

Excerpts from the full set of slides which were used at Cordis Briefing on Thursday 18th October 2018. Full slides are available for subscribers.

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Cordis Briefing

October 2018

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Today's Briefing

- Introduction
- Brexit and the State of Social Care
- Local authority finances

BREAK

- ASC workforce and pay
- Lessons from Charities that have closed
- The Government's (non-)policy agenda for ASC

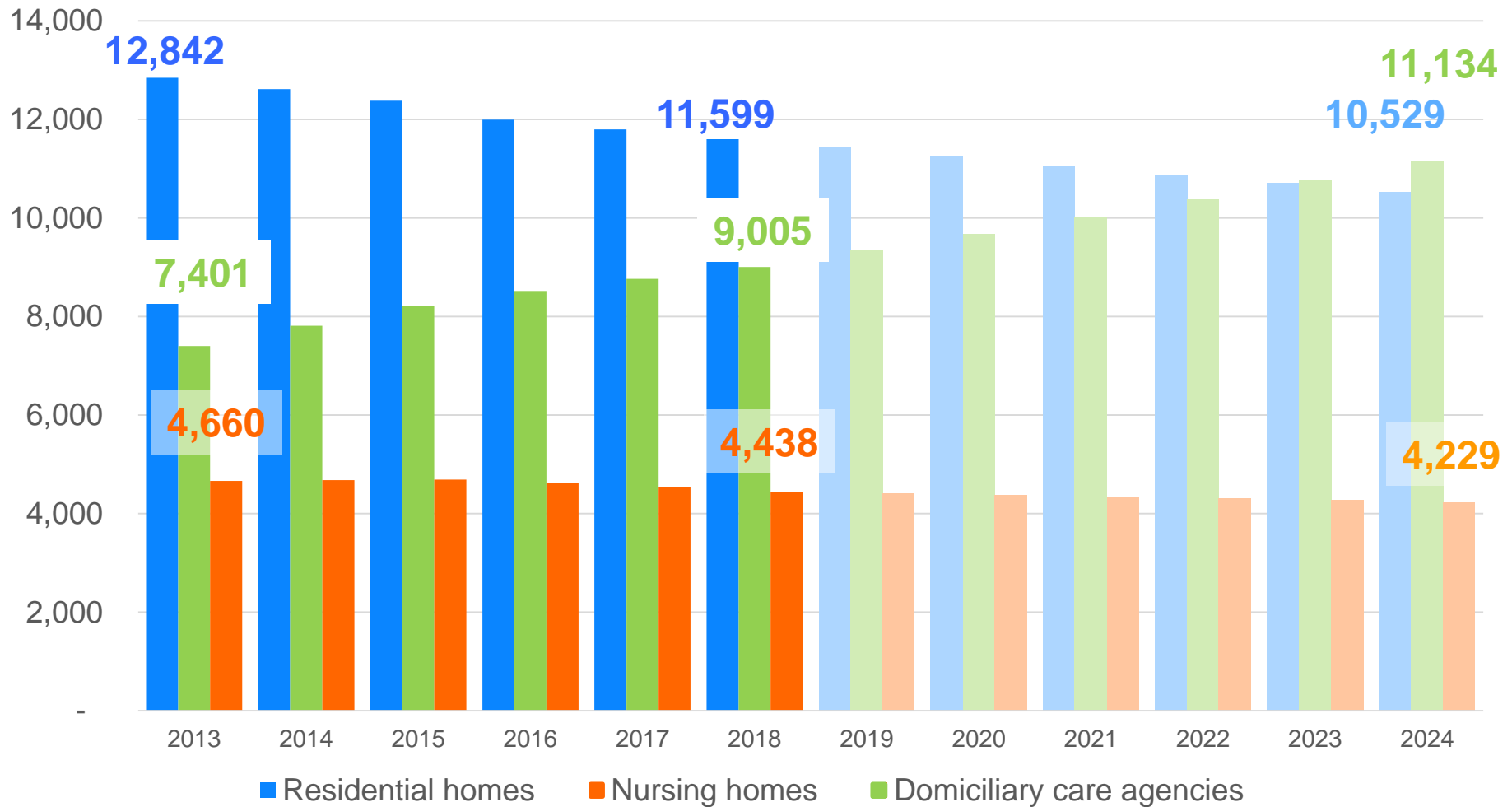
The state of health and adult social care in England 2017/18



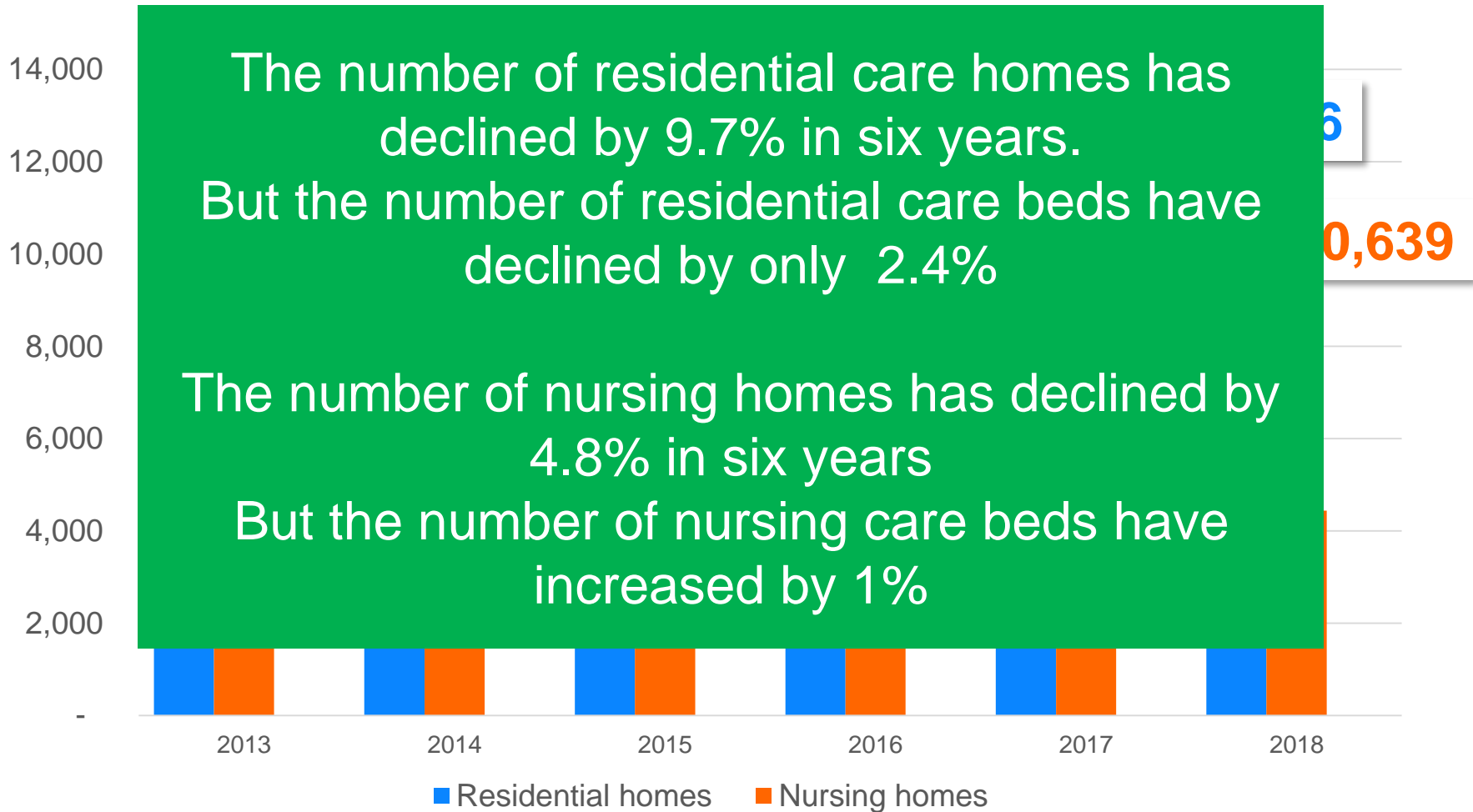
State of health and social care – key themes

- **Demand and capacity**
- Demand for care is rising inexorably - not only from an ageing population but from the increasing number of people living with complex, chronic or multiple conditions, such as diabetes, cancer, heart disease and dementia.
- More attendance at A&E
- Hugely uneven supply of nursing home beds – 44% increase in one authority area, 58% decrease in another
- 32% of Directors of Adult social care reported a Care home closure

Market trends



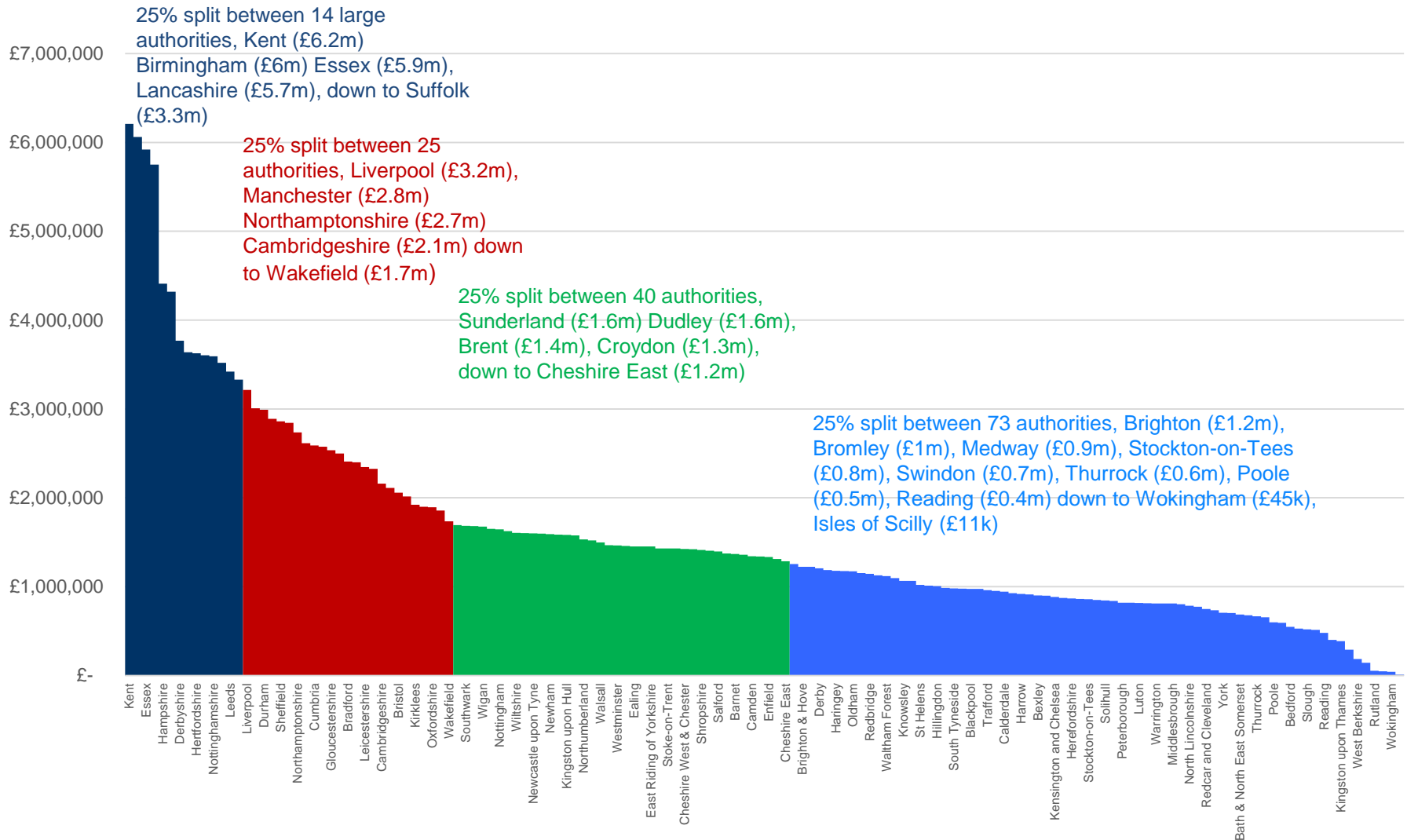
Market trends



State of health and social care – key themes

- **Funding and commissioning**
- Extra £20.5billion for the NHS by 2023/24 – Good
- No long term funding solution for social care anytime soon – Bad

Extra £240m for 'winter pressures' – allocation estimate



7 Break



Briefing Dates for 2019

- **Thursday 17th January 2019**
- **Thursday 30th April 2019**
- **Thursday 18th July 2019**
- **Thursday 17th October 2018**

Coffee from 10am for a 10.30am start

 Follow @CordisBright for social care news and information

Home care pay rates – original CB research

Home care pay rates – CB research

- Method:
 - Repeated research we did last summer: review of more than 1,000 care worker jobs advertised on TOTAL JOBS and INDEED in June and July 2017. Repeated again in July 2018.
 - Managerial positions not included.
- Methodological limitations:
 - Where wages were listed with only an upper but no lower bound, this is likely to have inflated our wage estimations. This affected some areas more than others: listings in the South West and the South East of England were most likely to not include a lower wage bound.
 - The 2017 and 2018 samples do not include the exact same care providers and jobs. Rather, it is a snapshot of the care jobs listed at that time.

Home care pay rates – CB research

- Unlike wage estimations on NMDS, this research builds a picture of the wages actually being advertised. This is a good indicator of current competition for workforce in the sector.

Home care hourly pay rates (as advertised July 2018)

Region	Av. lower bound	Av. upper bound	Av. mid point
South East	£9.75	£11.50	£10.62
London	£9.66	£10.99	£10.32
South West	£9.56	£10.97	£10.26
East	£9.14	£10.56	£9.85
West Mids.	£8.93	£9.80	£9.36
East Mids.	£8.88	£9.84	£9.36
Yorkshire & Humber	£8.81	£9.35	£9.08
North West	£8.50	£9.37	£8.94
North East	£8.59	£9.19	£8.89
Average – all regions	£9.09	£10.17	£9.63

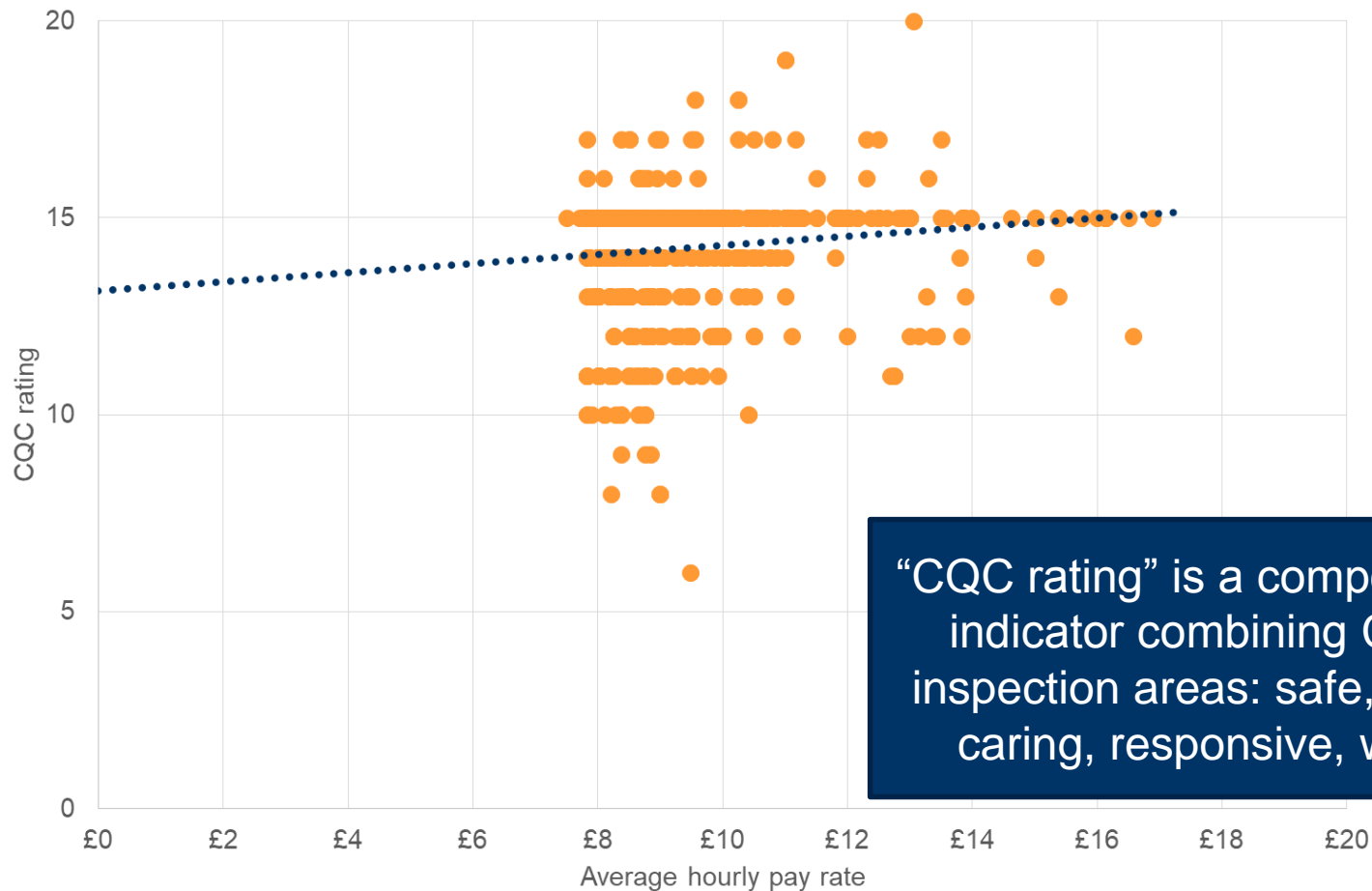
Review of more than 1,000 care worker jobs advertised on TOTAL JOBS and INDEED in July 2018

Home care hourly pay rates (as advertised July 2018)

Region	Av. mid point	£ above NLW	% above NLW
South East	£10.62	£2.79	36%
London	£10.32	£2.49	32%
South West	£10.26	£2.43	31%
East	£9.85	£2.02	26%
West Mids.	£9.36	£1.53	20%
East Mids.	£9.36	£1.53	20%
Yorkshire & Humber	£9.08	£1.25	16%
North West	£8.94	£1.16	15%
North East	£8.89	£1.06	14%
Average – all regions	£9.63	£1.80	23%

Review of more than 1,000 care worker jobs advertised on TOTAL JOBS and INDEED in July 2018

Relationship between home care provider's CQC rating and hourly pay rate offered to home care workers (July 2018)

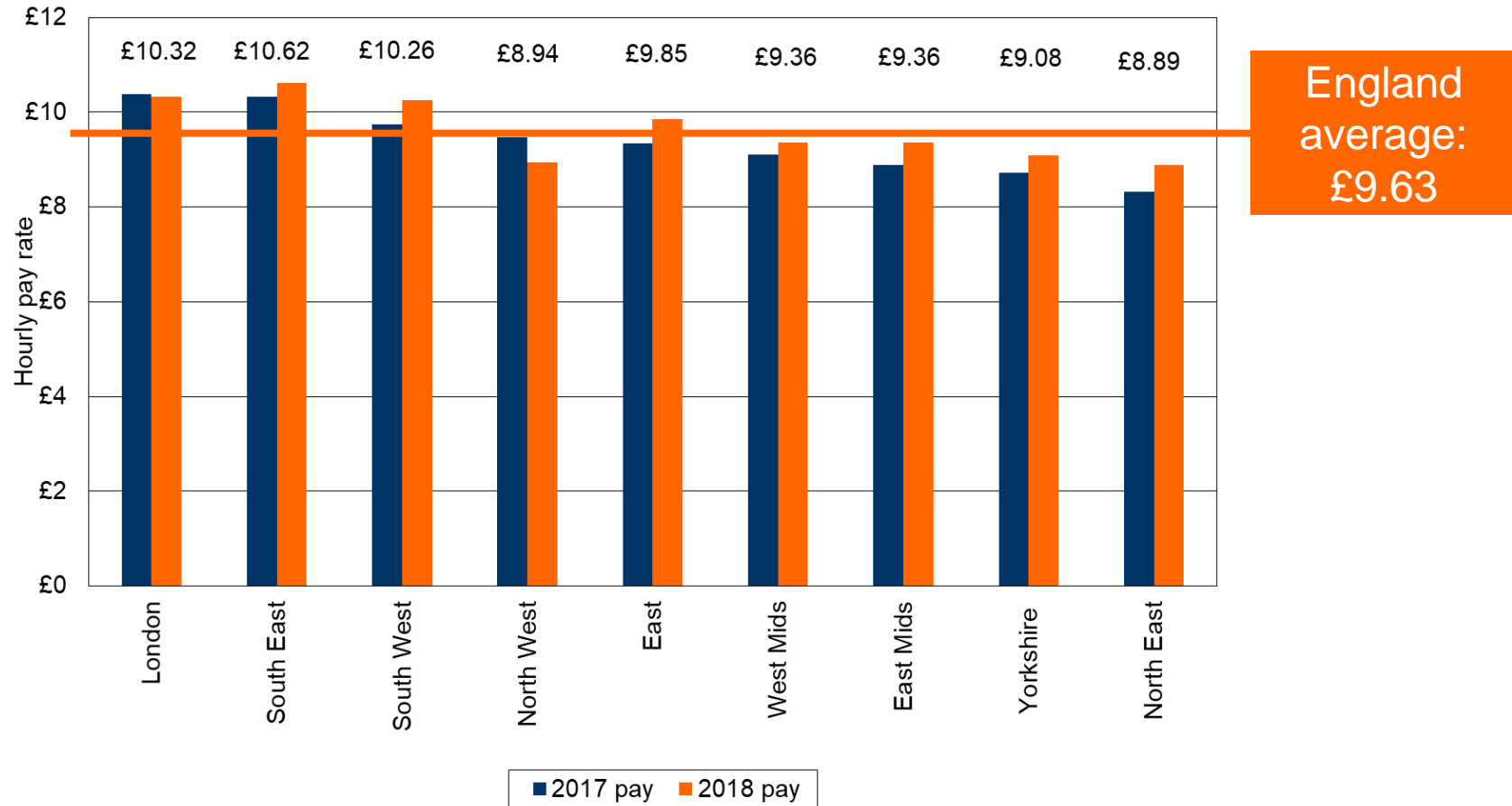


Change in home care hourly pay rates (as advertised June/July 2017 and July 2018)

Region	2017 av. mid point	2018 av. mid point	Change (£)	Change (%)
London	£9.97	£10.32	+£0.35	+4%
South East	£9.85	£10.62	+£0.78	+8%
South West	£9.23	£10.26	+£1.03	+11%
North West	£9.05	£8.94	-£0.11	-1%
East	£8.83	£9.85	+£1.02	+12%
West Mids.	£8.77	£9.36	+£0.59	+7%
East Mids.	£8.48	£9.36	+£0.88	+10%
Yorkshire & Humber	£8.46	£9.08	+£0.62	+7%
North East	£8.12	£8.89	+£0.77	+10%
Average - all regions	£8.97	£9.63	+£0.66	+7%

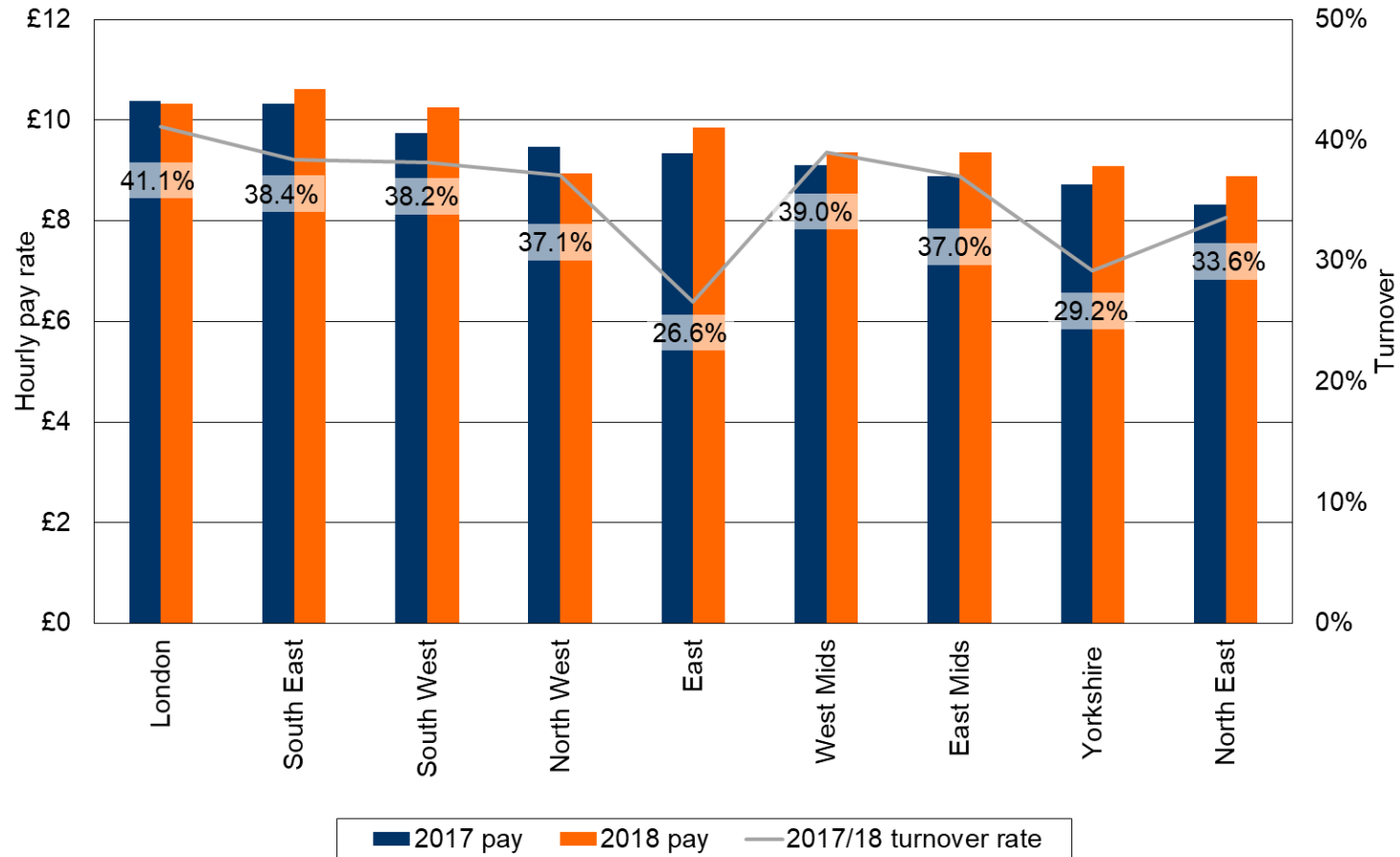
Review of more than 1,000 care worker jobs advertised on TOTAL JOBS and INDEED in June/July 2017 and July 2018

Change in average home care pay rate



Source: CB research June/July 2017 and July 2018

Change in average home care pay rate and turnover



Sources: NMDS-SC (domiciliary care, direct care only); CB research 2017 and 2018

In conclusion

- Home care pay rates appear to have increased (above rate of inflation) since this time last year.
- This suggests providers are having to compete harder for their staff - if providers don't raise wages, they might struggle to recruit.
- No strong link between rate of pay offered by organisation and CQC rating of organisation.
- No strong link between average rate of pay in a region and the turnover in the region. Must be other factors at play.



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