THE NATIONAL CARE FORUM

Personnel Statistics Report

survey of NCF member organisations

one of the largest workforce surveys in the care sector

July 2015




The National Care Forum represents not-for-profit care and support providers across the UK

together we have a stronger voice!

National Care Forum

personnel survey report 2015

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1. introduction

one of the largest workforce surveys in the care sector

The National Care Forum has now reported on workforce findings for twelve consecutive years. The high level of engagement by members reflects the value placed on it and its contribution to benchmarking. We are delighted that **75%** of eligible members returned the questionnaire and the information on which these findings are based covers a total of **64,896** staff, making it one of the largest workforce surveys in the care sector. The **60** participating organisations range in size from single facility operations to groups employing thousands of staff, all size groups are represented and we feel the response may be regarded as a good representation of the NCF membership as a whole and an authorative source of information. We are grateful for the continued support of members for the survey.

- **32%** employ **less than 300** workers
- **38%** employ **301 - 1000** workers
- **30%** employ **more than 1000** workers
- **7%** employ **more than 3000** workers

highlights at-a-glance		2015 survey
total staff		64,896
front line care staff	residential care workers and senior care workers as % of total staff	39.5%
	domiciliary care workers and senior care workers as % of total staff	11.9%
	nurses as % of total staff	3.2%
nurse salary	average nurse salary	£ 27,356
age profile	staff aged over 45	50.3%
	staff aged under 25	11.5%
vacancy rate	average vacancy rate as % of total days	7.6%
staff turnover	turnover of staff in residential care for older people	21.7%
	turnover of staff in Domiciliary care for older people	25.5%
	turnover of staff in residential care for younger/other adults	15.5%
	turnover of staff in supported living facilities	18.1%
	turnover of staff in day care facilities	14.1%
leavers	staff leaving within 12 months	30.7%
	staff leaving within 3 years	58.8%
sickness	sickness absence as a % of total days	5.0%
qualifications	care staff with relevant qualification level 2	72.5%
	managers with relevant qualification level 4	93.8%

2. results

Throughout the survey we have grouped staff by the settings in which they work. This page introduces the staff groups and provides a key for abbreviations in later sections of the report.

abbreviations key

HO	**staff working in the head or registered office** (which may be part of another facility)		
RES OP	**residential/nursing services** for **older adults** *facilities where services are mainly for residents over 65 years*	RES YA	**residential/nursing services for younger/other adults** *facilities where services are mainly for residents under 65 years***
DOM OP	**domiciliary services for older adults** *care-at-home services mainly supporting persons over 65 years*	DOM YA	**domiciliary services for younger/other adults** *care-at-home services mainly supporting persons under 65 years***
SL	**supported living services** *facilities for adults* with personal care needs (e.g. learning disabilities or particular health condition) to live in a supported environment*	DAY	**day care services** *centres and drop in facilities, includes day services within other facilities where staff are specifically employed as day care workers*
**e.g. adults with a particular health condition or support need which is not specifically age related* *(for example: sensory impairment, adults with learning disabilities)*		N	**number of participating organisations in each section**

size of participating organisations

Responses from **60** organisations cover a total of 64,896 staff employed. Table 1 shows the breakdown of respondents by size of organisation.

Table 1: organisation size

number of staff in organisation	2015	2014	2013	2012
up to 300	**19**	19	11	9
301 – 500	**6**	8	6	5
501 – 1000	**17**	10	9	8
1001 – 2000	**12**	15	12	11
2001+	**6**	6	6	7
NCF participants	**N = 60**	N = 58	N = 44	N = 40

skillsforcare define the size of an organisation as follows:

Small organisation: those employing 10 - 49 staff (3 in this survey)

Medium organisation: those employing 50 - 249 staff (13 in this survey)

Large organisation: those employing more than 249 (44 in this survey)

Most NCF member organisations are therefore defined as large employers with **58%** of those responding to this survey employing more than 500 staff.

staff employed in each care setting

All **60** organisations provided a breakdown of staff according to the settings in which they work. The number of staff in each setting and role together with the percentage this represents of total staff is shown in table 2.

Table 2: staff employed by group

			%	%	%
		number	2015	2014	2013
HEAD OFFICE	head office/admin staff	3,388	5.9	3.5	3.6
	training	136	0.2	0.2	0.2
	other	645	1.1	0.9	0.7
			N = 54	N = 47	N = 39
RESIDENTIAL OP	care worker	19,682	34.1	35.5	38.9
	senior care worker	2,320	4.0	3.6	4.8
	registered nurse	1,657	2.9	2.8	3.1
	supervisor	1,930	3.3	2.9	3.1
	registered manager	743	1.3	1.1	1.3
	dementia unit staff	1,537	2.7	-	-
	admin/office staff	1,019	1.8	1.7	1.6
	other	7,178	12.5	11.5	12.4
			N = 55	N = 51	N = 41
DOM OP	Care Worker	6,311	10.9	16.9	11.9
	Senior Care Worker	442	0.8	1.2	0.8
	Registered Nurse	56	0.1	0.02	0.1
	Supervisor	315	0.5	0.9	0.4
	Registered Manager	134	0.2	0.6	0.2
	Admin/office staff	327	0.6	0.6	0.6
	Other	275	0.5	0.7	1.0
			N = 34	N = 28	N = 23
RESIDENTIAL YA	Care Workers	668	1.2	2.1	3.5
	Senior Care Worker	82	0.1	0.2	0.4
	Registered Nurse	64	0.1	0.1	0.1
	Supervisor	55	0.1	0.3	0.1
	Registered Manager	35	0.1	0.4	0.3
	Admin/office	16	0.03	0.2	0.1
	Other	237	0.4	0.7	0.5
			N = 10	N = 9	N = 11
DOM YA	Care Worker	116	0.2	0.2	0.5
	Senior Care Worker	3	0.01	0.005	0.03
	Registered Nurse	-	-	-	-
	Supervisor	4	0.01	0.01	0.03
	Registered Manager	3	0.01	0.01	0.04
	Admin/office staff	-	-	-	-
	Other	1	0.002	-	0.1
			N = 4	N = 3	N = 6

		number	% 2015	% 2014	% 2013
SUP LIVING	Care Worker	5,530	9.6	7.8	6.8
	Senior Care Worker	302	0.5	0.4	0.3
	Registered Nurse	56	0.1	0.1	0.01
	Supervisor	351	0.6	0.3	0.2
	Registered Manager	371	0.6	0.6	0.7
	Admin/office staff	678	1.2	0.2	0.1
	Other	248	0.4	0.3	0.4
			N = 24	N = 22	N = 15
DAY CARE	Care Worker	487	0.8	1.0	0.6
	Senior Care Worker	37	0.1	0.2	0.1
	Registered Nurse	1	0.002	-	-
	Supervisor	74	0.1	0.1	0.1
	Registered Manager	28	0.05	0.05	0.1
	Admin/office staff	23	0.04	0.1	0.1
	Other	78	0.1	0.2	0.2
			N = 21	N = 20	N = 6

Total staff in this breakdown: **57,643**

Following reports of care staff working exclusively with dementia in our recent pay survey (November 2014), we added a category this year to record the number of staff working in **specialist dementia units**. However, several members responded to say that most dementia trained staff work across services, often working shifts within standard residential services and specialist dementia units in any given week, and so members were unable to provide a specific head count for this group. We therefore would caution that the 1,537 staff recorded for this group (2.7% of total staff) only represents part of the specialist dementia staff working across the membership and almost certainly does not provide an accurate picture of specialist staff within these organisations.

We noted a high number of '**other**' staff recorded in head office settings this year. These were queried and we note registered offices now incorporate personnel covering a variety of roles including:

- IT and technical support
- HR
- finance
- marketing
- fundraising
- volunteer management
- quality assurance
- compliance
- community services
- design and printing services
- transport
- catering

This is an interesting development which we believe probably reflects market changes and provider responses. The HR forum will consider how best to reflect these roles in future surveys.

nursing staff

Following recent work within the NCF Practice Forum, a new section was added to our survey this year to learn more about issues facing organisations employing registered nurses. The findings are shown in the section below and NCF will shortly publish a paper on the role of nurses in adult social care.

39 organisations reported to employ a total of **1,906** registered nurses providing 24 hour care for **6,353 nursing beds** and additional nursing support for homecare service users. An overview of provision is shown in Table A.

Table A: nursing provision

	total
organisations providing 24 hour nursing care	39
number of nursing beds provided	6,353
number of domiciliary users with nursing care *	106*
total nurses employed	1,906

*caution: several organisations were not able to provide the number of domiciliary (homecare) service users with nursing care, this figure should therefore be considered a minimum and we believe will be somewhat higher across the membership.

16 organisations reported they employ **specialist nursing roles**. These roles and the number of organisations offering these posts are shown in table B.

Table B: specialist nursing roles

organisations offering these specialist nursing roles	total
admiral nurse (specialist dementia nurse)	10
mental health nurse	4
palliative nurse (Princess Alice) end of life care	1
other*	3

*other roles reported include: well-being advisor, well-being clinical supervisor, practice development nurse

The recruitment and retention of nursing staff is clearly a significant issue for care providers. Our survey findings reflect the information highlighted in the Care Quality Commission State of Care report 2014. Turnover of nursing staff in our survey ranged hugely – from zero to an astonishing 83%. The majority of organisations showing zero turnover of nursing staff were notably from smaller staff teams. Table B shows the ranges reported for staff turnover, current vacancies and annual salary.

Table C: recruitment and retention of nursing staff

	min	max	average
turnover of nursing staff	0	83.0%	27.5%
vacancies as % of nursing staff	1.8%	75.0%	16.2%
annual salary for registered nurse	£22,651	£35,000	£27,356

The highest turnover rates were queried and several comments were noted in response. These reasons given for nurses taking up employment elsewhere were particularly resonant across organisations:

- "expectations very different from previous roles"
- "other employers paying more"
- "returning overseas"
- "increase in NHS nursing opportunities"

Having identified 4 respondents experiencing specific difficulties with turnover rates of more than 43%, the average turnover of remaining participants was found to be 23.2%. The NCF is aware of the particular challenges in the recruitment and retention of nurses in adult social care within our membership and across the sector overall. We will continue monitor the situation.

Salaries reported for registered nurse ranged from 22,651 to 35,000 per annum with a mean average of **£27,356**. While pay is not seen to be a major factor for the majority of staff leaving other roles in the sector (see page 12), salary does appear to affect retention of nursing staff in social care. On this occasion we found that the lowest rates of pay corresponded with the highest turnover of staff.

Table D: nursing staff turnover v annual salary

turnover of nursing staff	total nursing staff	current vacancies	salary
83%	9	1	**£22,651**
76%	66	11	**£24,000**
53.3%	20	10	**£27,270**
12.5%	16	2	**£35,000**
0%	11	-	**£28,568**

3 organisations commented that they have recently increased nurse salaries and improved staff benefits this year in order to attract and retain nursing staff. One organisation commented "this has been an enormous struggle for us over the last couple of years. This has impacted on agency spend" and attributed their low nursing vacancy rate to a new recruitment team with "one member of staff focusing on nurse recruitment". Another organisation reported to have "set up a special workforce to work on the issue of nurse recruitment".

Following a decade of detailed NCF pay terms and conditions reports, we are now able to compare the rates of pay for registered nurses across the membership over recent years.

Table E: pay rates for registered nurse

	min.*	**max.***	**average hourly rate £**	**average annual salary**
2015	**£ 22,651**	**£ 35,000**	14.03	**£ 27,356**
2014	£ 23,400	£ 33,540	**13.89**	£ 27,086
2013	£ 22,250	£ 29,894	**13.05**	£ 25,448
2012	£ 22,230	£ 30,537	**13.51**	£ 26,345
2011	£ 21,060	£ 30,537	**13.11**	£ 25,565

*annual salary calculated from hourly rates based on full time hours (approx. 37.5 hours per week)

In our 2014 pay report (November) we showed hourly rates offered for nursing posts across 8 regions in the UK. Table F shows the rates given for registered nurse and table G shows the rates given for nurses working nights only.

Table F: pay rates for registered nurse (2014)

	Lon	Mid	NE	NW	SE	SW	Wa	Sc	**Av £ /hr**
employers in region	10	14	4	7	19	13	1	1	
min. £ hourly rate	13.04	12.29	12.56	12.00	12.59	12.43	14.60	13.50	
max. £ hourly rate	17.62	14.81	14.60	13.68	15.94	14.60	14.60	13.50	
av. hourly rate	**15.65**	**13.70**	**13.47**	**12.68**	**13.86**	**13.58**	**14.60**	**13.50**	**13.89**

Table G: pay rates for registered nurse - nights (2014)

	Lon	Mid	NE	NW	SE	SW	Wa	Sc	**Av £ /hr**
employers in region	7	8	2	4	11	7	1	1	
min. £ hourly rate	13.28	9.22	12.56	9.22	12.20	12.97	15.22	13.50	
max. £ hourly rate	16.58	15.99	15.22	13.68	16.79	15.47	15.22	13.50	
av. hourly rate	**14.98**	**14.45**	**13.89**	**11.96**	**14.57**	**14.19**	**15.22**	**13.50**	**14.25**

Nurse salaries appear to have increased some 7% since 2011 which clearly demonstrates demand and supply variables having an effect in the care sector. The starting salary for a nurse in the NHS (2015-16) is £21,692 with an average salary, according the Royal College of Nursing, of around £26,000. More information can be found at the NHS Careers website: agenda for change

Our members report that there is no way in which current fee rates enable them to compete with the NHS. There has been considerable attention directed at staffing levels in the NHS within the last 12 months and in turn this appears to have impacted on both recruitment and retention of nurses to the adult social care sector. These pressures have led some providers to consider reducing their provision for nursing care. 7 organisations in the current survey (18% of respondents) have **considered de-registering** nursing care places. 1 reported to have already reduced their nursing care bed numbers. However another organisation (now employing 20 nurses) reported to have increased nursing beds in the last year. The responses are shown in the table below.

Table H: de-registering nursing beds

	considered reducing	already reduced	increased nursing beds	other comments
number of organisations	7	1	1	2*
*other comments	• "number of nursing beds available varies according to need" • "we have considered deregistering the nursing element of a service, however the loss of fees from the nursing element would make the service less sustainable in the long term"			

Recruiting nursing staff from overseas

Following a question in last year's survey, where 10% of participating organisations reported to recruit nursing staff from overseas we asked if members wished to see 'Nurse' added to the **UK Shortage Occupation list**.

More than two thirds of participants providing nursing care (26 organisations) with 134 current vacancies said they would like 'Nurse' added to this list. Comments on recruitment included:

- "could help with numbers but not sure if this will improve quality in our sector"
- "struggle to recruit, possibly due to the salary limitations and lack of progression opportunities"
- "recruitment agency dictate the market due to increased competition from other employers"
- "the skills of those that do apply are poor and they do not wish to take on managerial responsibility"
- "we have set up a special workforce to work on the issue of nurse recruitment"

All these topics will be considered further in our forthcoming discussion paper.

age profile of care staff and managers

A total of **57** organisations completed this section of the survey providing the number of staff within each care setting, according to their age. Table 3 shows the number of staff together with the percentage of total staff for each age group.

Table 3: age profile of total staff

	under 18	18 - 19	20 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
total number of staff	**99**	**838**	**4232**	**8403**	**8834**	**12529**	**8396**	**1750**
	%	%	%	%	%	%	%	%
% total staff 2015	**0.2**	**1.9**	**9.4**	**18.6**	**19.6**	**27.8**	**18.6**	**3.9**
2014	0.3	2.1	9.6	19.1	21.0	26.5	17.6	3.9
2013	0.3	2.2	9.6	18.8	19.6	27.5	18.1	3.9
2012	0.4	5.4	8.6	18.2	21.8	27.0	15.8	2.8

Our survey findings show a continuation of the trend seen in previous years with the largest number of employees now appearing in the **45-54 age group**, whereas the number of employees **under 20** appears to be down at just **2.1%** of the total workforce. Both trends represent a worrying development for the sector in both the short and the longer term.

The age profile of managers was detailed by **51** organisations. Table 4 shows the number of managers together with the percentage of total managers for each age group.

Table 4: age profile of managers

	under 18	18 - 19	20 – 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
total number of managers	**-**	**1**	**33**	**356**	**547**	**918**	**523**	**55**
	%	%	%	%	%	%	%	%
% managers 2015	**-**	**-**	**1.4**	**14.6**	**22.5**	**37.7**	**21.5**	**2.3**
2014	-	-	0.7	14.0	21.9	39.5	21.9	2.0
2013	-	-	0.9	13.7	24.1	35.9	22.9	2.5
2012	-	0.3	2.8	15.4	25.4	34.2	19.8	2.1

Managers aged 45-54 is again the largest group with those **over 65** years also showing a slight increase. This year is the first since 2011 to see an increase in **managers aged under 25**.

Table 5: percentage of staff in upper and lower age groups

2015	staff **over 45**	managers **over 45**	staff **under 25**	managers **under 25**
% total staff	**50.3**	**61.5**	**11.5**	**1.4**
2014	47.9	63.4	12.0	0.7
2013	49.5	61.3	12.2	0.9
2012	45.6	56.0	14.4	3.1

The results show more than half of the workforce are now aged over 45 and the number of staff aged under 25 has fallen for the fourth consecutive year to just 11.5% of the workforce. Table 6 shows the percentage of staff in each age group according to their work setting.

Table 6: percentage of care staff (by age group) working in each setting

	RESIDENTIAL CARE		DOMICILIARY CARE		SUPPORTED LIVING		DAY CARE	
age group	over 45	under 25	over 45	under 25	over 45	under 25	over 45	under 25
% staff 2015	**44.0**	**12.8**	**48.4**	**11.9**	**50.3**	**10.1**	**51.5**	**6.8**
2014	41.6	13.3	48.8	12.9	49.6	9.5	55.1	8.8
2013	43.8	13.0	47.7	14.4	49.7	8.2	56.9	6.4
2012	45.0	14.9	40.1	17.8	-	-	-	-

The only setting seen to be attracting younger staff in greater numbers is Supported Living, which shows a slight increase of 0.6%.

vacancy rates

The guidance for calculating the vacancy rates read as follows:

Calculate the average number of vacant staff posts as a percentage of the total staff posts within your organisation. e.g. if you had 2 vacant posts (out of a total of 50 posts) 2/50 = 4% vacancy rate

A total of **43** organisations provided vacancy rates ranging from **0%** through to **45.0%**, with a mean average of **7.6%**. 1 organisation (with fewer than 100 permanent staff) reported zero vacancies and 3 organisations showed staff vacancies of less than 1%. The results are shown in table 8.

Table 8: vacancy rates

	% 2015	% 2014	% 2013	% 2012
min. rate recorded	**0**	0	0	0.8
average vacancy rate	**7.6**	**6.0**	**5.5**	**5.9**
max. rate recorded	**45.0**	24.0	22.0	16.0
	N = 43	N = 40	N = 36	N = 28

The highest vacancy rates, at an astonishing **45%** and **43.19%** of total staff, were queried to find a recent financial review had identified a large number of vacancies, as yet to be recruited, that were being covered by bank and agency staff. With these organisation figures recorded separately, the average of rate given by remaining participants was **5.6%** in keeping with averages reported in recent years.

turnover rates

Turnover information for permanent employees in each care setting was provided by **60** organisations. The range of responses with minimum, maximum and average turnover for each setting are shown in Table 7.

Table 7: staff turnover rates

Setting		2015	2014	2013	2012
HO	range min (5 reported zero)	**0**	0	0	0
	mean average	**13.4**	**13.1**	**9.9**	**11.6**
	range max	**40.0**	50.0	30.0	36.2
		N = 43	N = 41	N = 32	N = 36
RES OP	range min	**3.3**	2.0	4.1	8
	mean average	**21.7**	**18.4**	**17.3**	**19.6**
	range max	**40.0**	50.0	43.0	36.2
		N = 46	N = 45	N = 35	N = 35
DOM OP	range min (2 reported zero)	**0**	0	4.1	1.4
	mean average	**25.5**	**22.1**	**29.9**	**27.7**
	range max	**55.0**	54.0	50.5	50.6
		N = 25	N = 25	N = 17	N = 15
RES YA	range min	**6.5**	5.8	6.5	5.4
	mean average	**15.5**	**15.5**	**15.0**	**14.9**
	range max	**23.0**	20.0	26.0	36.2
		N = 10	N = 8	N = 8	N = 15
DOM YA	range min	**1.0**	-	0	6.9
	mean average	**18.4**	**17.4**	**7.3**	**15.9**
	range max	**28.6**	-	14.0	36.2
		N = 4	N = 1	N = 3	N = 9
SUP LIV	range min (1 reported zero)	**0**	0	0	
	mean average	**18.1**	**9.5**	**13.6**	
	range max	**55.0**	23.9	30.5	
		N = 22	N = 19	N = 11	
DAY	range min (4 reported zero)	**0**	0	0	
	mean average	**14.1**	**15.6**	**7.2**	
	range max	**37.9**	50.0	21.4	
		N = 18	N = 14	N = 11	

Since our 2014 survey, all care settings show increased average staff turnover rates with the exception of day care operations. However individual responses record some positive change with one member commenting their turnover rates had come down from last year's 50% to around 10% *"and we can feel the difference! So can the service users!"*

Again we see something of a link between smaller staff teams and lower turnover. Some groups recorded **zero turnover**, in particular 4 organisations reported zero turnover for day care staff teams of fewer than 12 people.

The highest rates of staff turnover are shown in domiciliary (homecare) and supported living services where 3 organisations reported turnover which has risen to more than half of their staff.

Whilst we acknowledge that the issues driving staff stability and continuity in the care sector are complex, by making comparisons with the data shared in our recent pay, terms and conditions survey (November 2014) we note that the highest turnover rates (over 45%) for the homecare group were reported from organisations paying reduced hourly rates for travel time between homecare visits. Notably the highest turnover rate reported (77%) was from an organisation offering National Minimum Wage and no rate paid for travel time between visits (at November 2014).

Clearly staff stability remains a continuing challenge for employers and we will continue to monitor this issue through our surveys and engagement with members.

leavers: analysis

A total of **55** organisations were able to provide the percentage breakdown of personnel leaving post, according to length of service. The findings for a total of **12,273 leavers** are shown in Table 9.

Table 9: leavers according to length of service

% of total leavers in	% 2015	% 2014	% 2013	% 2012
non-starters	1.3	1.1	1.5	1.0
0-3 months	10.1	14.3	12.5	8.7
4-6 months	8.7	9.6	9.4	10.7
7-12 months	11.9	14.9	10.5	11.2
1-2 years	28.1	26.7	24.3	25.5
3-5 years	19.4	18.5	23.8	23.8
6-10 years	12.7	8.9	10.9	12
10+	7.7	6.1	7.1	7
	N = 55	N = 49	N = 42	N = 37

Table 10 shows the average leavers according to length of service across all care settings.

Table 10: leavers according to length of service (all care settings)

% of leavers in	% 2015	% 2014	% 2013	% 2012
under 12 months	30.7	38.8	32.4	30.9
0-2 years	58.8	65.5	56.7	56.7
3-5 years	19.4	18.5	23.8	24.1
5 years +	20.5	14.9	18.0	19.2

Table 11: leavers according to each setting

	RESIDENTIAL			DOMICILIARY			SUP LIV			DAY CARE		
% of leavers	2015	2014	2013	2015	2014	2013	2015	2014	2013	2015	2014	2013
under 12 months	30.8	36.1	30.4	33.1	47.4	40.7	24.8	30.3	28.3	14.1	23.8	11.9
0-2 years	60.6	63.3	56.8	58.8	73.5	61.0	52.7	59.4	52.8	38.4	40.6	30.5
3-5 years	18.4	19.4	22.9	22.3	17.1	28.5	20.6	20.3	20.8	24.2	22.8	25.4
5 years +	21.0	17.4	20.4	19.0	9.5	10.5	26.7	20.3	26.3	37.4	36.6	44.1

Findings appear to show a more positive picture this year with a greater share of personnel having remained in service for more than 2 years and 1 in 5 leavers (20.5%) having worked for the organisation for more than 5 years.

However we still see more than half of staff (58.8%) leaving in the first 3 years in post and almost a third (30.7%) leaving in their first year and we still appear to know far too little about where they go and why.

reasons for leaving

This section was completed by **51** organisations with information detailing **10,490** leavers. Table 12 shows the main reasons given for leaving by care workers (ranked in order with comparisons to previous years).

Table 12: reasons for leaving as % of total leavers

	number	% 2015	% 2014	% 2013	% 2012
personal reasons	2713	25.9	25.0	19.8	13.3
career development	989	9.4	9.1	3.2	4.2
dismissal	989	9.4	9.1	7.8	8.7
competition from other employers	870	8.3	7.1	6.5	3.4
retirement	487	4.6	4.5	3.9	4.0
ill health	432	4.1	4.0	4.5	4.9
career change	400	3.8	1.1	1.1	0.9
nature of work	319	3.0	2.9	3.4	3.6
redundancy	305	2.9	2.8	2.4	1.6
relocation	289	2.8	2.7	3.4	3.8
conditions of employment	187	1.8	1.7	2	1.9
pay	155	1.5	1.4	2.6	1.8
death	27	0.3	0.2	0.3	0.6
unknown/other	2328	22.2	26.1	40.1	48.3
total leavers	10,490	N = 51	N = 49	N = 40	N = 32

Personal reasons (25.9%) remains the top reason given for leaving a post. **Career development** has risen to second place with significant increases over recent years and **competition from other employers** has increased again to rank in fourth place, now showing more than double the percentage recorded in 2012.

Perhaps another indication of an ageing workforce **retirement** and **ill health** now feature in the top 6 reasons for leaving.

Although **pay** as a stand-alone reason for leaving remains low in the rankings, the significant rise in competition from other employers may lead us to consider pay to be a contributory factor. We also note that **pay + nature of work + conditions of employment** taken together represent **10.1%** of the known reasons for choosing* to leave a post (*excluding reasons beyond the control of the leaver e.g. dismissal, retirement, redundancy, ill health). In fact such career related factors appear to account for some 25% of reasons.

We are pleased to note that more members this year were able to record reasons within the categories shown. However, a significant proportion of the results (22%) fall into '**other**' reasons for leaving. Although these percentages are comparatively small, the information may prove helpful in determining the most appropriate strategies for employers to improve staff retention.

One reason given ranked at 3.8% (**career change**) appears in table 12. The remaining 'other' reasons given, detailed by **35** organisations, along with their percentage of total leavers, are shown in table 13.

Table 13: other reasons for leaving as % of total leavers

	% 2015	% 2014		% 2015	% 2014
removed from casual/bank register	**2.5**	2.1	moved to bank agreement	**0.2**	-
end of fixed/flexi contract	**0.8**	1.5	maternity - non returner	**0.03**	0.2
unsuccessful probation	**0.4**	0.1	resignation (no specified reason)	**13.3**	6.9
full time education/further study	**0.2**	0.1	no reason given/collected	**4.5**	12.5
caring responsibilities/child care	**0.2**	1.1	other*	**0.1**	0.1

*other includes the reasons given below - these make up 0.1% of the total leavers:

travel difficulties; transferred within organisation; visa issues/work permit expired; conflict with colleague

We note that 2.5% of leavers were **removed from casual register** and only 0.2% moved onto a bank agreement. Changes to the number of staff employed on zero hour contracts are addressed in the next section of this report.

Unsuccessful probation has increased to 0.4% of total leavers (appearing at 0.1% last year) and is perhaps an indication of the growing difficulties employers face in attracting candidates with the right skills and aptitudes necessary for work in the care sector.

Several participants reported to be attempting improvements to the ways in which they collect leaver information. We have commented previously on the importance of such information to develop sector strategies to improve staff stability and to determine what proportion of people working in social care do so in order to gain practice experience before progressing to professional training or seeking other similar career opportunities.

sickness absence

Members collect sickness absence data in various ways and it has not been possible for some organisations to provide data. Sickness absence information (as % of the total days for 2014-15) was provided by **49** organisations, representing 69% of participants.

This year the rates reported ranged from 0.2% to 17.2% with a mean average of 5.1% as shown in table 14.

Table 14: sickness absence as % of the total days

	% 2015	% 2014	% 2013	% 2012
min	0.2	0.7	0.4	1.6
average	**5.1**	**4.3**	**5.1**	**5.5**
max	17.2	8.4	**22.0**	14.0
	N = 49	**N = 40**	N = 36	N = 36

The highest absence reported (17.2%) included the comment "the higher than average rate has been influenced by a number of long term absences".

qualification rates

A total of **51** organisations supplied details of care staff achieving (or working towards) a **relevant qualification** at minimum QCF level 2. The results for care staff in each setting are shown in table 15.

Table 15: care staff with relevant qualifications

	RES OP	DOM OP	RES YA	DOM YA	SUP LIV	DAY	OVERALL
minimum	12.6%	10%	57%	75%	9%	17.6%	
maximum	100%	100%	100%	90%	100%	100%	
2015 average	**72.6 %**	**68.2 %**	**86.4 %**	**81.7 %**	**66.8 %**	**79.1 %**	**72.5 %**
participants	N = 49	N = 26	N = 7	N = 3	N = 16	N = 11	N = 51
2014 average	73.8 %	64.9 %	79.1 %	80.0 %	68.6 %	64.9 %	70.8 %

The comparison for level 2 rates with previous years is shown in table 16.

Table 16: care staff achieved/working towards minimum QCF level 2

number of organisations	**2015**	2014	2013	2012
more than 50% staff	**47**	40	36	31
40-50% staff	**1**	1	2	1
30-40% staff	**1**	2	2	3
less than 30% staff	**2**	2	2	1
	N = 51	N = 45	N = 42	N = 36

The survey appears to show continuing investment in qualifications and for most settings, a slight improvement on previous years. Given the pressures on costs this is an encouraging outcome.

53 organisations supplied details for management qualified to minimum QCF level 4. The results for managers qualified to minimum level 4 in each care setting are shown in table 17.

Table 17: managers with relevant qualifications (minimum QCF level 4)

	RES OP	DOM OP	RES YA	DOM YA	SUP LIV	DAY	OVERALL
minimum	5%	60%	85%	85%	25%	85%	
maximum	100%	100.0%	100%	100%	100%	100%	
2015 average	**92 %**	**96.9 %**	**97.9 %**	**92.5 %**	**92.1 %**	**94.7 %**	**93.8 %**
participants	N = 48	N = 24	N = 7	N = 2	N = 15	N = 9	N = 53
2014 average	94.8 %	92.7 %	93.8 %	100 %	94.2 %	88.0 %	93.5 %

1 organisation reported zero% of managers in their supported living service qualified to level 4. As this represents only one individual this figure was withdrawn from the workings so as not to affect the findings disproportionately.

A modest average increase in qualifications for managers compared to 2014 belies seemingly significant improvement for domiciliary and day care. Overall another positive indicator.

zero hour contracts

Previous workforce surveys found that zero hour contracts were in use across a significant proportion of member organisations. We included a question this year to record the percentage of staff currently employed in this way.

Of 52 respondents to this question, **18** organisations reported **no use of zero hour contract** and **34** organisations indicated zero hour contracts were still in use for a percentage of staff. The results according to size of organisation are shown in table 18.

Table 18: the use of zero hour contracts

number of staff in organisation	up to 300	301 - 1000	1001+	2015	2014	2013
number of orgs operating zero hour contracts	**7**	**13**	**14**	**33**	40	40
% total staff in this group employed on zero hour contract (range)	1% - 26%	1% – 30%	0.3% - 33%	**average 15.3%**	-	-
number of staff employed on zero hour contract	129	1,107	5,968	**7,204**	9,353	11,553

Across **33** organisations, a total of **7,248** staff are reported to be currently employed on zero hour contracts. The findings appears to show a downward trend with a reduction of more than 2,000 since our 2014 survey and some 37% reduction in the use of this method of employment since 2013. However, as a number of different organisations participated in this survey we are unable to make direct comparisons with earlier years.

6 of these organisations reported fewer than 5% of their staff were employed on zero hour contracts and almost half of participants reported zero hour contracts affected fewer than 13% of their staff. Only 4 organisations reported to employ more than a quarter of their staff on zero hour contracts with the highest recorded at 30%.

Our November survey showed the majority of organisations which operated zero hour contracts did so within residential services (87%); then domiciliary services (46%); supported living services (35%) and 22% of organisations used zero hour contracts for day care staff.

It certainly seems as though providers have responded to the criticisms made in the use of zero hour contracts. We will consider this topic again for future surveys.

agency: the use and cost of agency staff

A total of **45** organisations reported their annual spend on agency staff. **43** organisations completed annual agency spend for residential care settings. **13** organisations provided the costs for domiciliary (homecare) operations and **9** organisations included costs for other care services. Annual spending ranged from £3,280 through to £2.7m with a combined agency spend total of **£32.1m**. The results are shown in table 19.

Table 19: annual spend on agency staff

	2015	2014	2013
residential services	**£ 28.1m**	£ 21.8m	£ 17.6m
domiciliary services	**£ 1.7m**	£ 1.6m	£ 1.4
other care services	**£ 2.3m**	£ 1.3m	£ 0.5
combined agency spend	**£ 32.1m**	**£ 24.8m**	**£ 19.5m**
	N = 45	N = 43	N = 34

The greatest share (£28.1m) was recorded for residential care settings; £1.7m for domiciliary (homecare) and £2.3m spend across other care services. This year **14 organisations** declared an agency spend **greater than £1m** (2014: 10; 2013: 5) with 13 of these spending more than £1m for care staff in residential settings.

Table 20: agency costs as % of total staff costs

	residential		domiciliary		other care services	
	2015	2014	2015	2014	2015	2014
min	0.01 %	0.1 %	0.3 %	0.1 %	0.8 %	0.3 %
average	5.9 %	6.2 %	4.2 %	1.8 %	5.6 %	3.4 %
max	18.3 %	27.0 %	16.0 %	3.9 %	20.0 %	7.6 %
	N = 40	N = 35	N = 12	N = 7	N = 10	N = 9

Agency spend, as a percentage of the total staff costs, ranged from 0.01% to 20% with the minimum, maximum and mean averages for each setting shown in table 20. A breakdown of costs as % of total costs within each setting is shown in table 21. In all settings the majority of agency spending is for care staff. This year more than a quarter of agency costs in 'other care settings' was spent on management.

Table 21: agency costs as % of reported costs within each setting

agency spend on	care staff	management	catering	other	total spend
residential	94.3 %	0.5 %	1.6 %	3.5 %	£ 28.1m
domiciliary	98.0 %	-	2.0 %	-	£ 1.7m
other care services	67.6 %	26.6 %	0.1 %	5.7 %	£ 2.3m

43 organisations reported the cost of agency compared to the previous year as shown in table 22.

In 64% of residential settings agency costs were greater than last year. In domiciliary care settings 62% declared costs were greater than last year. In other care services the variation from last year was split at 50% of organisations reporting greater/less spending.

Table 22: agency costs compared to previous year

	residential		domiciliary		other care services	
cost compared to previous year	greater	less	greater	less	greater	less
number of organisations	27	15	8	5	6	6
% of orgs in this section	64 %	36 %	62 %	38 %	50 %	50 %
	N = 42		N = 13		N = 12	

The findings starkly show the actual cost of recruitment and retention difficulties currently faced by the care sector …and the situation is getting worse. These costs represent expenditure that no provider wants to be paying as it takes away resources that could be better spent on service improvement and rewarding staff. However the net use of agency is an endemic systemic problem within care and health and can probably only be addressed as such.

3. developments since our 2014 survey

Since our last report in July 2014 some significant developments have occurred that it is important to note.

the Care Act

The first phase of the new **Care Act** came into force in April 2015 with important changes to legislation and regulation. This includes the introduction of a **Care Certificate** with an identified set of standards that health and social care workers are expected to undertake as part of induction which has the benefit of portability. *Implementing the Care Act* was the main topic of discussion at our conference for senior directors in May and this theme is to be continued for front line managers at the **NCF managers conference** in November 2015.

links to some relevant reports

In May 2015 the General Election resulted in a change of government which has confirmed continuing austerity, particularly for the public sector, which means cuts are deepening and the care market is becoming more fragile. It seems likely that these factors will continue to add pressure on the adult social care workforce. In fact there is a growing realisation that nurse recruitment has reached a difficult point. A report by the RCN ***Frontline First: the fragile frontline*** powerfully argues the case that an over-stretched workforce risks the welfare of patients and staff.

There is increasing recognition that a better deal for the workforce is essential to the quality and sustainability of social care provision in the UK, but research by JRF and the Resolution Foundation: *As if we cared* suggests there has been little substantive evidence as to the scale of investment required. There has been a growing argument about the importance of setting the **Living Wage** as the aspirational standard for the care sector (a recommendation of the Demos Commission on Residential Care, September 2014) rather than the National Minimum Wage although given the reliance on public sector funding there has been limited progress in achieving such an increase.

A scoping review of evidence on care home managers undertaken by the Social Care Workforce Research Unit at Kings College London helpfully provided data on the role and tasks of frontline managers: ***Care home managers: a scoping review of evidence***

Skills for Care's ***The State of the Adult Social Care Sector and Workforce in England*** was published in March 2015. This report uses data from the NMDS-SC to explore characteristics of the adult social care sector, including the size and structure of the sector and workforce, demographic information, recruitment and retention issues, pay rates, and qualifications and training information. The main findings include:

- *the overall turnover rate of the adult social care workforce was 25.4% (equating to around 300,000 workers leaving their role each year)*
- *over 80% of the adult social care workforce is female and a fifth are aged 55 or over*
- *the mean hourly pay rate of a care worker was £7.32, just over £1 more than the NMW*

In June the Department of Health established a *Social Care Nursing Taskforce* following on from a symposium held in February and a symposium report: ***the recruitment and retention of nurses in adult social care***. It will seek to address the issues raised by the **CQC *state of care*** report (published in February 2015) which focused on the high turnover of nurses within adult social care.

This report, ***Skills and Performance Challenges in the Health and Social Care Sector*** (May 2015), from the UK Commission for Employment and Skills examined recent changes in the health and social care and outlines future skills issues facing the sector. The research looks in depth at five key occupations including care assistants and care home managers/proprietors. It uses a mixed methodology including data analysis, a literature review and in-depth interviews with employers and sector organisations as the basis for analysis. The report highlights particular challenges around recruitment and training if the sector is to be able to respond to future demand.

4. concluding remarks and thanks

The purpose of collecting this information every year is to help our members. Benchmarking information enables NCF members to be well-informed and it is our aim that this will assist with the HR and personnel challenges faced by care providers. It is an added bonus that we are able to use these findings in our discussions with government departments, regulators and sector bodies to further support our representation of not-for-profit service providers. This year's report has already received a mention in a discussion at the House of Lords and will no doubt receive attention across the sector as the issues resonate more widely.

Each year we have sought to improve on the questions, the process and our presentation of the results. I hope that you find the report helpful and we very much want to hear from you if you think there are further refinements we could introduce to make any part of this exercise work better.

Once again I would like to thank those members who participated in the survey – we can't do it without you! It is great that we have such good engagement from our members. Many have been completing the questionnaire since we developed the benchmarking exercise 12 years ago.

This year we have involved the largest ever number of members (75% of eligible organisations at March 2015) and the findings represent 64,896 employees across our membership. This is an amazing response and a great achievement. It is made possible in large part because Claire Silvester has developed such a good working relationship with those that complete the questionnaire. Once again I would like to record my thanks to her for all her efforts, expertise and enthusiasm that makes possible this valuable annual report.

Des Kelly OBE | Executive Director | National Care Forum

July 2015

participating organisations

NCF would like to record our thanks to these member organisations for participating in our 2015 survey

- Abbeyfield Kent Society
- Accord Group Care & Support
- Alde House Residential Care Home
- Avante Care and Support
- Balkerne Gardens Trust
- BEN - The Automotive Industry Charity
- Black Country Housing Group
- Blind Veterans UK
- Borough Care
- The Brendoncare Foundation
- Brunelcare
- Care South
- C&C (Central & Cecil)
- Choices Housing Association
- CLS Care Services Group
- Community Integrated Care
- Cornwall Care
- Coverage Care Services Ltd
- ExtraCare Charitable Trust
- Focus Birmingham
- The Fremantle Trust
- Friends of the Elderly
- Glebe Housing Association
- Gold Hill Care
- Greensleeves Homes Trust
- Guild Care
- Guinness Care and Support
- Heritage Care
- HICA Group
- Jewish Care
- Joseph Rowntree Housing Trust
- Leo Baeck Housing Association
- Linc Care
- Making Space
- Mary Feilding Guild
- Morden College
- New Outlook Housing Association
- The Orders of St John Care Trust
- Ormerod Trust
- Parkhaven Trust
- Quantum Care
- RAF Benevolent Fund
- Royal Hospital Chelsea
- Royal Masonic Benevolent Institution
- The Royal Star & Garter Homes
- Sanctuary Care
- Sense
- Sir Josiah Mason Trust
- Somerset Care
- Somerset Redstone Trust
- St Christopher's Care Home
- St John's Winchester Charity
- St Monica Trust
- Swarthmore Quaker Care Home
- The Royal British Legion
- The Salvation Army
- Trident Reach the People Charity
- Vista Blind
- Wales and West Housing Association
- WCS Care Group

The National Care Forum represents not-for-profit care and support providers across the UK

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