

Same old, same old?

The ExtraCare Charitable Trust | Annual Review 2010-2011

Not if we can help it.



Better Lives for Older People

At ExtraCare this is the vision that drives us. We want to make it possible for all older people to live as part of an inspirational community.



About Us

At The ExtraCare Charitable Trust we've been creating better lives for older people for nearly 25 years. We're one of the most innovative providers of housing, care and support for older people, pioneering new ways of helping people live well in later life.

Our mission is to help give older people an independent, safe and secure future in our network of inspirational communities.

Our unique approach is helping people to stay active and independent for longer while living in their own homes - and providing real alternatives to residential and nursing care homes for those who need support as they age.



We currently deliver our services for over 3,700 older people in 11 retirement villages and 17 smaller housing schemes throughout the Midlands and the North.

We are dedicated to creating ExtraCare communities, places where older people can enjoy independence, choice and opportunity, as well as appropriate care, in the comfort and privacy of their own home. Our housing schemes were among the first of their kind in the UK and our retirement villages, with owners and renters side by side, have set new standards in affordable, high-quality housing provision for well over a decade.

Today we are continuing to push the boundaries, delivering our services to more older people from all walks of life. We want to influence policy makers' aspirations and challenge conventional ideas about what can be done to improve the quality of life for older people.



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Keith's Story

I was in a nursing home for 18 years doing absolutely nothing – now I'm here and I'm doing more or less everything. I feel like it's given me my life back. I'm a lot fitter now than I was 12 months ago I can tell you. I could hardly walk before, I was more or less always in my wheelchair. My health's improved 100% and I've started to walk about a bit now. I'm exercising three times a week on the exercise bike.

I feel good about being able to cook a bit for myself – just to be able to make a sandwich or a cup of tea if I want one. It makes you feel more independent – you don't feel useless any more.

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St. Oswald's Village, Gloucester



New Oscott Village, Birmingham



Shenley Wood Village, Milton Keynes



Pannel Croft Village, Birmingham

ExtraCare Housing and Villages

Recent years have seen a huge growth in specialist housing for older people, created by providers in the public, private and voluntary sectors. There is now a diverse range of provision and services and some confusion in the minds of older people and commissioners of services about what 'extra care' is, what a retirement village is, what they offer and who they serve.

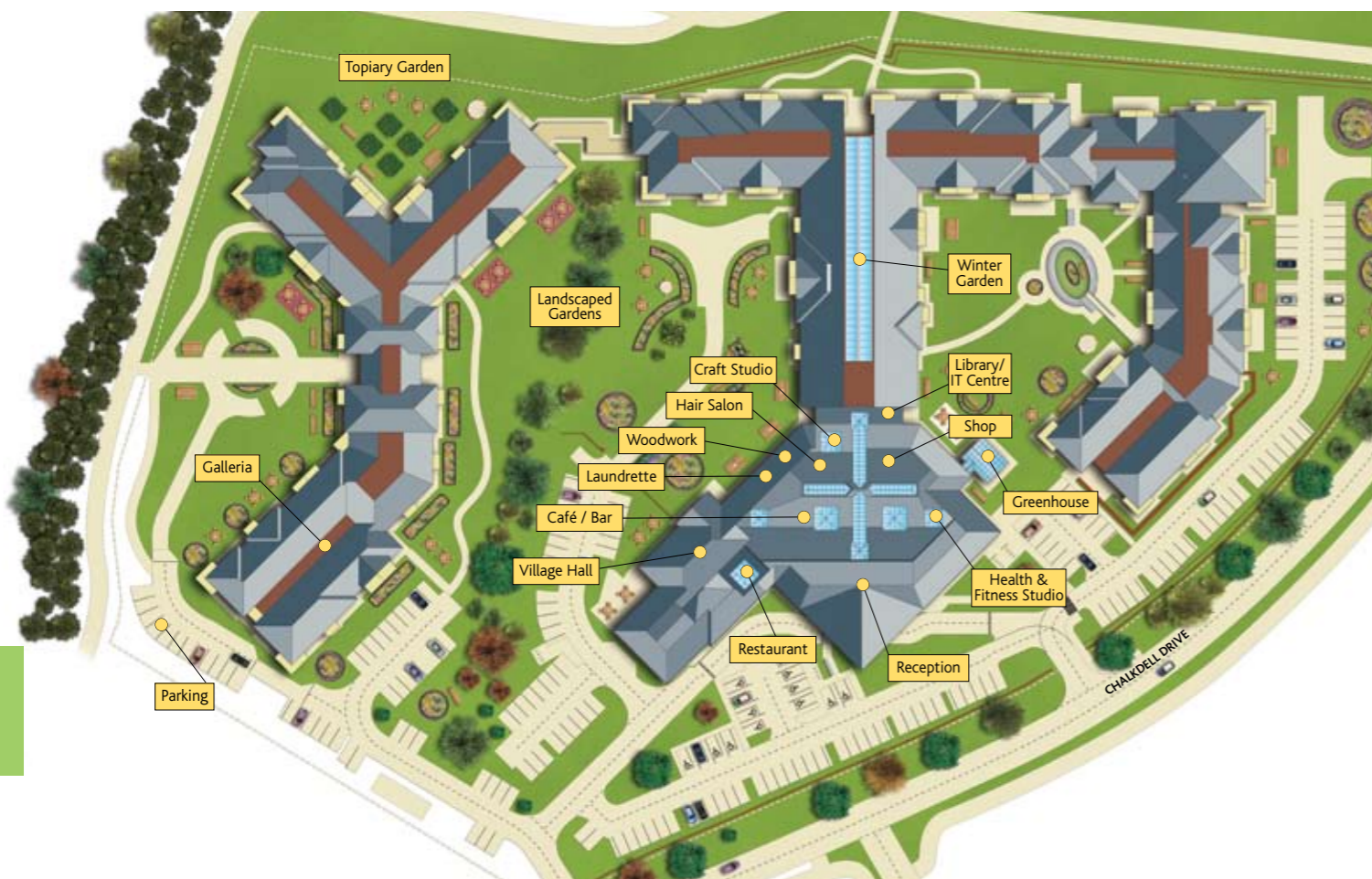
Our concept is unique in the UK and it's about so much more than housing. The ExtraCare approach integrates housing and care as well as access to preventative healthcare, advocacy services and opportunities to be part of an active and engaged community of friends and neighbours.

We've learned that the size of our village developments (90 – 300+ homes) means we can bring together a bigger and better range of facilities, services, partnerships and opportunities for the benefit of residents and the wider community.

All our communities are diverse and inclusive, with residents ranging from 55 and upwards, couples and singles, from people who are fit and well to others who need care. About one quarter to one third of residents in villages need care and we try hard to balance our communities in terms of care needs, age and gender.

We ensure that living with us is affordable for all, even for those who have only a minimum state pension. To make this possible all our developments offer a mix of social rent, shared ownership and purchase options. For the vast majority of older people our communities will offer a home for life.

Shenley Wood Village, Milton Keynes



Village progress

Demand for our services is very high with over 28,000 households throughout the Midlands and North expressing an interest in our local developments. We are keen to work with progressive partners to reach out to more older people and to continue to innovate and improve what we do.

In April 2010 we opened New Oscott Village in Birmingham in partnership with Birmingham City Council, Midland Heart and the Homes and Communities Agency. This £37m development is the first of at least five planned villages in Birmingham in partnership with Birmingham City Council. The Village offers 260 apartments, 182 of which are for social rent and shared ownership. In common with our other villages a wide range of on-site social and leisure facilities are accessible to the local community.

In October 2010 we opened St Oswald's Village in Gloucester in partnership with Rooftop



Pannel Croft Village, Birmingham - laying the foundation stone in 2011

Housing, Gloucester City Council, Gloucestershire County Council and the Homes and Communities Agency, providing 166 apartments and bungalows, 130 of which are for social rent or shared ownership.

Both villages, which opened during the financial year, are fully occupied and in common with our other villages are now maintaining waiting lists of older people in the local area. Our Welfare Benefits Advisors were active in both

areas, helping nearly 500 people find unclaimed benefits worth £0.7m. This has ensured that the move to each village has been affordable for new residents.

Construction also began on our second 180-home village in Birmingham – Pannel Croft in Newtown – which will open in Spring 2013. Work on a third Birmingham village – Hagley Road which opens in 2014 – has begun ahead of schedule.

ExtraCare is already an accredited provider of landlord services with the Tenant Services Authority and during 2012 we will apply for 'Registered Provider' status, which will enable us to own and manage social rented housing in our own right and to receive grants directly from the Homes and Communities Agency. This status will provide us with greater flexibility and responsiveness in addressing local needs.



New Oscott Village, Birmingham - opened in 2010



“ Our analysis, based on findings from the study, indicates that if the Enriched Opportunities Programme® is rolled out to all extra care homes in England, over a two year period the savings to the public through reduced inpatient care and less utilisation of more intensive housing care provision could be around £21 million. ”

National Audit Office
March 2010

Improving...

The Charity is regarded as a leading innovator in its field and in the course of the year several important new areas of work have crystallised.

Dementia and mental health

Our long-term dementia research partnership with Bradford University under the leadership of Professor Dawn Brooker culminated in the development and launch of our Enriched Opportunities Programme®, which provides support for residents who develop dementia or complex mental health issues.

Based on state-of-the-art research and expertise in dementia care the Programme is led by dedicated team members called EOP Locksmiths®, who work one-to-one with residents to develop tailor-made support and activities.

The findings of our pilot project showed that participants were 50% less likely to need to move from an ExtraCare setting to a care home, 42% less likely to need hospital care and are more likely to be positive about their quality of life.

As a result of a pilot study the Charity has extended the programme, which is funded almost entirely by charitable donations, to all its sites within the past 12 months. The Charity has also reviewed its admissions policy for potential residents with a diagnosis of dementia and will now consider each application on an individual basis.

Further care research is being commissioned during 2011/12 with Birmingham's Aston University. This is to establish the ongoing health benefits for our residents and the savings to the public purse.

Well-being

Our award-winning Well-being Programme led by dedicated Well-being Advisors is funded entirely through grant aid and charitable donations. It provides residents and older people within the wider local community with easy and approachable access to regular health screening as well as drop-in advice and information. 1,747 residents had a full well-being assessment during the year and the service resulted in an average 9.6% health improvement with areas of greatest improvement focused on heart and circulatory conditions, bladder and bowel health.

Our Fracture Free Project, funded by the Department of Health, is helping residents reduce the impact of a fracture by identifying those at risk of osteoporosis. The results to date show a 9% increase in GP intervention to treat the condition and prove that those residents who sustain fractures experience significantly better outcomes than the national average.



“ **May's Story**
Mum had been confined to bed for seven weeks, wasn't eating and was viewed as 'all needs, no mobility and ready to go to heaven'.

She came back to ExtraCare to be nursed in familiar surroundings and we were prepared for the worst. Six weeks later with the support of the Enriched Opportunities Programme® her transformation was incredible. The nursing care combined with the support of staff who had been trained to help people with dementia had led to a real change in her mental and physical condition. She was soon baking cakes, enjoying pamper sessions and taking part in craft classes. At the 12 week review Mum's social worker couldn't believe she was the same person. It was fantastic for us to see her smiling and enjoying life again. ”



...and Innovating

Finding a high quality affordable alternative to institutional care was the inspiration behind our first developments in 1988. As we've grown our residents have always been a leading source of inspiration and advice, helping us to innovate and improve our services.

Funding quality care and support

It is clear that the UK's current system of funding care for older people is unsustainable and what's more the quality of care available to many people is still inadequate. We don't believe we have all the answers, but we are seeking to find ways of addressing the issue of affordability and quality for the individual, society and the state.

Research with residents and potential residents in the areas of our villages has led to the development of a pilot 'Care for Life' product which is being market-tested with potential new home owners at Shenley Wood Village, Milton Keynes. The principle of this 'pooled risk' concept is to charge an affordable fixed payment in exchange for providing any future care a person might need. Payment for care can be made upfront or upon death from the proceeds of a resident's estate.

This is a unique concept in the UK and the results of the initial market-testing will inform the funding model used at ExtraCare's future villages.

Engaging with communities

Each ExtraCare village already has a Friends Club of local older people who can access social and leisure facilities, activities and events at the village in addition to our Well-being Services.

The Charity's partnership with Birmingham City Council is now extending the ExtraCare offering into the wider community through an outreach service to people living in their own homes within the City. Funded by Birmingham City Council, the service includes a home-based assessment of housing, safety and security issues, helping participants to claim financial support, improve safety and security in the home and access local activities and services, both at the ExtraCare village and in the wider area.

With at least five villages planned for the City in the coming years, the potential is for these sites to become community hubs, offering both services and outreach to older people in the surrounding areas.

Resident-led quality

One of the advantages of a diverse resident community is the ability to actively engage our residents in defining and improving quality. We routinely and regularly survey residents about all aspects of our service and target improvements based on the results. Our residents are also involved in benchmarking best practice both within and outside our sector so that together we can more clearly define high standards in activities, well-being, hospitality services and safety.

Almost 70% of residents participated in the last series of surveys and our challenging satisfaction targets have increased from 70 to 75% over the past year. This represents a 'Very Good' rating and is achieving our target for this year's surveys. We will be aiming to achieve further improvements in the coming year.



People make the difference

ExtraCare's developments may be impressive but it is the people who live and work in them that make them really come to life. Highly trained staff who share our values play a vital role in fostering a can-do culture at our housing schemes and villages. This supports our residents' personal achievements and independence.

Our people are the crucial factor in the delivery of our service and we are continuing to invest in them, seeking to ensure that ExtraCare is perceived by them as the best place to work with older people. All our frontline support staff need to achieve at least an NVQ Level 2 in Health and Social Care and over 93% of them reach this level within 9 months of starting.

Other members of the teams are also encouraged to achieve vocational qualifications and over 80% are qualified to NVQ Level 2 or above.

We have continued to improve our recruitment and induction processes during the year, ensuring that residents are actively involved at the heart of both areas. We have also introduced an Equality and Diversity Charter, recognising the growing diversity of our resident and staff populations. As a result of a number of measures our staff turnover continues to fall and our stability index, which measures staff retention, regularly averages 85%, with our annual staff turnover reducing year on year to 14.7%.

During the year we were also pleased to gain re-accreditation to the Investors in People standard, achieving the Bronze Level Award.



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Jean's Story
I was living on my own in a three bedroom council house and was struggling to meet the gas and electric costs through the winter. It got to the point where I was scared to turn the heating on. New Oscott Village looked fantastic, but I never thought I'd be able to afford to live there.

ExtraCare's Welfare Benefits Team helped me claim my entitlements and it turned out that I could afford to rent a place at the Village if I wanted to. Want to? Of course I did and it's the best move I've ever made. Now I've got a smaller place that suits me better and I know exactly what my costs are going to be each month. I know I can meet the payments comfortably and have a bit to spare, so now I can get on with life and enjoy playing with my grandson or volunteering on reception or in the bar. For the first time in years I don't have to worry about being cold or the red bills coming through the door and that's a real sense of relief.

“ Residents moving to The ExtraCare Charitable Trust's housing schemes and villages experience a 24% reduction in social care needs within five years. International Longevity Centre, September 2011 ”

Making a Contribution

ExtraCare derives its income through delivering housing and care services and raising charitable funds. We invest this income to create more retirement communities, to develop innovative new services and to cross-fund the housing, care and support of older people who would otherwise be excluded through poverty or ill health.

We are an efficient, well-run charity which spends around 20p on costs for every £1 of charitable income raised, compared to the national average of 25p.

Thanks to our volunteers, donors and the fact that there is a real demand for what we do, we managed to make a £3.5m surplus in 2010/11.

Our income 2010/11	£60.7m
ExtraCare housing sales	£22.9m
Operating income	£26.3m
Charitable income	£6.9m
Charity shops	£4.6m

ExtraCare charity shops

The provision of the activities which are a hallmark of our approach are partly funded by our chain of over 60 charity shops. During the year ExtraCare Shops Ltd opened four more shops and delivered a substantially higher surplus than the previous year, with a net profit of £0.7m donated to the Charity under Gift Aid.

Volunteers

Volunteers are another crucial element of support and we appreciate greatly the contribution made by over 4,000 volunteers who support our residents in activities and in running many of the libraries, coffee bars, activity clubs and shops. In 2010-2011 we estimate approximately 180,000 hours were worked on our behalf by volunteers.



Grants and donations

Key achievements in terms of voluntary and statutory fundraising in 2010/11 include:-

Grant-giving trusts

- £400,000 for Pannel Croft Village, Birmingham.

Homes and Community Agency

- £6.4m pledged for Pannel Croft Village, Birmingham.
- £4.875m pledged for Shenley Wood Village, Milton Keynes.

Department of Health

- £1.75m awarded to Pannel Croft Village, Birmingham.

St Oswald's Village Capital Appeal

- £377,000 gifted to provide Village Centre facilities.

Skills for Care

- £121,000 to support National Vocational Qualifications for staff.

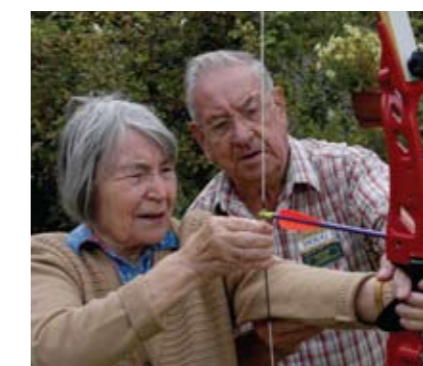


We need your support

The effect of the current economic situation on sources of statutory funding remains uncertain, but it is clear that it will be more important than ever in the coming years to demonstrate the benefits that can be achieved through our work in terms of savings to the public purse as well as improvements in people's quality of life.

We are therefore embarking on a three year longitudinal research study with Aston University to enable us to quantify the cost-effectiveness of the ExtraCare approach.

In these tough economic times we need your help more than ever before and we have over £30m worth of commitments for the coming year alone that we need to fund.



Every gift of charitable income will help us take a step closer to achieving better lives for older people.

If you would like to make a comment or support the Charity's work, please contact:

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Coventry CV3 2SN or email nick.abbey@extracare.org.uk

www.extracare.org.uk

Our commitments for 2011-12 include:-

- Building new Villages in Birmingham and Milton Keynes to provide over 700 homes which will be made available to those in need.
- Providing welfare benefits advice to older people in village development areas.
- Continuing to develop and deliver our Well-being Service and Enriched Opportunity Programme® across 30 sites.
- Extending the work of our outreach services to support older people in their own homes.
- Maintaining an exciting range of activities, learning opportunities and social events which will enhance the lives of our residents and inspire the communities in which they live.

Better Lives for Older People

A full copy of our Annual Accounts and our Five Year Strategy are also available on our website at: www.extracare.org.uk/about-extracare/reports-policies

If you would like a larger print version of this review please contact The ExtraCare Charitable Trust on **02476 506011**. Alternatively audio, Braille and other languages versions are available on request.



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