

Developing agreed ways to describe and kitemark' different models of housing with care for older people

Report of a 24 hour research and development workshop. 26 and 27 April at Jury's Inn, Birmingham

1. Background to the workshop and purpose

The research project behind the workshop and the people

The workshop was one of the outputs from 'Raising the Stakes' a research and development project funded by the Housing Corporation and CSIP (the Care Services Improvement Partnership, DH). The Raising the Stakes project aims to provide useful resources for the housing and care industry, older people and other customers about housing with care schemes, which currently have a range of terms, for example extra care, very sheltered housing, assisted living, close care, village and continuing care communities. In particular the work will result in:

- A new housing with care website (www.extracarehousing.org.uk). This is now up and running, in preparation for incorporating the other parts of the development project when they come to fruition
- New and clearer descriptions of individual schemes and services to enable both the industry and the public to be able to compare what different schemes and different types of schemes have to offer
- A voluntary kitemarking information system for housing with care schemes
- Guidance on Critical Success Factors in developing and running housing with care schemes

The project builds on previous work by representatives from the Extra Care Industry Forum to develop a common understanding. It also builds on previous work for the Housing Corporation to apply common descriptions for 'social' purpose designed housing and care services for older people.

A specially formed research and development consortia worked on Raising the Stakes and the members are: The Elderly Accommodation Counsel; Riseborough Research and Consultancy Associates; Peter Fletcher Associates Ltd; The Institute for Public Care.

The Raising the Stakes team running the workshop

The workshop was organised for the Raising the Stakes consortia by Moyra Riseborough from RRCA (Riseborough Research and Consultancy) and Peter Fletcher from PFA (Peter Fletcher Associates Ltd). Peter and Moyra led the work to develop the research and appraisal tools. Other people from the Raising the Stakes consortia who presented information and material at the workshop were John Galvin and Alex Billeter from EAC (Elderly Accommodation Counsel) and Deborah Clogg from IPC (Institute for Public Care).

People invited to take part in the workshop

A sample of 'experts' were invited to attend and work with us. The experts included older people with an interest in housing and care issues, senior officers from a range of commercial, not-for-profit and public organizations that provide housing with care buildings for older people and, commissioners and planners from local authorities. A list of attendees is provided in Appendix 1.

Purpose of the workshop

The workshop had three main purposes:

- 1) Informing participants of the work that the research and development consortia has been doing.
- 2) Testing out and refining prototype tools that are intended to benefit the housing and care industry and customers.
- 3) Exploring interest in developing an industry wide 'kitemarking' approach.

The programme for the workshop is provided in Appendix 2.

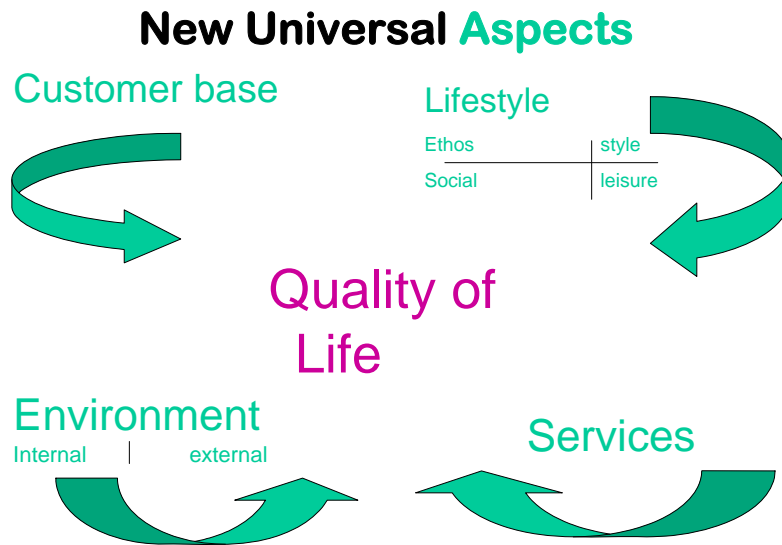
The prototype resources and tools

Three prototype tools were tested out with participants at the workshop

- A questionnaire, which was a refined version of the questionnaire the Elderly Accommodation Counsel (EAC) uses at the moment to collect data from housing and care providers.
- A template for writing a statement of purpose. This follows the practice for registered care homes, which are currently required by CSCI (the Commission for Social Care Inspection) to provide such a statement
- A self-assessment checklist. The self-assessment checklist is to help organisations improve the quality and content of the information they produce for potential consumers. It is intended to be part of an

organisation's work to make continuous improvements, something that modern organisations should all aim to do.

The questionnaire and appraisal tool are set out under four aspects or domains that sit within an overall, quality of life approach – customer base; lifestyle; internal and external environment; and services. These domains are set out in the diagram below



2. Workshop report

DAY 1 – 26 April 2007

Day 1 of the workshop:

- Set the background to raising the stakes – see introduction above
- Introduced the key concepts of the work – see presentation 1
- Introduced the concept of Critical Success Factors in developing and running housing with care housing and services for older people
- Explained the existing EAC website and questionnaires, and the plans to develop the website further
- Introduced the prototype tools

DAY 2 – 27 APRIL

- Identified key areas and questions to discuss in the groups

- Groupwork to gauge participant reaction to the prototype tools, and to discuss critical success factors in housing with care schemes
- Groupwork
- Plenary discussion and agreement and next steps

Feedback on the groups

Feedback from Groups on the questionnaire, self assessment checklist and statement of purpose

- Not a huge incentive for some providers if their allocations system is controlled through the local authority
- But good marketing tool and good for OP
- There was good support for the 4 aspects on which the material is built
- It was felt that the material links well together
- The groups provided practical suggestions for refining the Questions in the questionnaire
- Some gaps in the questionnaire were also identified = eg management information
- There was a debate as to how far the self assessment checklist should be about information or standards
- There was strong support for the statement of purpose

Feedback on Critical Success Factors (CSFs)

The areas to be addressed in relation to standards should be those that make the MOST DIFFERENCE in terms of outcomes for older people

- Use a simple approach: not too complicated
 - Could we use hotel symbols for facilities on site
 - Could one star provision

CSFs

- Ethos
- Sense of community
- Flexibility of care
- Involvement in decision making
- Outcome approach to care

Kitemarking

- A range of questions were addressed in the groups
- A key issue was whether there should be a 'threshold of entry' into any kitemarking system/club
- There was consensus on the format suggested
- There were many more questions/uncertainties about the use of outcome measures because of commercial sensitivities
- If stage 1 is only about "information" is kitemark the right word

More detailed information on the Kitemarking workshop is provided in Appendix 3.

First Plenary discussion after the groups on day 2

Kitemarking for information

The main debate was whether a kitemark should be about information only as a first stage or standards.

All participants supported the concept starting with a kitemark for quality of information - to give potential customers a good feel as to what an extra care scheme offers, using information on the domains and the statement of purpose.

Participants liked the example write-up that EAC had prepared about Rossiter Court as an imaginary extra care scheme. They would be happy to see their schemes described in this way.

One provider said that they would do it now as a marketing tool and liked the idea of the information being completed by residents so that it is their perspective that is at the forefront.

Kitemarking for standards

Some participants fully supported the idea of a kitemark for standards of extra care housing. They thought it would raise expectations and standards.

However, it was recognized that it was difficult to develop a kitemark for standards at a time when the market was still relatively immature, and where there are many different types and definitions of extra care on the market.

Retaining flexibility as the product evolves was seen to be very important.

There was a fear from some participants – social care commissioners as well as provider organizations - that development kitemarking for standards could open the door for more rigid regulation. There was a concern that too simple a way of making comparisons on services will lead to simple judgements/rationing of costs/funding.

The impact of a philosophy of maximizing independence

If extra care maximises independence, so one of the issues is the decreasing need for care/focus on care. There is a danger of over emphasis on this area.

Who is the kitemark for

An information kitemark may, in the short term be of more value for the private sector rather than the social housing sector. For the latter the product is rationed and consumer access is controlled by access systems agreed with social services.

What older people want

For older people looking for the right option for them there need to be categories and a 'search engine' to help people search for what they want/ask certain questions + relate these to them as a person.

Good information is important. It helps to narrow the search down to a shortlist from which one could visit schemes and make a decision on moving. Information needs to explain how one accesses certain services, for example care.

Older people need to know care and service costs + how they are worked out. Information could identify what things cost + different ways for people to pay them. Providers should say what their costs are and what they cover. There needs to be a relatively easy way to communicate this information to consumers.

Costs in the last 5 yrs could be presented, with average costs.

'Right Move' is a good example of how to set information out
The market could help to dictate/push organisations to publish their costs transparently.

Customer validation

There was some support for a system of customer validation. The customer wants to know 'does it have a good name'?

What is missing

Some people felt that a dimension of 'management' arrangements was missing from the quality of life framework, particularly in relation to ownership/freehold schemes. This would need to cover tenure and management rights/service arrangements. It might be part of narrowing search down. It might be part of the ethos. It might be part of the decision making process by the older person.

Jon H - need to capture costs that are 'different' – particularly in relation to housing with care – accountability responsible to providers – statement about own responsibility for what is provided.

Management philosophy – who provides what – all in house or not – information as well that customers need to know – particular issues for social commissioners. Discussion of above – strengthens need for clear information – will help educate commissioners.

Could kitemark promote transparency + quality of information on management particularly clarity/robustness of arrangements.

Second plenary discussion on day 2 – agreeing the next steps

1. Building a standard around information

There was a clear consensus about moving ahead to move towards an initial kitemarking system (or another suitable word) around information.

The system would be based on refining the prototype tools, based on the comments and ideas provided by participants at the workshop.

The next step would be to refine the tools. Some of the participants volunteered to support this process and offered to come together again.

The refined information would become the first stage of the kitemark process.

2. Moving on from quality of information to quality standards through a staged approach

Further discussion would be needed at another workshop or through the Industry Forum test further the appetite to take things beyond information, using a staged approach.

Kitemarking “Information” level?

OR

Kitemarking Trade Standards

Some people felt that there were a range of other inspection systems out there – e.g. CSCl for personal care; fire safety; environmental health

Others felt that unless quality standards were assessed the kitemarking system would not go far enough.

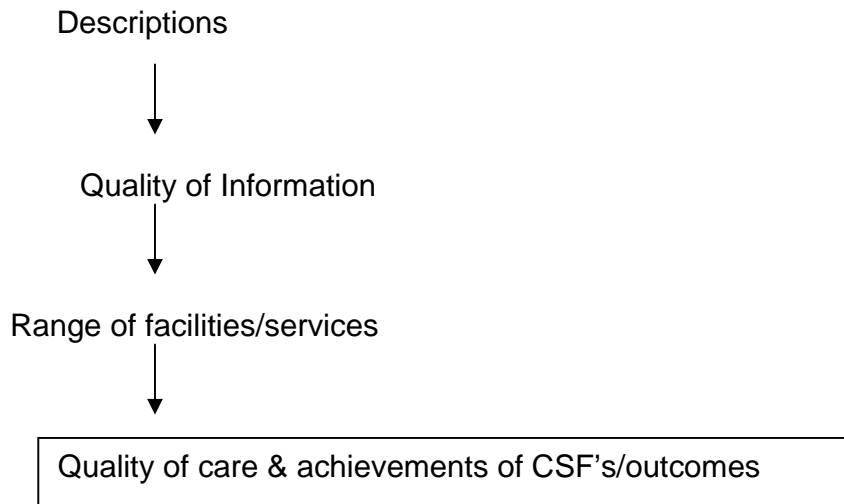
The current material is about inputs. If people wanted to move to outcome measures this would need work on:

- How to get there
- How to present information
- To whom?

It was recognised that extra care/housing with care came in many different shapes and forms.

Overall it was felt that this initiative would raise standard and be the foundation for information as to nature of service – a baseline kitemark.

STAGED APPROACH → 1st rung is of value in its own right



3. Paying for the next steps

Stage 1: Quality of Information – needs some development monies

- Providers
- JRF
- DH

Funding would be needed as it would not be commercially viable for EAC to start with, though it has commercial potential if there is wide buy in

Stage 2: Quality standards

- Could start with using hotel type symbols of facilities
- Not clear yet whether pump priming funding would be needed or whether providers will fund by paying as they go

Appendix 1

Participants List

Speakers in Bold

1.	Anne	Bailey	Wolverhampton City Council
2.	Alex	Billeter	Elderly Accommodation Counsel
3.	Bob	Bessell	Retirement Security Ltd
4.	Carmel	Brogan	Bristol City Council
5.	Deborah	Clogg	Institute of Public Care
6.	Peter	Fletcher	Peter Fletcher Associates
7.	John	Galvin	Elderly Accommodation Counsel
8.	John	Graham	The ExtraCare Charitable Trust
9.	Sally	Harvey	Abbeyfield Society
10.	Jon	Head	Hanover Housing Association
11.	Barbara	Hobbs	Raven Audley Court
12.	Ann	Hughes	Anchor Trust
13.	Paul	Jackson	Richmond Villages
14.	Chris	Lamb	St Helens MBC (or Les Bond)
15.	John	Lewin	The Stepping Stone Group Limited
16.	Steve	Ongeri	Independent Consultant
17.	Clive	Parker	Saxon Weald
18.	Meic	Phillips	Abbeyfield Society
19.	Jeremy	Porteus	CSIP Housing LIN
20.	Neil	Revely	North Yorkshire County Council
21.	Mark	Riddington	Peverel
22.	Moya	Riseborough	RRCA
23.	Kim	Scott	Places for People
24.	John	Timms	HicaLife
25.	Service user		Wolverhampton
26.	Service user		Wolverhampton

Appendix 2

REPORT ON THE KITEMARKING COMPONENT OF THE WORKSHOP

1. Do you agree with the idea of a kitemark for housing with care?

- Participants were in generally enthusiastic about the idea of a kitemark, although it had been expected by most, and hoped by a few, that the kitemark would be about minimum standards of facilities and services.
- One provider judged the kitemark valuable only as a first step towards the development of a trade association. A kitemark is like a hotel star rating which informs only on cost and facilities, but does not guarantee quality. A **trade association** would give confidence to consumers complies with standards that each scheme is visited each year

2. Do you agree with the proposal for a Mark for quality of information?

- The proposal seemed to make sense to all, although the need for basic standard of provision still remain high on the agenda of some, more specifically about 'extra care' as preferred by the Department of Health and the Housing Corporation.
- The remark under 1. (above) on the value of a kitemark as a first step towards the development of a **trade association** applies equally to a Mark for quality of information
- One participant remarked that the name 'Kitemark' (and other 'Mark' names) would be misleading, as it would be generally understood as referring to basic standards of provision, or to a code of practice. Even 'Quality of Information Mark' might not register in people's mind for what it is. A majority of the participants recognised the difficulty. It was also stated that if the proposed Mark was a first stage for a future Kitemark with basic standards of provision, the proposed name would be less misleading

3. How valuable do you think such a kitemark would be for your organisation?

- Most providers thought that a kitemark would become a valuable tool for marketing purposes, for supporting planning applications and for better information to the customers.
- Commissioners seemed to agree that the Mark could be of help in their commitment to implement strategies. They felt that it would help support

planning applications, defining what the basic standards of information should be.

- One provider stated that a kitemark would not make any difference as their schemes are fully allocated before completion and only to local people. However he would fully support the foundation of a trade association.
- This provider saw kitemarking helping make people – including planners and commissioners – more aware of ECH, i.e. to “support the development of a dynamic and sustainable ECH market” (to quote one objective of the project)
- One provider stated that waiting lists are full anyway and that the kitemark would raise profile and wrong expectations.
- A private provider stated that, once established and used by a few, the kitemark would become an essential requirement for all the industry.

4. Do you agree with the eligibility criteria, the basic definition of housing with care?

There was general agreement with the proposed threshold of entry **defining Housing with Care as**

- Housing designed with the needs of frailer older people in mind
- Offering security of tenure, i.e.: own front door and a legal right to occupy the property
- Facilitating the delivery of support and care services
- With communal and catering facilities

5. Do you agree with the proposed accreditation process for the kitemarking process?

- **Self-assessment** was not discussed.
- The completion of **questionnaires** similar to those used by EAC or proposed by the workshop seemed generally acceptable
- Submission of **supporting material** such as photographs, plans and brochure was also acceptable
- Submission of supporting information is less clear cut. Information on rent and leasehold is agreed.
- Clarity on **service charges** could also be met by all
- **Costs of care services** are much more difficult to present fairly. Not all providers would undertake to comply.

6. Could the accreditation process include compliance with appropriate codes of practice or other existing standards?

- The idea in principle seemed to be well received

7. Should the accreditation process include the use of outcome measuring tools?

- The idea is accepted by some and resisted by as many.
- One private sector provider was opposed to this proposal for reasons of commercial sensitivity and data protection issues.
- It may be that outcome measures would best be left out, at least at this early stage.

8. Ideas on financing the Kitemark?

- One provider suggested that EAC approach say 10 of the leading providers asking them to share these costs between them
- One provider suggested that the development of the project could be financed by a major institution (Department of Health, Housing Corporation), or the Joseph Rowntree Foundation which could see it as a natural development of their recent Literature Review by Karen Croucher (Housing with Care for Later Life)
- One commissioner stated that her local authority could only help with other resources or secondment, but not directly with cost
- One commissioner stated that his local authority would support the Mark's development financially. For a commissioner, the Mark would become a very important tool to support a commitment for implement strategies.

Conclusions: main considerations for the next step:

1. Name: Reconsider the name of a quality information mark
2. Two-stage development: is this a path towards kitemarking proper including standards of provision?
3. Finance: it appeared that it was too early to get commitments on financial support. The response would be clearer when the quality mark proposal is fully developed.
4. IGP grant: delivery of funders' requirements?
5. Self-assessment: where does it fit in the accreditation process?
6. Timetable for agreeing the basic questionnaire? John Graham's proposal to involve the users is difficult to fit within the project timetable
7. Outcome measures might start out as an optional component of the info Mark