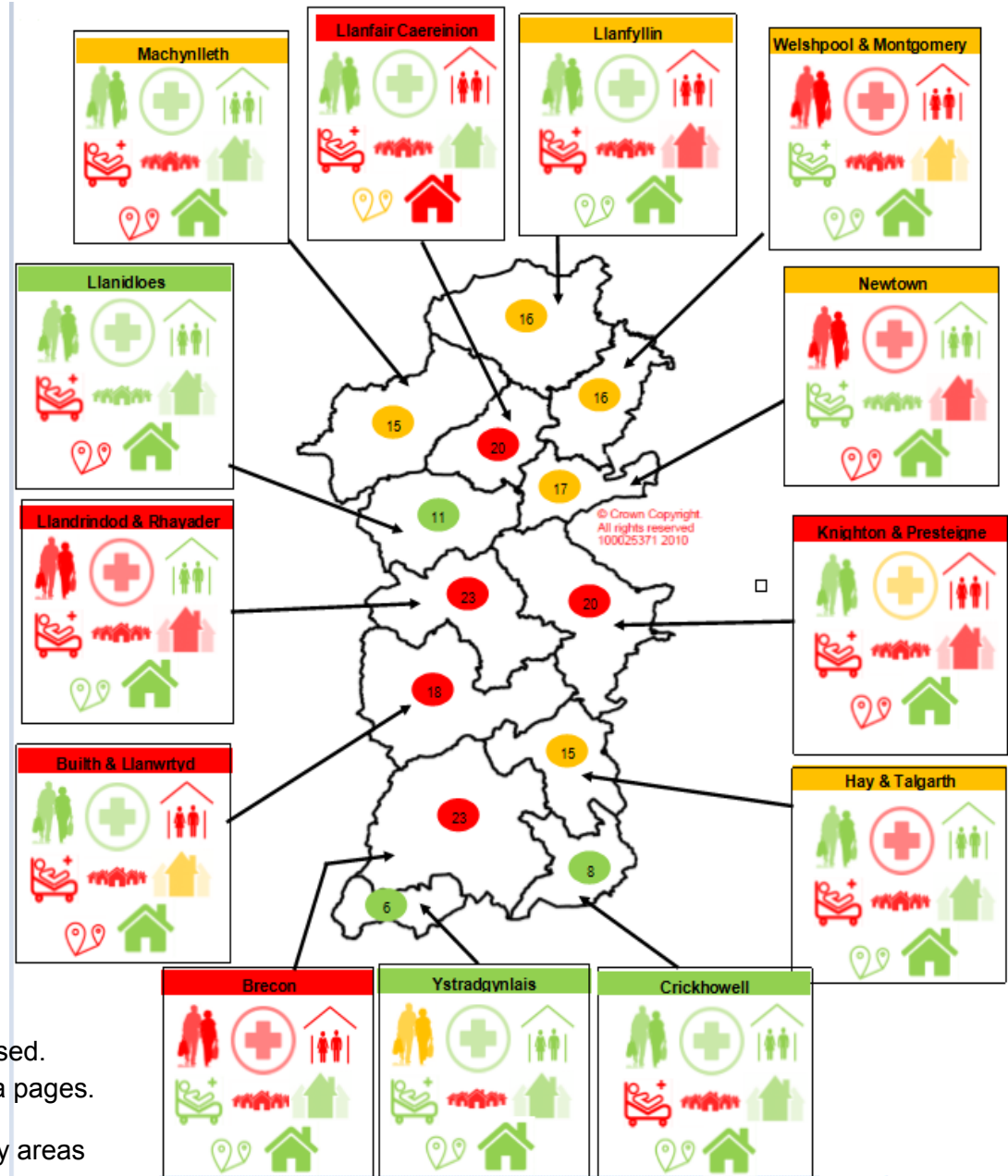
The shading assigned to each of the icons reflects how far from the Powys average each locality is:

- more than 10% above average (or no provision)
- Up to 9.9% MORE than the average

The community areas identified with an overall rating of red will be prioritised. Our commissioning intentions are outlined on each of the community area pages.

A more comprehensive picture of the differences amongst our community areas is available at [<insert link>](#)

**Note:** Residential EMI, nursing EMI, extra care, sheltered housing and distance travelled are all calculated per 1000 people aged 75+





## What do people want?



We have engaged with people aged 50 and over to identify their views on what they would need when they reach later years, and think about their future. We also asked providers, organisations and members to answer the same questions to help provide a fuller picture. Respondents were asked their general views about old age, mental health, physical incapacity and accommodation and service needs. These views have been used, along with the data to inform our commissioning intentions.

### Older persons perspective



Mixed housing tenure



Provide more bungalows for older people

Need to feel safe and secure in home



Located near to local amenities and groups

One size does not fit all. Need variety and choice



Wardens service is fantastic

When asked:

**35%** would prefer to own their own home

**17%** would like to rent from the Council

**5%** rent from other organisation

**3%** other

**40%** no answer

### Provider perspective



Ensure people live and feel safe in their own homes for as long as possible (most people want to avoid care homes unless absolutely necessary).



Need more 2-bedroom ground floor accommodation

Low maintenance long-term housing that will suit changing needs



Good access to services (GP / bus stop)

Suitable housing that older people can own as many people would prefer this



Dementia-friendly communities that will support the carers of those with dementia



Communities where older people live together and support one another

### What services would you be prepared to pay for?



Garden maintenance



Transport

#### Data Gaps:



Disabled access in local shops



Prescription collection / delivery

Public transport



Knowledge of where to obtain information about help, advice and support



District general hospital

#### Data Gaps:



Transport



Pets - being able to retain your pet as it is proven they have therapeutic benefits



Healthy living



## Broad Commissioning Intentions

Powys is expected to see an increase in the number of elderly residents unable to perform basic domestic tasks, and requiring domiciliary care and assistive technology. Home ownership for older people is in line with the National average for England and Wales and feedback from our older population suggests they want to stay in their homes for longer.

The current care provision is no longer suitable and other options need to be explored such as specialist housing with and without care, sheltered housing and/or extra care, to support people to live independent lives and remain in the community of their choice.

Working with our external partners, we must review and transform the way we currently provide services so we can deliver care closer to home. We have identified some broad commissioning intentions:



Integrated community HUBs built on the foundation of collaborative working between communities, care and support services.



Ensuring older people have the right information and advice to support the right decision making.



Supporting people to live as independently as possible: maximise independence, minimise dependence, intervene where appropriate.



Encourage the use of information technology and wider use of assistive technology to support people's independence.



Re-designate older person accommodation which is no longer considered as fit for purpose.



Dual registered homes.



Responding to what people tell us.



Encourage inter-generational accommodation and activities.



New sheltered housing project to be built to extra care standard to accommodate future needs.



Continuum of need structure.



Possible use of private development contract to mitigate costs of redevelopment of sites.



Facilities to support transfer to home and rehabilitative model to enable those people who can go home rather than into long term care.



If alternative models are developed in line with above possibilities, we can redirect the need for care home provision.

These broad commissioning intentions are refined at community level with the forthcoming pages providing information in respect of supply and demand as well as illustrating the community commissioning intentions.

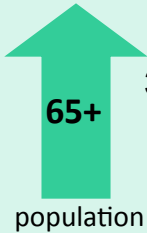


## Community area 1: North East Powys - Llanfyllin, Welshpool and Montgomery

### Population Projections<sup>1,3</sup>



**6% population decrease by 2036**  
27,676 to 26,038



**38% increase (2036)**  
7,083<sup>1</sup> to 9,835



**139% increase (2036)**  
990<sup>1</sup> to 2,369

**Welsh speakers:** 18% (5,013 people)



**Dementia<sup>5,6</sup>**  
**83% increase (2036)**  
497 to 910 people with dementia

Created by Stephen Paster  
Care Safety Project

### Pressures and Supply<sup>19</sup>

Key measures:



**85+ population in 2036<sup>1</sup>**  
**2,369 people**



**Delayed Transfers of Care (DTC)<sup>24</sup>**  
Average number of people:  
**0.85**



**Residential EMI per 1000 75+ population**  
**8 beds**



**Nursing EMI per 1000 75+ population**  
**12 beds**



**Extra Care units per 1000 75+ population**  
**0 units**



**Sheltered housing per 1000 75+ population<sup>26</sup>**  
**115 units**



**Distance travelled per 1000 75+ population<sup>25</sup>**  
Residents placed >10 miles from original home  
**2 people**



**5 Care homes** located in the community area  
79 residential beds, 16 residential EMI beds  
90 nursing beds, 40 nursing EMI beds



**Home Ownership of 65+ population<sup>9</sup>**  
81% of homes are owner occupied

**Lone person households 65+<sup>7</sup>**  
1,859 equates to 31% of households



**Unpaid Carers<sup>20</sup>**  
12% of population (3,186 people)

**Domiciliary Care hours (week)<sup>21</sup>**  
2,742 hours (99 per 1,000 population)  
199 clients

### Workforce

**9.4%** (1,303 people) of working population work in the care and leisure industry

### Unemployment<sup>16</sup>

**0.9%** of population (145 people)

### Disability living allowance<sup>15</sup>

**4%** of population (1080 people)





## Community area 1: North East Powys - Llanfyllin, Welshpool and Montgomery

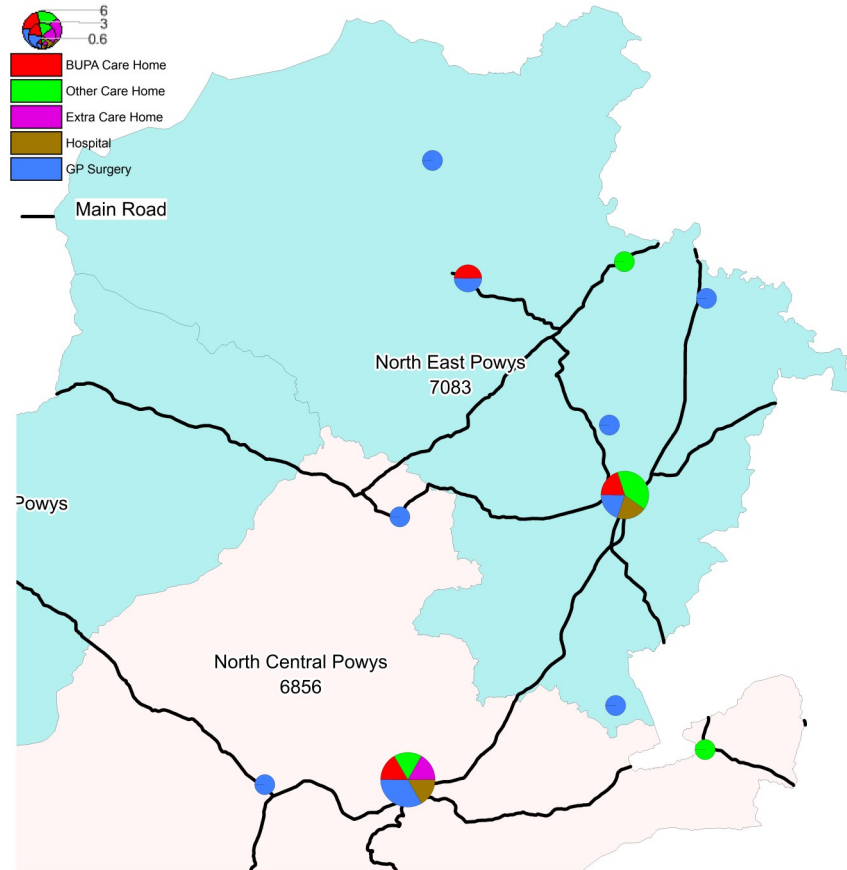
This map shows the percentage of the population who are aged 65 and over and the services provided in this community area in terms of care homes, hospitals and GP surgeries.

Percentage of Population aged 65 and over  
Source: Office for National Statistics 2015 Mid Year Population Estimates © Crown Copyright

- 27.5% or higher
- 25 to 27.5%
- under 25%

Number of Facilities

- 6
- 3
- 0.6
- BUPA Care Home
- Other Care Home
- Extra Care Home
- Hospital
- GP Surgery

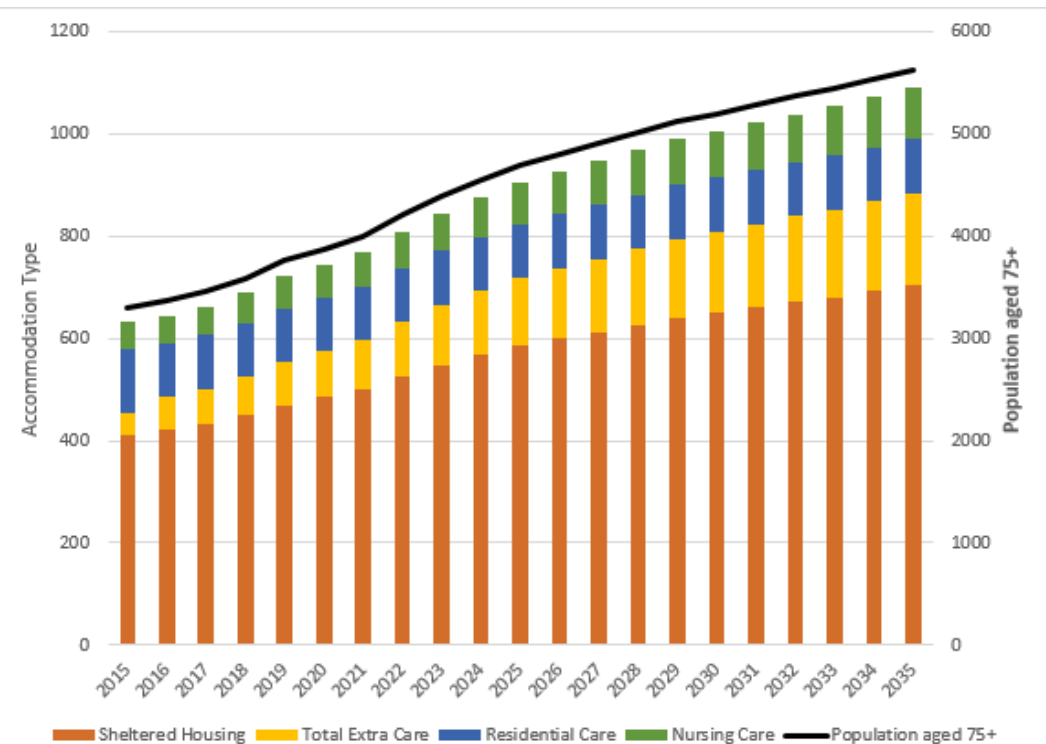


North East Service Board Area and Population Aged 65 or over (2015)

### Our indicative commissioning intentions:

Type	Supply (2016)	Demand (2035)	Difference
<b>Sheltered housing</b>	421	703	<b>+282</b>
<b>Extra care</b>	64	180	<b>+116</b>
<b>Residential</b>	106*	106	<b>0</b>
<b>Nursing</b>	54**		

**Projected accommodation modelling:** This chart shows projected demand for various older people's accommodation in Powys, based on current estimated demand at 2016 and Welsh Government population projections





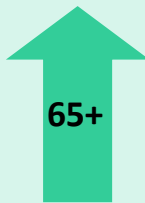
## Community area 2: North West Powys - Machynlleth

### Population Projections<sup>1,3</sup>



**6% population decrease by 2036**

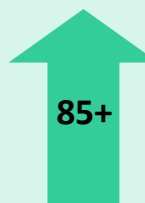
6,154<sup>1</sup> to 5,772



population

**38% increase (2036)**

1,555<sup>1</sup> to 2,160



population

**139% increase (2036)**

218<sup>1</sup> to 522

**Welsh speakers:** 53% (3,249 people)



**Dementia<sup>5,6</sup>**

**83% increase (2036)**

108 to 198 people with dementia

### Pressures and Supply<sup>19</sup>

Key measures:



**85+ population in 2036**

**522 people**



**Delayed Transfers of Care (DTC)**

Average number of people:

**0.29**



**Residential EMI per 1000 75+ population**

**25 beds**



**Nursing EMI per 1000 75+ population**

**0 beds**



**Extra Care units per 1000 75+ population**

**0 units**



**Sheltered housing per 1000 75+ population**

**132 units**



**Distance travelled per 1000 75+ population**

Residents placed >10 miles from original home

**4 people**



**2 Care homes** located in the community area

13 residential, 18 residential EMI beds



**Home Ownership of 65+ population<sup>9</sup>**

73% of homes are owner occupied

**Lone person households 65+<sup>7</sup>**

427 equates to 32% of households



**Unpaid Carers<sup>20</sup>**

12% of population (748 people)

**Domiciliary Care hours (week)<sup>21</sup>**

428 hours (69 per 1,000 population)

44 clients

**Workforce**

9.2% (284 people) of working population work in the care and leisure industry

**Unemployment<sup>16</sup>**

1% of population (35 people)

**Disability living allowance<sup>15</sup>**

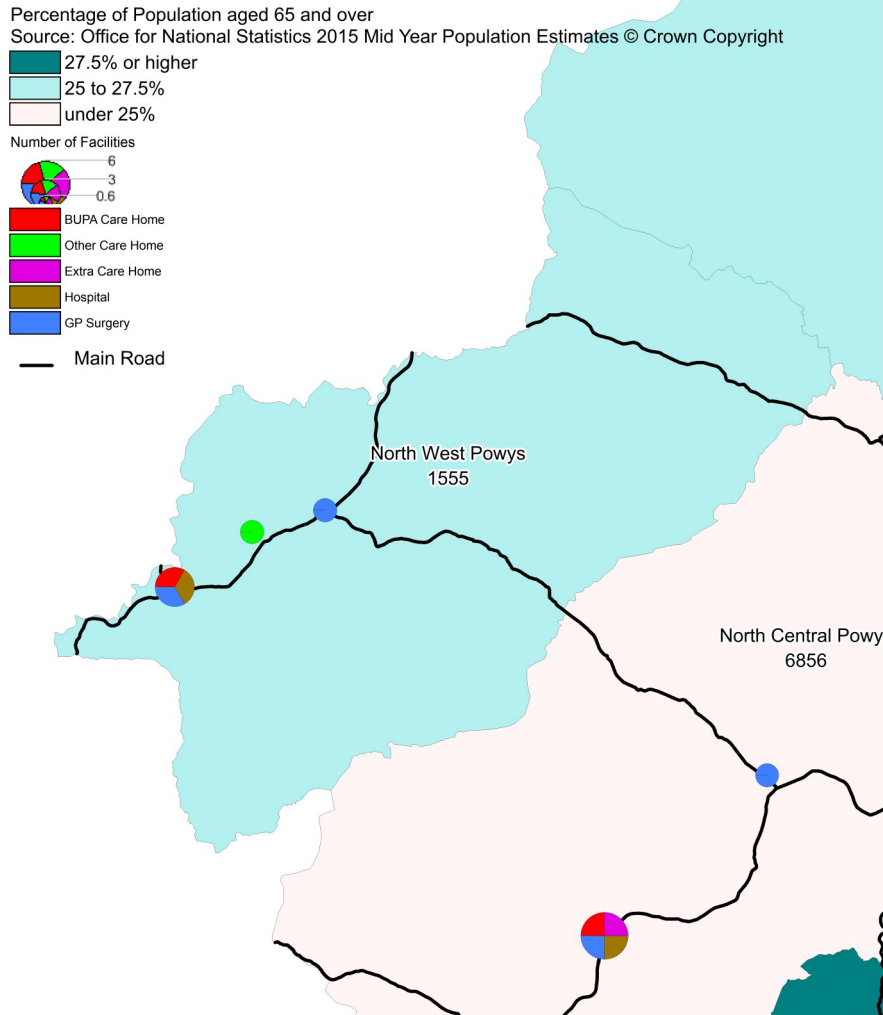
5% of population (315 people)





## Community area 2: North West Powys - Machynlleth

This map shows the percentage of the population who are aged 65 and over and the services provided in this community area in terms of care homes, hospitals and GP surgeries.

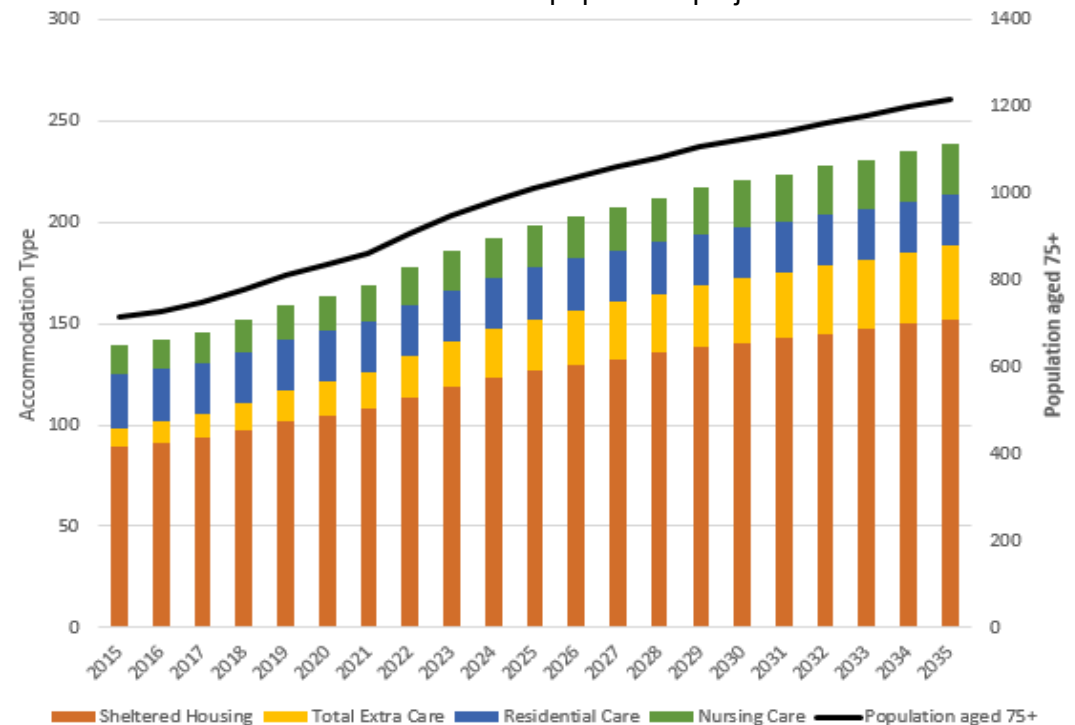


North West Service Board Area and Population Aged 65 or over (2015)

### Our indicative commissioning intentions:

Type	Supply (2016)	Demand (2035)	Difference
Sheltered housing	91	152	<b>+61</b>
Extra care	11	36	<b>+25</b>
Residential	25*	25	<b>0</b>
Nursing	15**		

**Projected accommodation modelling:** This chart shows projected demand for various older people's accommodation in Powys, based on current estimated demand at 2016 and Welsh Government population projections



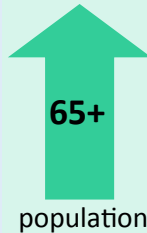


## Community area 3: North Central Powys - Newtown, Llanfair Caereinion and Llanidloes

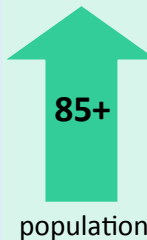
### Population Projections<sup>1,3</sup>



**8% population decrease by 2036**  
29,758<sup>1</sup> to 27,469



**38% increase (2036)**  
6,856<sup>1</sup> to 9,419



**139% increase (2036)**  
872<sup>1</sup> to 2,086

**Welsh speakers:** 17% (5,029 people)



**Dementia<sup>5,6</sup>**  
**82% increase (2036)**  
450 to 818 people with dementia

Checked by Stephen Paster from Neath Project

### Pressures and Supply<sup>19</sup>

Key measures:



**85+ population in 2036**  
**2,086 people**



**Delayed Transfers of Care (DTC)**  
Average number of people:  
**1.21**



**Residential EMI per 1000 75+ population**  
**16 beds**



**Nursing EMI per 1000 75+ population**  
**9 beds**



**Extra Care units per 1000 75+ population**  
**19 units**



**Sheltered housing per 1000 75+ population**  
**130 units**



**Distance travelled per 1000 75+ population**  
Residents placed >10 miles from original home  
**7 people**



**4 Care homes** located in the community area  
44 residential beds, 48 residential EMI beds  
38 nursing beds, 28 nursing EMI beds



**Home Ownership of 65+ population<sup>9</sup>**  
**73% of homes are owner occupied**

**Lone person households 65+<sup>7</sup>**  
**1,841** equates to 31% of households



**Unpaid Carers<sup>20</sup>**  
**11% of population (3,414 people)**

**Domiciliary Care hours (week)<sup>21</sup>**  
2,442 hours (82 per 1,000 population)  
175 clients

**Workforce**  
**10.2%** (1,504 people) of working population work in the care and leisure industry

**Unemployment<sup>16</sup>**  
**1.3%** of population (220 people)

**Disability living allowance<sup>15</sup>**  
**4%** of population (**1330 people**)

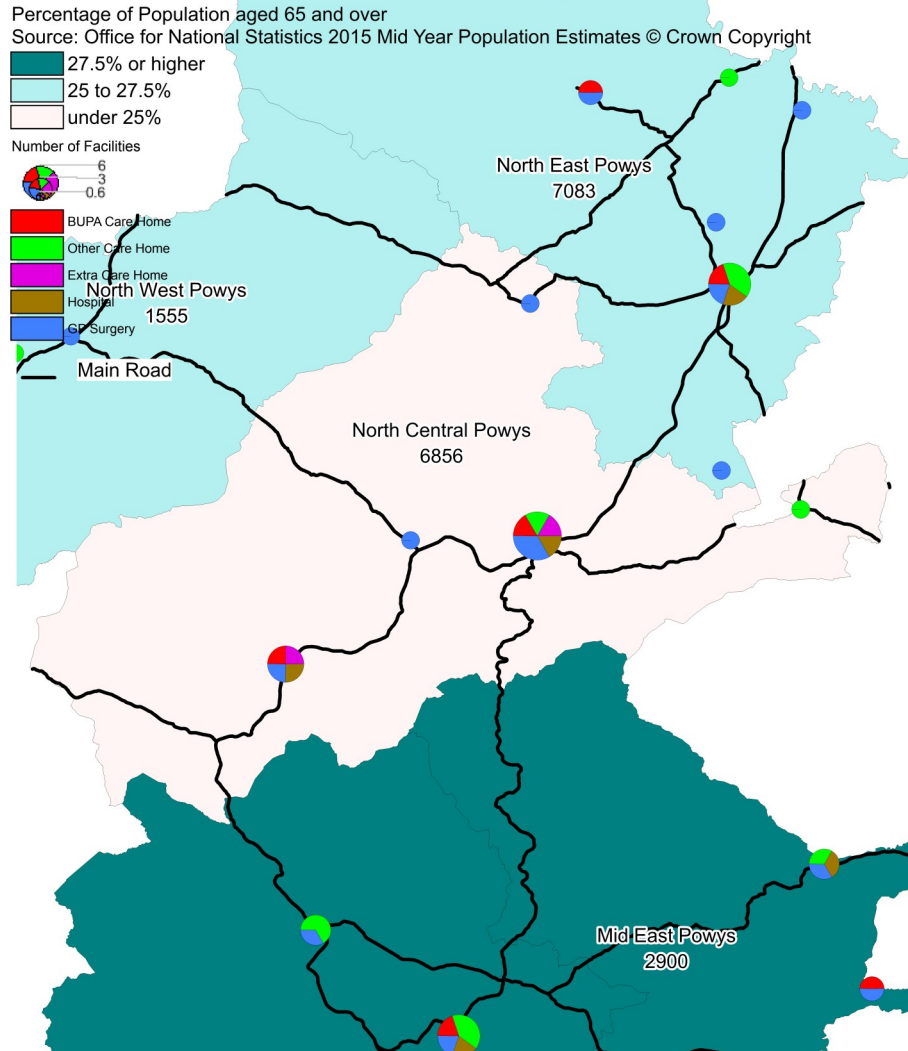






## Community area 3: North Central Powys - Newtown, Llanfair Caereinion and Llanidloes

This map shows the percentage of the population who are aged 65 and over and the services provided in this community area in terms of care homes, hospitals and GP surgeries.

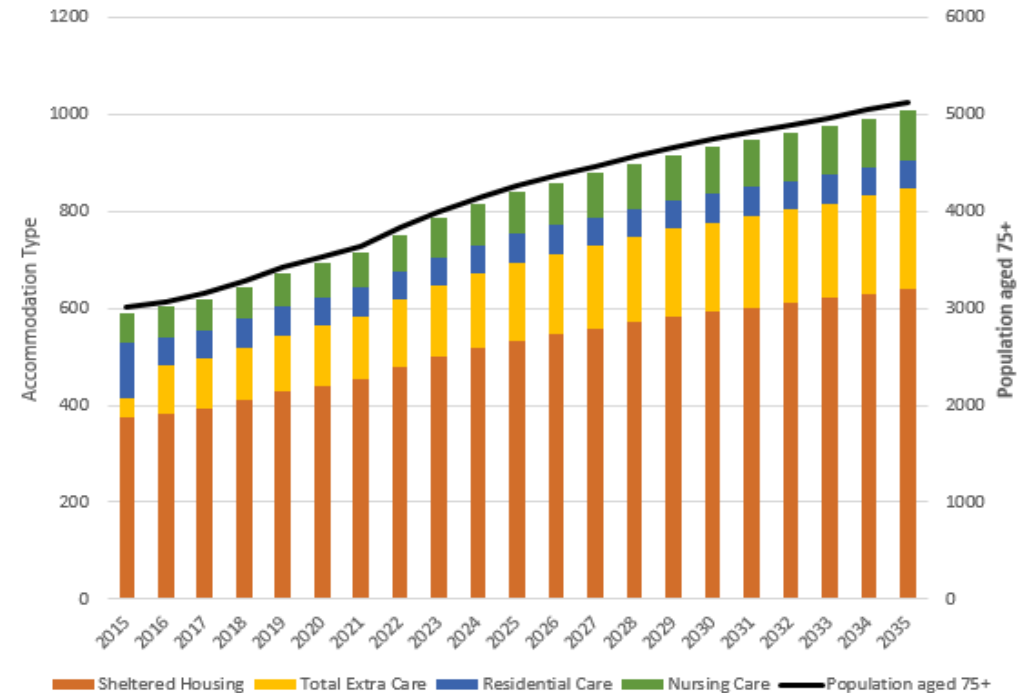


North Central Service Board Area and Population Aged 65 or over (2015)

### Our indicative commissioning intentions:

Type	Supply (2016)	Demand (2035)	Difference
<b>Sheltered housing</b>	384	641	<b>+257</b>
<b>Extra care</b>	99	205	<b>+106</b>
<b>Residential</b>	59*	59	<b>0</b>
<b>Nursing</b>	62**		

**Projected accommodation modelling:** This chart shows projected demand for various older people's accommodation in Powys, based on current estimated demand at 2016 and Welsh Government population projections



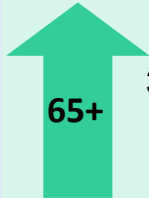


## Community area 4: Mid East Powys- Knighton and Presteigne

### Population Projections<sup>1,3</sup>

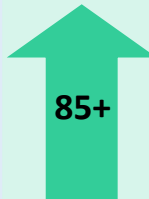


**4% population decrease by 2036**  
9,784<sup>1</sup> to 9,348



**38% increase (2036)**  
2,900<sup>1</sup> to 3,942

population



**139% increase (2036)**  
333<sup>1</sup> to 797

population

**Welsh speakers: 8.53%** (835 people)



**Dementia<sup>5,6</sup>**  
**77% increase (2036)**  
185 to 328 people with dementia

Created by Stephen Plaster  
Barn Wood Project

### Pressures and Supply<sup>19</sup>

Key measures:



**85+ population in 2036**  
**797 people**



**Delayed Transfers of Care (DTC)**  
Average number of people:  
**0.68**



**Residential EMI per 1000 75+ population**  
**3 beds**



**Nursing EMI per 1000 75+ population**  
**0 beds**



**Extra Care units per 1000 75+ population**  
**0 units**



**Sheltered housing per 1000 75+ population**  
**83 units**



**Distance travelled per 1000 75+ population**  
Residents placed >10 miles from original home  
**4 people**



**2 Care homes** located in the community area  
18 residential beds, 4 residential EMI beds



**Home Ownership of 65+ population<sup>9</sup>**

**91% of homes are owner occupied**

**Lone person households 65+<sup>7</sup>**

712 equates to 28% of households



**Unpaid Carers<sup>20</sup>**

13% of population (1,269 people)

Source: NHS for the Welsh  
and Health

**Domiciliary Care hours (week)<sup>21</sup>**

969 hours (100 per 1,000 population)  
66 clients

**Workforce**

9.6% (466 people) of working population work in the care and leisure industry

**Unemployment<sup>16</sup>**

0.9% of population (45 people)

**Disability living allowance<sup>15</sup>**

3% of population (310 people)

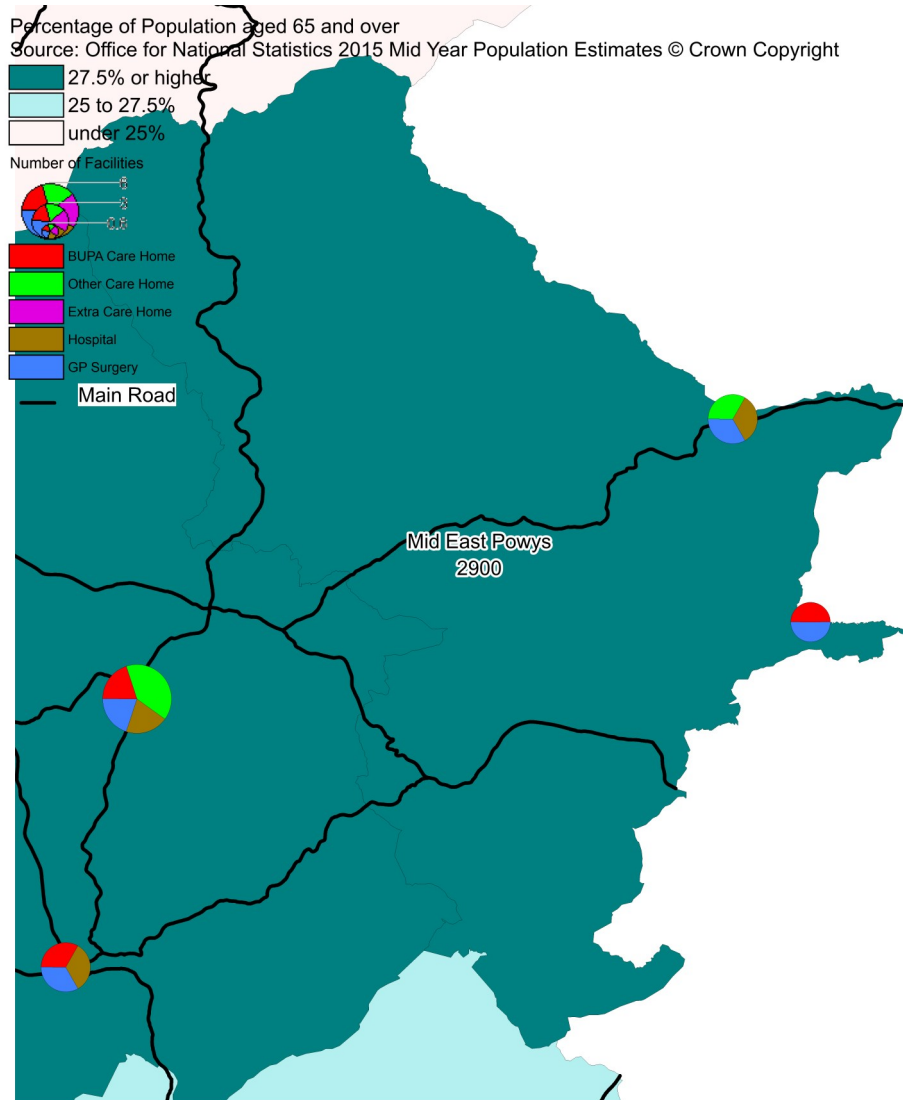


Map of Powys - Powys Council



## Community area 4: Mid East Powys - Knighton and Presteigne

This map shows the percentage of the population who are aged 65 and over and the services provided in this community area.

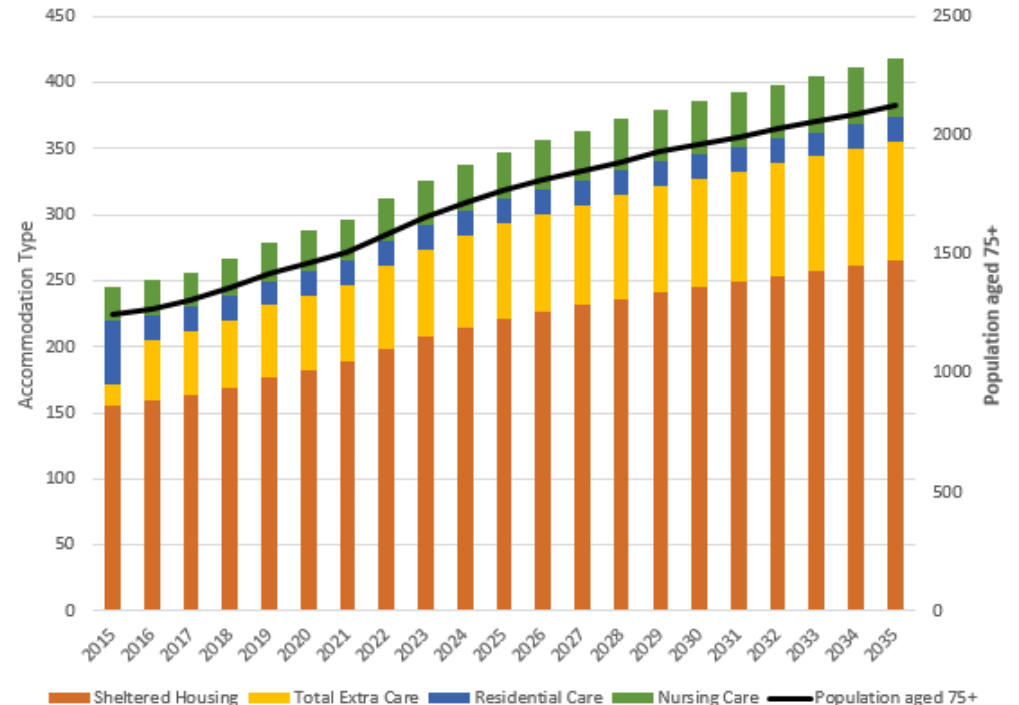


Mid East Service Board Area and Population Aged 65 or over (2015)

### Our indicative commissioning intentions:

Type	Supply (2016)	Demand (2035)	Difference
Sheltered housing	159	265	<b>+107</b>
Extra care	47	90	<b>+44</b>
Residential	19*	19	<b>0</b>
Nursing	26**		

**Projected accommodation modelling:** This chart shows projected demand for various older people's accommodation in Powys, based on current estimated demand at 2016 and Welsh Government population projections



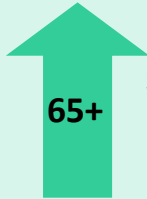


## Community area 5: Mid West Powys - Llandrindod and Rhayader, Builth and Llanwrtyd

### Population Projections<sup>1,3</sup>



**4% population decrease by 2036**  
19,505<sup>1</sup> to 18,688



population

**38% increase (2036)**  
5,528<sup>1</sup> to 7,689



population

**139% increase (2036)**  
784<sup>1</sup> to 1,876

**Welsh speakers: 25%** (2484 people)



### Dementia<sup>5,6</sup>

**83% increase (2036)**  
389 to 712 people with dementia

Credited to: Vaughan Pflieger from Neust Project

### Pressures and Supply<sup>19</sup>

#### Key measures:



**85+ population in 2036**  
1,876 people



**Delayed Transfers of Care (DTC)**  
Average number of people:  
1.79



**Residential EMI per 1000 75+ population**  
35 beds



**Nursing EMI per 1000 75+ population**  
7 beds



**Extra Care units per 1000 75+ population**  
0 units



**Sheltered housing per 1000 75+ population**  
97 units



**Distance travelled per 1000 75+ population**  
Residents placed >10 miles from original home  
4 people



**6 Care homes** located in the community area  
89 residential beds, 88 residential EMI beds  
24 nursing beds, 18 nursing EMI beds



### Home Ownership of 65+ population<sup>9</sup>

**95%** of homes are owner occupied

### Lone person households 65+<sup>7</sup>

1,488 equates to 31% of households



### Unpaid Carers<sup>20</sup>

**12%** of population (2,291 people)

Credited to: Mervyn and Brandy van Bruch Pappe

### Domiciliary Care hours (week)<sup>21</sup>

2,334 hours (120 per 1,000 population)  
171 clients

### Workforce

**10.9%** (986 people) of working population work in the care and leisure industry

### Unemployment<sup>16</sup>

**1.4%** of population (145 people)

### Disability living allowance<sup>15</sup>

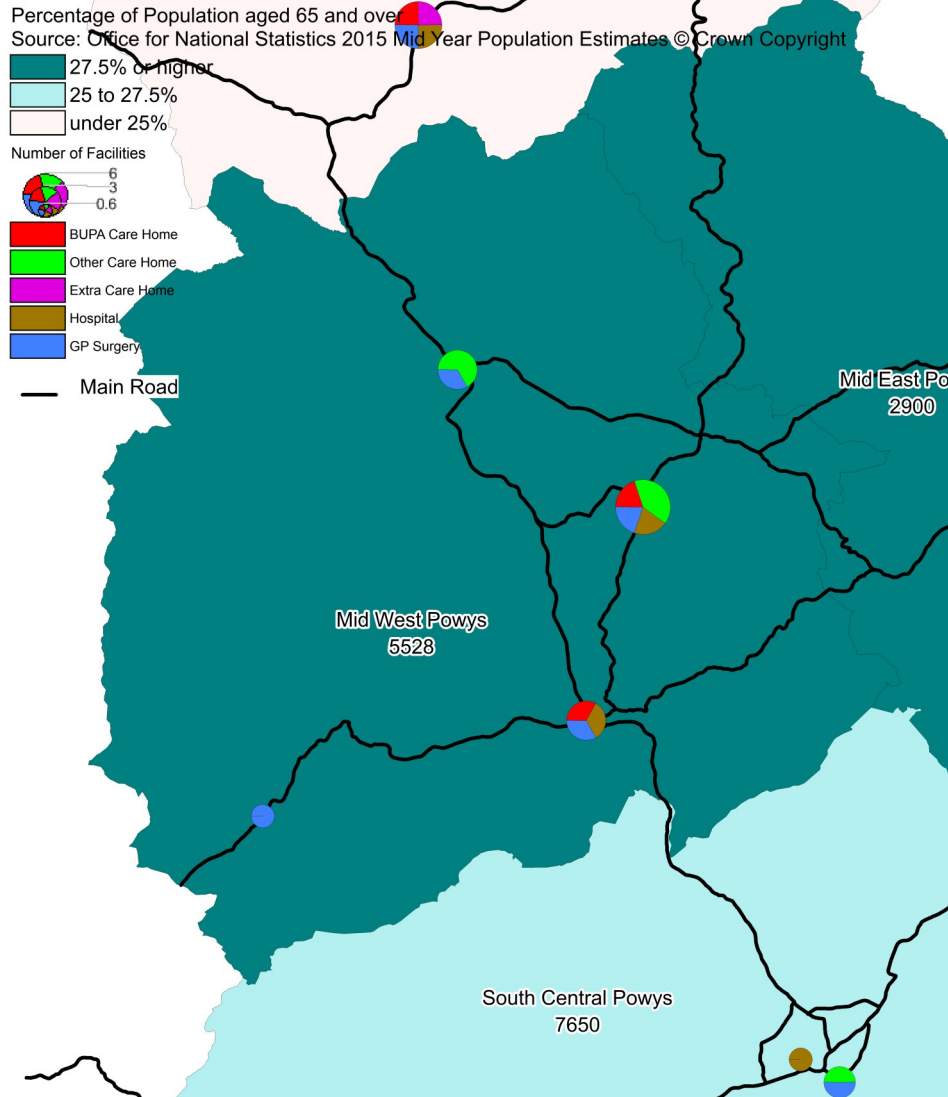
**4%** of population (815 people)





## Community area 5: Mid West Powys - Llandrindod and Rhayader, Builth and Llanwrtyd

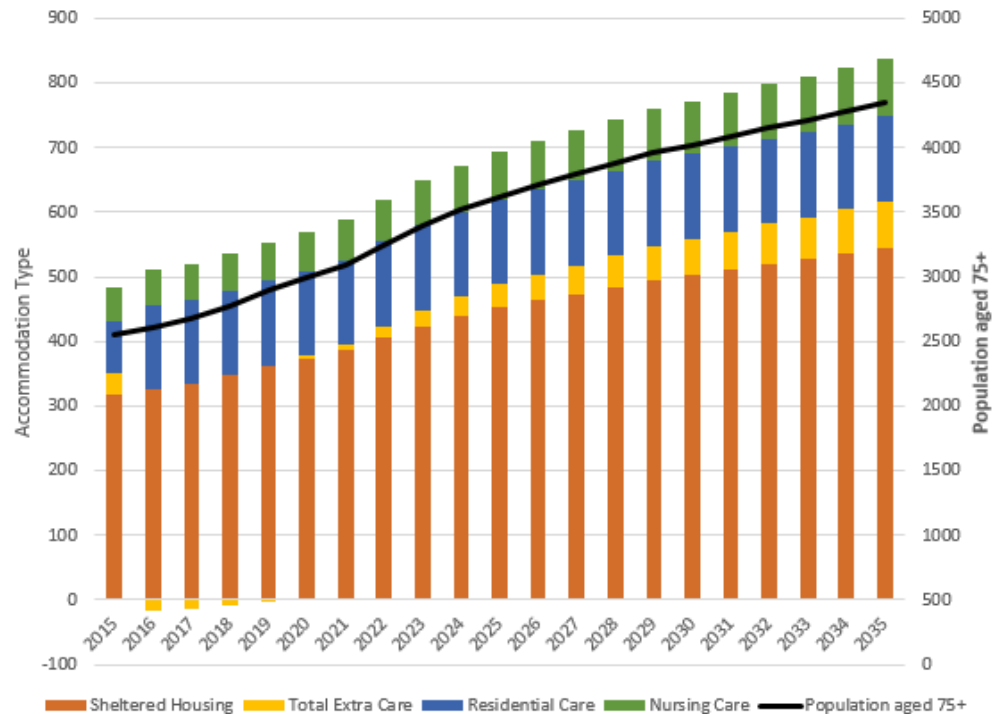
This map shows the percentage of the population who are aged 65 and over and the services provided in this community area.



### Our indicative commissioning intentions:

Type	Supply (2016)	Demand (2035)	Difference
Sheltered housing	325	544	<b>+218</b>
Extra care	-17	73	<b>+90</b>
Residential	132*	132	<b>0</b>
Nursing	53**		

**Projected accommodation modelling:** This chart shows projected demand for various older people's accommodation in Powys, based on current estimated demand at 2016 and Welsh Government population projections



Mid West Service Board Area  
and Population Aged 65 or over (2015)



## Community area 6: South Central - Brecon, Hay and Talgarth, Crickhowell

### Population Projections<sup>1,3</sup>



**6% population decrease by 2036**

29,658<sup>1</sup> to 27,847

**65+**

**38% increase (2036)**

7,650<sup>1</sup> to 10,529

population

**85+**

**139% increase (2036)**

989<sup>1</sup> to 2,366

population

**Welsh speakers: 12%** (3,505 people)



**Dementia<sup>5,6</sup>**

**81% increase (2036)**

511 to 922 people with dementia

Created by Proton Printer from Neuron Project

### Pressures and Supply<sup>19</sup>

Key measures:



**85+ population in 2036**

**2,366 people**



**Delayed Transfers of Care (DTC)**

Average number of people:

**2.88**



**Residential EMI per 1000 75+ population**

**17 beds**



**Nursing EMI per 1000 75+ population**

**20 beds**



**Extra Care units per 1000 75+ population**

**0 units**



**Sheltered housing per 1000 75+ population**

**144 units**



**Distance travelled per 1000 75+ population**  
Residents placed >10 miles from original home

**1 people**



**8 Care homes** located in the community area

92 residential beds, 55 residential EMI beds

29 nursing beds, 67 nursing EMI beds



**Home Ownership of 65+ population<sup>9</sup>**

**79% of homes are owner occupied**

**Lone person households 65+<sup>7</sup>**

**2,068** equates to 32% of households



**Unpaid Carers<sup>20</sup>**

**13% of population (3,715 people)**

Created by Neuron Project

**Domiciliary Care hours (week)<sup>21</sup>**

1,913 hours (64 per 1,000 population)

129 clients

**Workforce**

**9.5%** (1,408 people) of working population work in the care and leisure industry

**Unemployment<sup>16</sup>**

**0.7%** of population (110 people)

**Disability living allowance<sup>15</sup>**

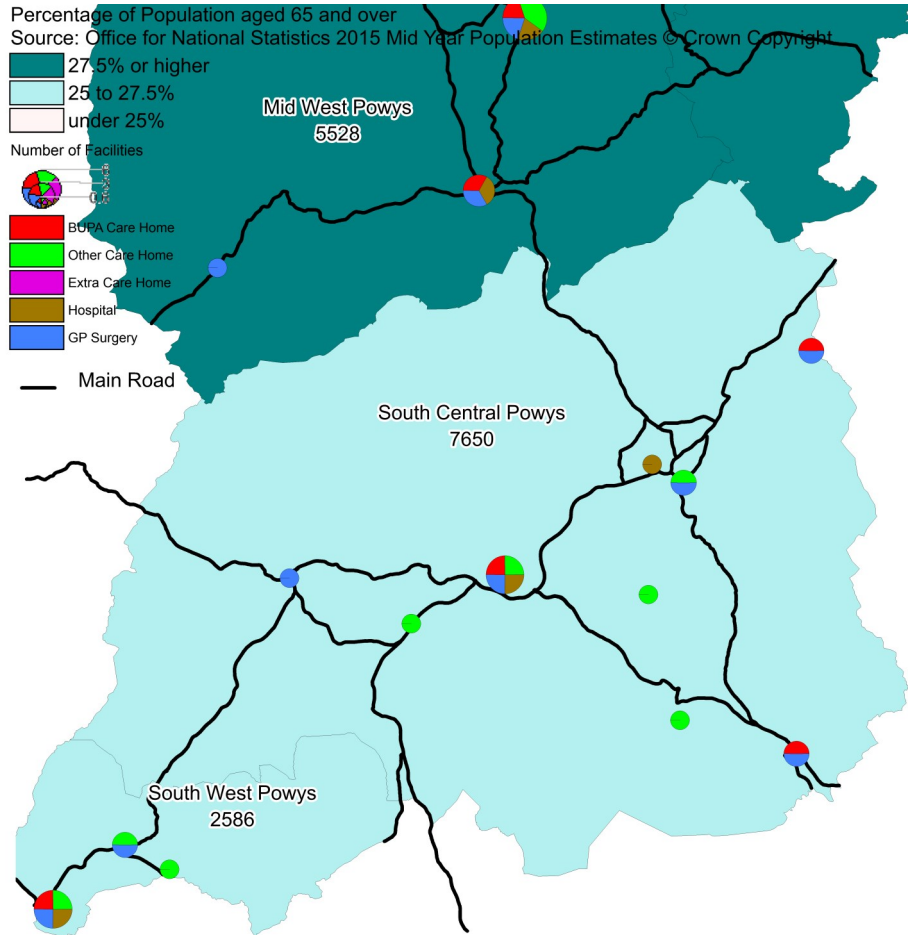
**4%** of population (**1085 people**)





## Community area 6: South Central - Brecon, Hay and Talgarth, Crickhowell

This map shows the percentage of the population who are aged 65 and over and the services provided in this community area in terms of care homes, hospitals and GP surgeries.

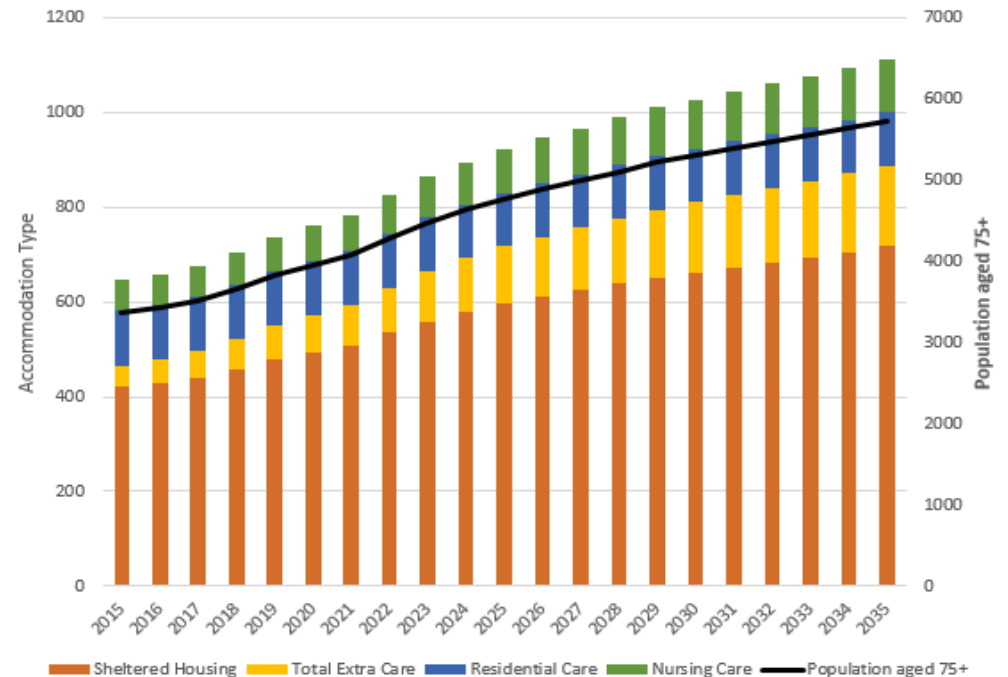


South Central Powys Service Board Area and Population Aged 65 or over (2015)

### Our indicative commissioning intentions:

Type	Supply (2016)	Demand (2035)	Difference
Sheltered housing	429	717	<b>+288</b>
Extra care	51	170	<b>+118</b>
Residential	114*	114	<b>0</b>
Nursing	65**		

**Projected accommodation modelling:** This chart shows projected demand for various older people's accommodation in Powys, based on current estimated demand at 2016 and Welsh Government population projections





## Community area 7: South West Powys - Ystradgynlais

### Population Projections<sup>1,3</sup>



**6% population decrease by 2036**

**10,107<sup>1</sup> to 9,500**

**65+**

**38% increase (2036)**

**2,586<sup>1</sup> to 3,590**

population

**85+**

**139% increase (2036)**

**361<sup>1</sup> to 864**

population

**Welsh speakers: 38% (3,875 people)**



**Dementia<sup>5,6</sup>**

**81% increase (2036)**

**190 to 344 people with dementia**

Created by Professor Prasher from Neuron Project

### Pressures and Supply<sup>19</sup>

**Key measures:**



**85+ population in 2036**

**864 people**



**Delayed Transfers of Care (DTC)**

Average number of people:

**0.44**



**Residential EMI per 1000 75+ population**

**29 beds**



**Nursing EMI per 1000 75+ population**

**27 beds**



**Extra Care units per 1000 75+ population**

**0 units**



**Sheltered housing per 1000 75+ population**

**218 units**



**Distance travelled per 1000 75+ population**

Residents placed >10 miles from original home

**1 people**



**4 Care homes** located in the community area

71 residential beds, 37 residential EMI beds

65 nursing beds, 34 nursing EMI beds



**Home Ownership of 65+ population<sup>9</sup>**

**86% of homes are owner occupied**

**Lone person households 65+<sup>7</sup>**

**806 equates to 36% of households**



**Unpaid Carers<sup>20</sup>**

**15% of population (1,531 people)**

Created by Mark Van der Bruggen for Neuron Project

**Domiciliary Care hours (week)<sup>21</sup>**

**945 hours (93 per 1,000 population)**

**75 clients**

**Workforce**

**12.8%** (549 people) of working population work in the care and leisure

**Unemployment<sup>16</sup>**

**2%** of population (115 people)

**Disability living allowance<sup>15</sup>**

**10%** of population (1040 people)

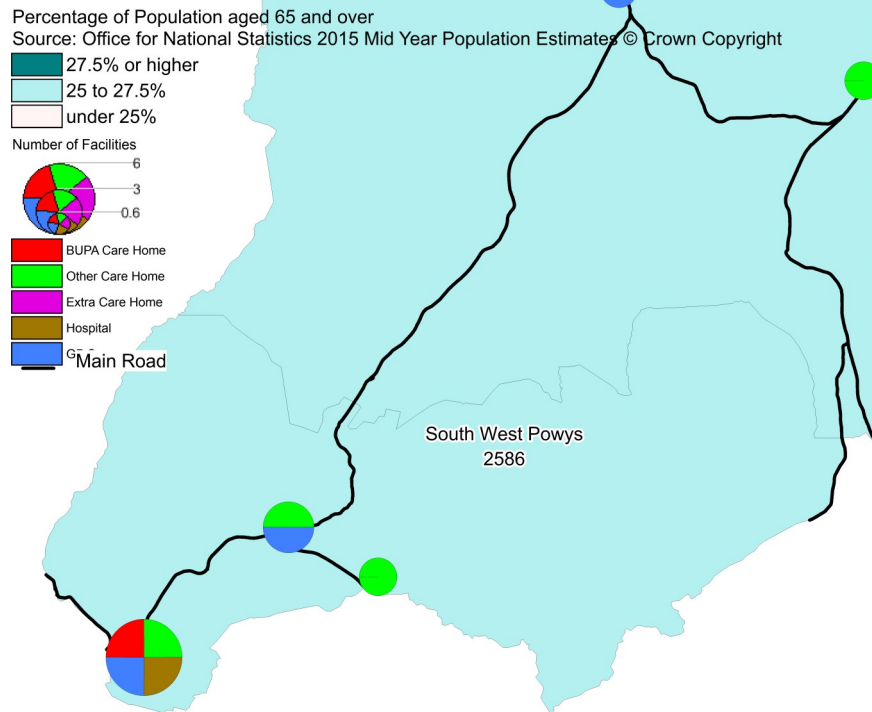






## Community area 7: South West Powys - Ystradgynlais

This map shows the percentage of the population who are aged 65 and over and the services provided in this community area in terms of care homes, hospitals and GP surgeries.

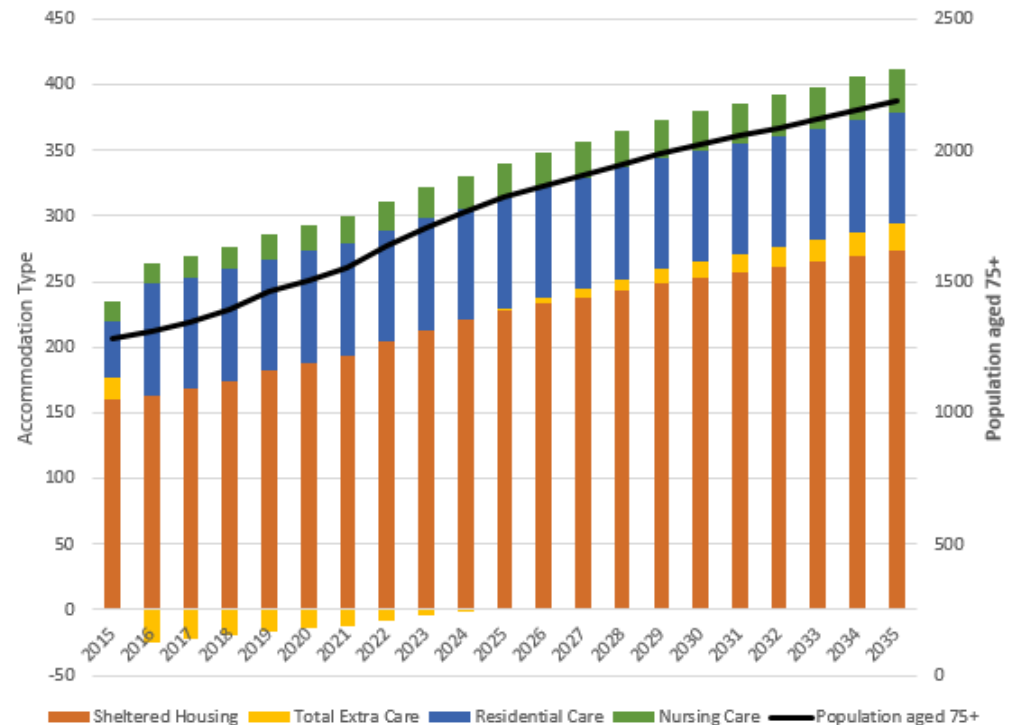


South West Powys Service Board Area and Population Aged 65 or over (2015)

### Our indicative commissioning intentions:

Type	Supply (2016)	Demand (2035)	Difference
Sheltered housing	164	273	+110
Extra care	-25	21	+45
Residential	85*	85	0
Nursing	16**		

**Projected accommodation modelling:** This chart shows projected demand for various older people's accommodation in Powys, based on current estimated demand at 2016 and Welsh Government population projections





## Workforce within the Powys care sector<sup>22</sup>

Many older people live in isolated areas outside of our main towns, therefore rurality presents a challenge for our workforce and the adult care sector.

We know we must attract and retain our health and care workforce to be able to sustain local services and that we need to think differently about how we achieve this, both by looking at alternative approaches to recruitment and by re-configuring our workforce which is out of date.

Alternative approaches to recruitment could include creating new incentives such as job opportunities for partners/spouses advertised as part of the recruitment campaign and/or opportunities to work with our partner organisations to jointly recruit staff across both our organisations, as well as affordable housing developments in Powys. There is also a broader consideration as to how we make Powys a more attractive place to live and work.

Nationally and locally, we know expectations are changing and there is a need to provide more local services 7 days a week and to extend some services into the evening. The future workforce configuration needs to ensure we have the right people, doing the right job in the most effective way. Integrating health and care and developing more generic roles, will enable us to reduce the current duplication in the system and ensure we add value to service users through a more co-ordinated approach.



**1,531 staff in post**

### Training

**11%** are working towards recommended/relevant qualifications (172 staff)

**59%** had recommended / relevant qualifications (900 staff)



### Staff retention and turnover

**31%** staff left the organisation (455 staff)

**During 2015...** **34%** staff were recruited (520 staff)

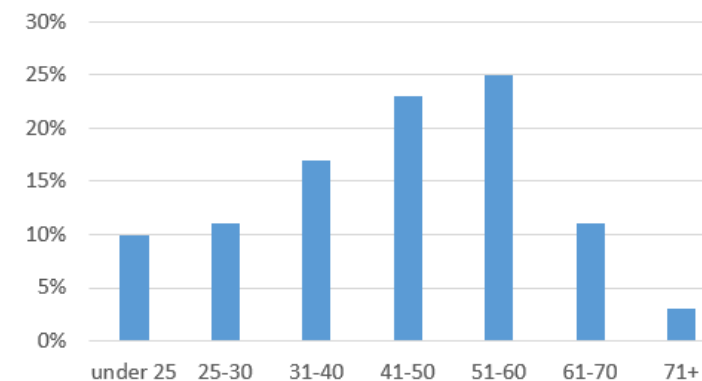
**40** vacant posts

## Employee Demographic



**Gender**  
**75% female**  
**25% male**

Age of workforce



### Staff working hours

**57%** part-time (less than 35 hours per week)

**43%** full-time (35 hours per week or more)



### Welsh Language

**131 staff** can communicate effectively through the medium of Welsh



### Disability

**26 staff** consider themselves to have a disability

All data is taken at 31 December 2015



## Finance

The cost of providing Powys County Council sheltered housing is contained within the Housing Revenue Account (HRA).

There is an aspiration to move from residential care to preventative community based services, in line with a strong strategic fit to the Powys Health and Care strategy, the Older Person’s commissioning strategy, and the Adult Social Care service improvement plan.

Financial savings of £1.3m have to be delivered in 2017/18 and in part expected to be achieved through new models of care to older people. In addition the longer term Medium Term Financial Plan has an expectation of additional savings through the accommodation strategy.

### Net Expenditure 2015/16 - Older People (Aged 65 and over)

	£000's
Nursing placements	2,479
Residential care placements	6,749
Direct payments	2,761
Home care	7,901
Day care	1,542
Equipment and adaptations	428
Other services for older people, including alarms and wardens	3,460
<b>Total</b>	<b>25,320</b>
(to be updated for 2017/18 net budget)	

### Data Gap:

Financial investment and priorities identified by Registered Social Landlords (RSLs), private developers and care providers.

### So what?

Collaborative working will be a necessity in respect of developments, capital funding and asset/land availability.

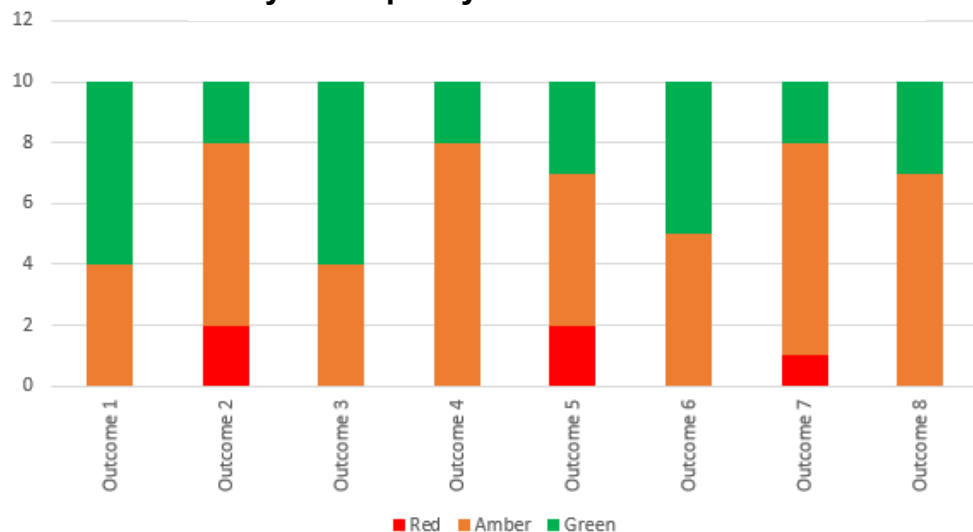
It is anticipated that there will be a shift in revenue spend from long-term care with reinvestment into preventative models.



## Quality of the local market

10 homes in Powys have been assessed using the Health and Social Care Contract compliance monitoring tool during announced visits by the Social Care Commissioning team.

### Analysis of quality in BUPA run care homes



To ensure that our care homes adhere to a set standard, we monitor eight outcomes:

Outcome 1: Choice of home	Outcome 5: Staffing
Outcome 2: Needs and preferences	Outcome 6: Management
Outcome 3: Quality of life	Outcome 7: Concerns and protection
Outcome 4: Care and treatment	Outcome 8: Physical environment

10 of our care homes were monitored and the majority of outcomes were deemed acceptable.

However three outcomes were highlighted as possible areas of concern:

1. needs and preferences, 2. staffing and concerns and 3. protection.

### Key:

**Green:** No concerns

**Amber:** Acceptable

**Red:** Possible area of concern

### Residents Questionnaire Summary

We asked **136 care home residents** their views on the care they received\*

- **All respondents** surveyed felt they were **involved in decisions** (either sometimes or always) and are encouraged and supported to do what they are able to do
- **97%** would **recommend their care home to others**
- **91%** felt they are always **treated with dignity and respect**
- **88%** said if they needed help **someone would always attend to them quickly**
- **99%** were **satisfied** with the **quality of food**
- **6%** were **unhappy with their personal care** and felt that is not carried out in complete privacy and in a sensitive manner
- **1.5%** felt they were **never spoken to in the language** of their choice
- **18%** had **concerns about the safety** of themselves or others

Financial year 2014/15

We are awaiting satisfaction survey results from our Tenants survey and this will provide information regarding perceptions of the quality of our housing stock.



## Appendices - Useful links and information

### Engagement Report

Findings from surveys and focus groups with the over 50 population and providers, identifying the future needs of older people

[Findings](#)

### Age-well

<https://www.agewelluk.org.uk>

### Regional Partnership Board

Further strategic documentation is available at:

<http://www.powys.gov.uk/en/adult-social-care/integration-of-health-and-social-care/powys-regional-partnership-board/>

### CSSIW Inspection Reports (council and care providers)\*:

<http://cssiw.org.uk/find-a-care-service/?lang=en>

### Housing Regulatory Opinion Reports\*

<http://gov.wales/topics/housing-and-regeneration/services-and-support/regulation/regulatory-assessments/?lang=en>

### Social Care Workforce Development Programme / Learning and Development:

<http://www.powys.gov.uk/en/training/training-learning-development/>

### Older People Commissioner

<http://www.olderpeoplewales.com/en/Home.aspx>

### Business:

For business support information: <https://businesswales.gov.wales/>

For business info: <https://www.growinpowys.com/>

\* For further information on care and housing providers in Powys, please follow the links.



## Forums / Partnership Meetings

### Care Provider Forum Events

Provider forum events will be held at 10am on the following dates at the Media Resource Centre in Llandrindod Wells, LD1 6AH:

14 February 2017

23 May 2017

08 August 2017

28 November 2017

27 February 2018

**Contact:**

Lee Anderson

[lee.anderson1@powys.gov.uk](mailto:lee.anderson1@powys.gov.uk)

### Strategic Housing Partnership Meeting

Housing meetings will be held at 10am—12.30pm on the following dates in Committee Room A, County Hall, Llandrindod Wells, LD1 5LG

8 March 2017

16 June 2017

20 September 2017

6 December 2017

**Contact:**

Terry Flynn

[terry.flynn@powys.gov.uk](mailto:terry.flynn@powys.gov.uk)



## References

1. Welsh Government 2015 Base Population Projections
2. Age UK Later Life in the UK, January 2015 factsheet
3. 2015 Mid-Year Population Estimate, ONS
4. Life expectancy, Public Health Wales Observatory, 2010-14
5. Estimated Dementia 30+ Powys Teaching Health Board, 2013
6. Dementia projections, Business Intelligence Team, 2017
7. Lone Person Households, Census 2011
8. Occupancy rating, Census 2011
9. Housing Tenure, Census 2011
10. Powys Projected Elderly Accommodation Demand by type, Business Intelligence Team, 2017
11. Self funders, Care Home Census, August 2016
12. Health Perceptions, Public Health Annual Report, 2013
13. 50+ participation in sport or activity, Stats Wales, 2008-09
14. Physical and sensory disability, Welsh Government, March 2016
15. Disability Living Allowance, Department of Work and Pensions, May 2016
16. Unemployment, Department of Work and Pensions, December 2016
17. Reablement, PCC Draig, August 2015 - 31st July 2016
18. Welsh speakers, Census 2011
19. Data taken from Community Area Matrix, Business Intelligence Team, September 2016
20. Unpaid Carers, Census 2011
21. Domiciliary Care, PCC Draig, August 2016
22. Workforce Data Collection, Local Government Data Unit, 2015
23. Quality of the local market, Commissioning Unit, 2014/15
24. Average DTOC per data report, 01/05/2015 to 11/02/2016
25. Fairer Charging Spreadsheet, 1 August 2015 - 1 August 2016
26. Sheltered Housing, Powys County Council, August 2016
27. Future accommodation needs, 50+ population engagement survey, Powys County Council, November 2016

### **Housing Lin strategic housing for older people (SHOP) tool:**

[http://www.housinglin.org.uk/Topics/browse/HousingExtraCare/ExtraCareStrategy/SHOP/SHOPAT/Dashboard/SHOPAT\\_beta/?](http://www.housinglin.org.uk/Topics/browse/HousingExtraCare/ExtraCareStrategy/SHOP/SHOPAT/Dashboard/SHOPAT_beta/?)

**For more information please contact Emma Palmer**

**Health and Social Care Change Manager**

**Emma.palmer@powys.gov.uk**

All Powys maps are subject to copyright

Additional information © Powys County Council 2017  
No additional copies should be made without the permission of the Council.  
Gwybodaeth ychwanegol © Cyngor Sir Powys 2017  
Ni ddylid gwneud unrhyw gopïau ychwanegol heb ganiatâd y Cyngor.