Personnel Statistics Report

Survey of NCF member organisations

one of the largest workforce surveys in the care sector

July 2014

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

"Bringing quality to life"

National Care Forum

Personnel survey report 2014

Contents

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1. Introduction - one of the largest workforce surveys in the care sector

The NCF Personnel Statistics report has proved to be a valuable benchmarking tool for our members and we have now reported on workforce findings for eleven consecutive years. The information on which these findings are based covers a total of **64,805** staff and therefore represents a considerable workforce survey and one of the largest in the care sector. We are greatly encouraged that participation in the survey continues to increase with more than **70%** of eligible members taking part this year. Thank you to those NCF members who found the time to complete the questionnaire.

Summary

The findings for 2014 cover a total of **64,805** staff. The **58** organisations in the survey range in size from **19** to over **7000** employees:

- **33%** employ **less than 300** workers
- **29%** employ **301 - 1000** workers
- **38%** employ **more than 1000** workers
- **7%** employ **more than 3000** workers

Highlights at-a-glance

		2013 survey	2014 survey
total staff	the findings for 2014 cover a total of **64,805** staff	51,297	**64,805**
front line care staff	residential care workers and senior care workers as % of total staff	47.7%	**41.4%**
	domiciliary care workers and senior care workers as % of total staff	13.1%	**18.3%**
age profile	percentage of staff aged over 45	49.5%	**47.9%**
	percentage of staff aged under 25	12.2%	**12.0%**
vacancy rate	average vacancy rate as % of total days	5.5%	**6.0%**
staff turnover	turnover of staff in residential care for older people	17.3%	**18.4%**
	turnover of staff in Domiciliary care for older people	29.9%	**22.1%**
	turnover of staff in residential care for younger/other adults	15.0%	**15.5%**
	turnover of staff in supported living facilities	13.6%	**9.5%**
	turnover of staff in day care facilities	7.2%	**15.6%**
leavers	staff leaving within 12 months	32.4%	**38.8%**
	staff leaving within 2 years	56.7%	**65.5%**
sickness	sickness absence as a % of total days?	5.1%	**4.3%**
qualifications	care staff with/working towards minimum of NVQ level 2	68.3%	**70.8%**
	Managers with/working towards NVQ level 4	81.6%	**93.5%**

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.

Staff employed by group

- **Head/registered office**

  Staff working in the head or registered office of the organisation

- **Residential/nursing (older adults)**

  Including facilities where services are mainly for residents over 65 years

- **Domiciliary services (older adults)**

  Including care-at-home services mainly supporting persons over 65 years

- **Residential/nursing (younger/other adults)**

  *Including facilities where services are mainly for residents under 65 years**

- **Domiciliary services (younger/other adults)**

  *Including care-at-home services mainly supporting persons under 65 years**

**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)

- **Supported Living**

  Including facilities for adults with personal care needs (e.g. adults with learning disabilities or a particular health condition) to live in a supported environment

- **Day Care**

  Including day centres, drop in centres. Also includes day care services within other facilities where staff are specifically employed as day care workers.

We will review these categories each year to ensure they adequately reflect the changing nature of services offered by members.

Abbreviations key

RES OP	residential/nursing services for older adults	**RES YA**	residential/nursing services for younger adults or adults with needs that are not specifically age related
DOM OP	domiciliary services for older adults	**DOM YA**	domiciliary services for younger adults or adults with needs that are not specifically age related
SUP LIV	supported living services	**DAY**	day care services
N =	number of participating organisations in each section		

Size of participating organisations

In this section responses from **58** organisations cover a total of **64,805** staff employed. Table 1 shows the breakdown of respondents by size of organisation. Participants varied greatly in organisation size, ranging from **19** to **7,100** employees, with all size groups represented, and may be regarded as a good representation of NCF membership as a whole.

Table 1: organisation size

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

We are pleased to note that the smaller organisations group (up to 300 staff) has seen the greatest increase in participation this year.

Skills for Care 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** (12 in this survey)
- **Large** organisation: those employing **more than 249** (43 in this survey)

A significant proportion of NCF member organisations are therefore defined as large employers with **53.4%** of those responding to this survey employing more than 500 staff.

Staff employed

54 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	%	%	%
		2014	**2014**	2013	2012
HEAD OFFICE	Head Office/Admin	2,198	3.5	**3.6**	4.1
	Training	113	0.2	**0.2**	0.5
	Other	552	0.9	**0.7**	1.7
			N = 47	**N = 39**	N = 37

		number	%	%	%
RESIDENTIAL OP	Care Worker	22,269	35.5	38.9	40.3
	Senior Care Worker	2,284	3.6	4.8	4.7
	Registered Nurse	1,759	2.8	3.1	2.7
	Supervisor	1,842	2.9	3.1	4
	Registered Manager	700	1.1	1.3	1.1
	Admin/office staff	1,062	1.7	1.6	2
	Other	7,190	11.5	12.4	13.5
			N = 51	N = 41	N = 35

		number	%	%	%
		2014	**2014**	2013	2012
DOMICILIARY OP	Care Worker	10,617	16.9	11.9	7.2
	Senior Care Worker	784	1.2	0.8	0.4
	Registered Nurse	12	0.02	0.1	-
	Supervisor	545	0.9	0.4	0.3
	Registered Manager	350	0.6	0.2	0.1
	Admin/office staff	390	0.6	0.6	0.3
	Other	457	0.7	1.0	0.3
			N = 28	**N = 23**	N = 17
RESIDENTIAL YA	Care Workers	1,333	2.1	3.5	7.4
	Senior Care Worker	116	0.2	0.4	0.5
	Registered Nurse	35	0.1	0.1	0.1
	Supervisor	174	0.3	0.1	0.5
	Registered Manager	230	0.4	0.3	0.5
	Admin/office	107	0.2	0.1	0.2
	Other	443	0.7	0.5	0.7
			N = 9	N = 11	N = 19
DOMICILIARY YA	Care Worker	110	0.2	0.5	6
	Senior Care Worker	3	0.005	0.03	0.2
	Registered Nurse			0.00	0
	Supervisor	4	0.01	0.03	0.3
	Registered Manager	5	0.01	0.04	0.3
	Admin/office staff	3	0.005	0	0.1
	Other			0.1	0.3
			N = 3	N = 6	N = 9
SUPPORTED LIVING	Care Worker	4,900	7.8	6.8	
	Senior Care Worker	276	0.4	0.3	
	Registered Nurse	39	0.1	0.01	
	Supervisor	191	0.3	0.2	
	Registered Manager	397	0.6	0.7	
	Admin/office staff	107	0.2	0.1	
	Other	192	0.3	0.4	
			N = 22	N = 15	
DAY CARE	Care Worker	641	1.0	0.6	
	Senior Care Worker	95	0.2	0.1	
	Registered Nurse			0	
	Supervisor	52	0.1	0.1	
	Registered Manager	32	0.05	0.1	
	Admin/office staff	70	0.1	0.1	
	Other	115	0.2	0.2	
			N = 20	N = 6	

Zero hour contracts

In response to member concerns relating to recent media attention in the sector, a section was included in our November 2013 Pay, Terms and Conditions survey (PTC) to better understand the use of zero hour contracts. We asked in which service areas members operated zero hour contracts and how many people were employed in this way. A total of **40** organisations reported to use zero hour contracts in the following service areas:

The use of zero hour contracts (November 2013)

service	number of organisations operating zero hour contracts	total number of people employed in this way
residential/nursing care	35	6,724
home care	23	4,215
day care	7	59
supported living	13	555
total number of staff employed on zero hour contracts		**11,553**

It became apparent that this style of employment is used fairly widely across the NCF membership. As a consequence we followed up this question for the current report, to record the percentage of casual staff employed on zero hour contracts.

A total of **41** organisations gave information on this topic and **40** organisations gave the percentage of casual staff employed on zero hour contract. The results, according to size of organisation, are shown in table 3.

Table 3: the use of zero hour contracts (March 2014)

number of staff in organisation	up to 300	301 – 1000	1001+	
number of orgs operating zero hour contracts	10	13	17	**40**
total employees in this group	1,695	8,314	41,837	**51,846**
total casual staff in this group	274	1,564	11,049	**12,887**
% casual staff employed on zero hour contract (range)	9.9% - 100%	12.0% - 100%	27.0% - 100%	**average 65.1%**
total number of staff employed on zero hour contract in this group	240	880	8,232	**9,353**

A total of **9,353** staff were reported to be employed on zero hour contracts.

Although it appears that there has been a decrease of some 2,000+ workers from the total recorded in our PTC survey, we note that some organisations in our current survey differ from those responding to our November survey and so direct comparisons cannot be assumed.

The % casual staff employed on zero hour contracts clearly varies greatly. **17** organisations reported **100%** of their **casual staff** were employed on zero hour contracts, mainly in the larger organisations. Other responses ranged from 3.5% to 97.8%. The mean average overall was recorded at **65.1%**.

It should be cautioned, some organisations reported that staff on zero hour contracts were recorded in the 'permanent' employee count and so it may be that our question to request the percentage of 'casual' staff on zero hour contract did not achieve the full picture. We intend to consider this for any follow up questions.

Some organisations wished us to note that their continued use of zero hour contracts is currently under review.

We will consider further how to follow up this issue when we benchmark pay, terms and conditions again later in the year.

Age profile of care staff and managers

A total of **52** organisations completed this section of the survey providing the number of staff, according to their age, for **50,167** employees within each care setting.

Table 4 shows the number of staff together with the percentage of total staff for each age group.

Table 4: age profile of total staff

	under 18	18 - 19	20 - 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
total number of staff in age band	**163**	**1060**	**4802**	**9575**	**10521**	**13285**	**8828**	**1933**
	%	%	%	%	%	%	%	%
% total staff 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

As in previous years, the **largest groups** are those aged **35-44** and **45-54**, with the latter showing the largest group for the fourth consecutive year.

The smallest groups continue this trend with the under 20s recorded at just 2.4% of the total workforce.

Table 4a: age profile of managers

	under 18	18 - 19	20 – 24	25 - 34	35 - 44	45 - 54	55 - 64	65+
total number of managers in age band			**15**	**316**	**493**	**891**	**494**	**44**
	%	%	%	%	%	%	%	%
% managers 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, almost double that of the age groups either side. A slight increase for managers aged 25-34 sits alongside the same percentage decrease for managers aged under 25.

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

	staff **over 45**	managers **over 45**	staff **under 25**	managers **under 25**
% total staff 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
2011	43.3	59.3	15.6	3.5

The results show that almost half of the workforce (**47.9%**) are aged over 45.

The number of staff aged under 25 has fallen again to **12%** with managers under 25 representing less than **1%** of the workforce.

Table 6: percentage of care staff working in each sector

Table 6 shows the percentage of staff in these age groups according to their work setting.

	RESIDENTIAL over 45	RESIDENTIAL under 25	DOMICILIARY over 45	DOMICILIARY under 25
% staff group 2014	**41.6**	**13.3**	**48.8**	**12.9**
2013	43.8	13.0	47.7	14.4
2012	45.0	14.9	40.1	17.8
2011	42.2	16.3	33.2	21.5

The gap between the percentage of younger staff and the percentage of older staff in these care settings remains apparent. A slight increase of staff aged under 25 in residential care is mirrored by a slight decrease in staff aged over 45. However in domiciliary care services the gap appears to be widening with greater numbers over 45 and less staff aged under 25 for the third consecutive year.

	SUPP LIVING over 45	SUPP LIVING under 25	DAY CARE over 45	DAY CARE under 25
% staff group 2014	**49.6**	**9.5**	**55.1**	**8.8**
2013	49.7	8.2	56.9	6.4

However, the Supported Living and Day Care categories, introduced last year, may indicate a change to this trend. Day care settings in particular appear to be attracting younger staff, showing an increase of 2.2% in staff under 25 and a corresponding decrease in staff aged over 45.

Vacancy rates

A total of **41** organisations provided vacancy rates ranging from **0%** through to **24.0%**, with a mean average of **6.0%** as shown in table 7.

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*

This year we received a wide variation in vacancy reported across the membership with **5 organisations** reporting **less than 1%** vacancy rate. 2 organisations (with fewer than 200 staff) reported zero vacancies.

Table 7: vacancy rates

	% **2014**	% 2013	% 2012
min	0	0	0.8
average vacancy rate	**6.0**	**5.5**	**5.9**
max	24.0	22.0	16.0
	N = 40	N = 36	N = 28

Please note: the highest rates reported were queried and it transpired some organisations had recorded newly added posts (still under recruitment process) in their vacancy rate. These responses were revised to show existing post vacancies and we will add this to the guidance for future surveys.

Turnover rates

We asked members to provide turnover information for permanent employees in their head office and each care setting. This year **47** organisations completed turnover information (81% of participants). The range of responses and average turnover for each setting are shown in Table 8.

Table 8: staff turnover rates

		% 2014	% 2013	% 2012
HEAD OFFICE	range min (5 reported zero)	0	0	0
	mean average	**13.1**	**9.9**	**11.6**
	range max	50.0	30.0	36.2
		N = 41	N = 32	N = 36
RES OP	range min	2.0	4.1	8
	mean average	**18.4**	**17.3**	**19.6**
	range max	50.0	43.0	36.2
		N = 45	N = 35	N = 35
DOM OP	range min (3 reported zero)	0	4.1	1.4
	mean average	**22.1**	**29.9**	**27.7**
	range max	54.0	50.5	50.6
		N = 25	N = 17	N = 15
RES YA	range min	5.8	6.5	5.4
	mean average	**15.5**	**15.0**	**14.9**
	range max	20.0	26.0	36.2
		N = 8	N = 8	N = 15
SUP LIV	range min (1 reported zero)	0	0	
	mean average	**9.5**	**13.6**	
	range max	23.9	30.5	
		N = 19	N = 11	
DAY	range min (4 reported zero)	0	0	
	mean average	**15.6**	**7.2**	
	range max	50.0	21.4	
		N = 14	N = 11	

There appears to be something of a link between smaller staff teams and lower turnover. Some groups recorded **zero turnover**, in particular Day Care shows **4** organisations reporting zero turnover and Supported Living teams report the lowest mean average turnover of staff at **9.5%**.

Clearly staff stability remains a continuing challenge for employers. Of course, the data on turnover is only part of the picture as the 'churn' is also an important factor and this is considered further in the next section.

The results this year are an interesting mix with evident improvement in domiciliary care for older people and supporting living, but worryingly, turnover in residential care for older people and for head office staff has increased.

Leavers: analysis

A total of **49** organisations completed this section, recording a total of **14,350** leavers. The percentage breakdown of leavers, according to length of service is shown in Table 9.

Table 9: leavers according to length of service

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

More than a quarter of staff are shown to leave within **1-2 years** (**26.7%**). The results show increases for staff leaving with less than 2 years' service across the board, with the exception of non-starters which is recorded down to 1.1%. Table 9a shows the average leavers according to length of service across all care settings.

Table 9a: average % leavers according to length of service

% of leavers in	2014	2013	2012
under 12 months	38.8	32.4	30.9
under 2 years	65.5	56.7	56.7
2-5 years	18.5	23.8	24.1
5 years +	14.9	18.0	19.2

The high loss of workers inside the first 12 months indicates a growing concern, where the average is shown at **38.8%** - more than a third of recruits, and almost two thirds (**65.5%**) inside 2 years.

Table 10: leavers according to setting

	RESIDENTIAL			DOMICILIARY			SUP LIV		DAY CARE	
% of leavers in	2014	2013	2012	2014	2013	2012	2014	2013	2014	2013
under 12 months	36.1	30.4	28.9	47.4	40.7	37.3	30.3	28.3	23.8	11.9
under 2 years	63.3	56.8	55.5	73.5	61.0	60.8	59.4	52.8	40.6	30.5
2-5 years	19.4	22.9	24.6	17.1	28.5	24.1	20.3	20.8	22.8	25.4
5 years +	17.4	20.4	20.0	9.5	10.5	16.7	20.3	26.3	36.6	44.1

There appears to be an increase in the percentage of staff leaving within 2 years across all settings. Domiciliary teams recorded the greatest numbers leaving within 12 months (**47.4%**) and **73.5%** within 2 years - an increase of 12.5% on last year's average. Supported Living and Day Care teams appear to fare slightly better on staff retention with over a fifth of SL staff (**20.3%**) and over a third of day care staff (**36.6%**) remaining in post for more than 5 years.

As we have said on previous occasions preparing this report, there can be little doubt that the retention of staff remains a key management priority and an on-going challenge across all settings.

Reasons for leaving

This section was completed by **46** organisations with information detailing **13,434** leavers.

Table 11 shows the main reasons given for leaving by care workers (ranked in order with comparisons to previous years where possible). As a large proportion of the results fall into the 'other' category it highlights again the difficulty of collecting meaningful benchmarking data on the reasons for leaving.

Table 11: reasons for leaving as % of total leavers

	number 2014	% 2014	% 2013	% 2012
Personal reasons	4,231	31.5	19.8	13.3
Dismissal	1,172	8.7	7.8	8.7
Career development	976	7.3	3.2	4.2
Competition from other employers	900	6.7	6.5	3.4
Redundancy	508	3.8	2.4	1.6
Nature of work	437	3.3	3.4	3.6
Retirement	410	3.1	3.9	4.0
Ill health	373	2.8	4.5	4.9
Relocation	333	2.5	3.4	3.8
Pay	155	1.2	2.6	1.8
Conditions of employment	103	0.8	2	1.9
Death	48	0.4	0.3	0.6
Unknown/other	3,788	28.2	40.1	48.3
total leavers	**13,434**	N = 46	N = 40	N = 32

Personal reasons and **dismissal**, as in previous years have remained the top reasons given for leaving a post. Notably **career development** has risen significantly to place in the top three with **competition from other employers** remaining high in the listing and **redundancy** rising to fifth place.

Pay as a reason for leaving retains a low ranking in the reasons given, although it is notable that **pay** + **nature of work** + **conditions of employment** taken together represent **5.2%**.

Other reasons for leaving were detailed by **34** organisations. The reasons given, along with their percentage of total leavers, are shown in Table 12.

Table 12: Other reasons for leaving as % of total leavers

	2014	2013		2014	2013
resignation (no specified reason)	**6.9**	14.5	Personal - other employment	**0.3**	
no reason given/collected	**12.5**	14.4	maternity - non returner	**0.2**	0.2
TUPE/transfer to another employer	**4.8**	0.8	compromise/mutual agreement	**0.1**	0.4
better career prospects	**2.3**		full time education/further study	**0.1**	
career change	**0.8**	1.1	other*	**0.1**	2.2

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

Resigned during disciplinary process; visa issues/permit expired; travel difficulties/proximity to home

Although the numbers/proportions are comparatively small, the information may prove helpful in determining the most appropriate strategies for employers to improve staff retention.

Sickness absence

Sickness absence information (as % of the total days for 2013-14) was provided by **40** organisations, representing 69% of participants. The guidance for this section read as follows:

What is sickness absence as % of the total days?	*e.g. if you recorded 150 sick days for 25 staff:*
	1. Calculate 25 x average working days per year = total days
	2. Divide 150 by the total days
	3. Times by 100 to show as a %

Members collect sickness data in various ways and so it has not been possible for some organisations to provide data to answer this question.

This year the rates reported ranged from **0.7%** to **40.0%** with a mean average of **5.2%**.

The highest absence (**40%**) was queried and this organisation confirmed '*one particular home where the sickness absence was high had several members of staff on long term sick.'* With this clearly an anomaly, we felt it prudent to recalculate the responses with this example excluded. This resulted in a range of **0.7%** to **8.4%** with a mean average of **4.3%** - indicating a continuance to the reductions seen since 2012 and we are reasonably confident this is an accurate accounting trend.

Table 13: sickness absence as % of the total days

	% 2014	% 2013	% 2012	% 2011
min	0.7	0.4	1.6	0.25
average	**4.3**	**5.1**	**5.5**	**5.4**
max	8.4	**22.0**	14.0	11.0
	N = 40	N = 36	N = 36	N = 33

Interestingly, more than half of responses were higher than this average. In this instance the mode response (**4.8%**) may also prove a helpful benchmark.

Agency: the use and cost of agency staff

A total of **43** organisations completed this section of the survey. **42** organisations completed annual agency spend for residential care settings. **10** organisations provided annual agency spend for domiciliary care operations and **12** organisations completed costs for other care services.

Table 14: agency spend

	2014	2013	2012
combined agency spend	**£24.75m**	**£ 19.5m**	**£ 16.4m**
range min	£1,660	£ 440	£ 260
range max	£1.83m	£ 3.25m	£ 2.19m
	N = 43	N = 34	N = 34

The breakdown of agency spend totalled **£24.75m** with the greatest share (£21.9m) recorded for residential care settings. Once again a huge range was recorded from **£1,660** through to **£1.83m**.

Table 15: agency cost as % of total staff costs

	RESIDENTIAL		DOMICILIARY		OTHER CARE SERVICES	
	2014	2013	2014	2013	2014	2013
min	0.12%	0.02%	0.10%	0.03%	0.30%	0.71%
average	6.15%	4.68%	1.84%	2.02%	3.44%	3.79%
max	27.00%	14.29%	3.91%	5.00%	7.60%	7.70%
	N = 35	N = 33	**N = 7**	N = 8	**N = 9**	N = 6

Agency spend, as a percentage of the total staff costs, ranged from **0.1%** to **27%**, a wider range than shown in previous years (2013 range: 0.02% to 14.29%; 2012 range: 0.8% to 14.8%), with mean averages of:

- **6.15%** for residential services (2013: 4.68%; 2012: 4.2%; 2011: 5.3%)
- **1.84%** for domiciliary services (2013: 2.02%; 2012: 0.8%; 2011: 1.3%)
- **3.44%** for other care services (2013: 3.79%)

A breakdown of costs within each setting is show in table 16. In all settings, over 90% of agency spending is for care staff. Agency spend on catering in residential care accounts for 2.4% of the spend in that setting.

Table 16: agency costs as % of reported costs within each setting

	RESIDENTIAL	DOMICILIARY	OTHER CARE SERVICES
care staff	90.0%	99.4%	94.8%
management	2.5%	0.6%	0.3%
catering	2.4%	-	1.6%
other	5.1%	-	3.3%
total spend in this setting	**£ 21.8m**	**£ 1.6m**	**£ 1.3m**
	N = 42	N = 10	N = 12

Agency cost compared to previous year

41 organisations reported the cost of agency compared to the previous year, as shown in Table 17. Of the largest group (residential settings) **76%** reported costs to be greater than last year, whilst in domiciliary care settings **60%** declared costs were greater than last year. In other care services the variation from last year was split at **50%** with greater costs and **50%** recording costs down from last year.

Table 17: agency costs compared to previous year

	RESIDENTIAL		DOMICILIARY		OTHER CARE SERVICES	
number of orgs report costs:	**greater**	less	greater	**less**	greater	less
than previous year	**31**	10	4	**6**	5	5
% of orgs in this section	**76%**	24%	40%	**60%**	50%	50%
	N = 32		**N = 9**		**N = 5**	

This year **10** organisations declared an **agency spend above £1m** (2013: 5; 2012: 7) with **6** of these spending over £1m for care staff in residential settings (2013: 4; 2012: 6; 2011: 6).

The data suggests a slight increase in staff turnover and vacancy rates against a modest improvement in sickness rates. Because we cannot be sure that each of these variables corresponds we cannot conclude authoritatively that a higher agency spend results from such a set of dynamics. It could simply be that the cost of agency cover is rising disproportionately.

However it is not unreasonable to suggest that the increase in the minimum spend on agency is driving up costs and there has to be potential for efficiency savings to be made here.

Qualification rates

A total of **45** organisations supplied details on care staff achieving (or working towards) level 2 and above qualifications and **44** organisations supplied details for management qualified to minimum level 4.

The results show a positive picture of qualification rates. The percentage of staff qualified to a minimum of **QCF level 2** is shown to average **70.8%**, continuing the increases of previous years (2013: 68.3%; 2012 68.2%). In addition, managers with a minimum level 4 qualification has seen a greater increase to **93.5%** (2013: 81.6%).

The results for each care setting are shown in Table 18.

Table 18: qualifications

		Care staff with minimum **CQF** level **2**		**Managers** with minimum **CQF** level **4**	
		2014	2013	**2014**	2013
OVERALL	**average**	**70.8**	**68.3**	**93.5**	**81.6**
		N = 45	N = 42	**N = 44**	N = 40
RES OP	min	29.0	13.0	5.0	5.0
	average	**73.8**	**70.8**	**94.8**	**85.8**
	max	100	100	100	100
		N = 45	N = 40	**N = 44**	N = 38
DOM OP	min	34.0	30.0	33.0	2.5
	average	**64.9**	**58.2**	**92.7**	**85.4**
	max	100	100	100	100
		N = 19	N = 21	**N = 22**	N = 18
RES YA	min	61.0	35.0	50.0	14.0
	average	**79.1**	**77.1**	**93.8**	**83.8**
	max	100	100	100	100
		N = 7	N = 9	**N = 8**	N = 9
DOM YA	min		50.0		0.0
	average	**80.0**	**70.2**	**100**	**56.0**
	max		85.0		100
		N = 1	N = 5	**N = 1**	N = 3
SUP LIV	min	0	13.0	50.0	1.0
	average	**68.6**	**66.0**	**94.2**	**84.9**
	max	100	100	100	100
		N = 14	N = 14	**N = 11**	N = 12
DAY CARE	min	10.0	14.0	50.0	75.0
	average	**64.9**	**67.3**	**88.0**	**93.6**
	max	100	100	100	100
		N = 10	N = 9	**N = 10**	N = 12

The lower rates reported were queried and confirmed, with one member adding that these figures had already increased since 31 March and that greater take up was expected in the coming year with funded level 2 and 3 qualifications more readily available.

Day care services are the only area which doesn't show a step improvement over last year. This is a very encouraging result which clearly demonstrates a continued investment by members in staff training and development. It is even more remarkable given it is occurring against a background of continuing funding pressures. The results should be seen as a positive reminder of the opportunities for staff choosing to work with good employers in the care sector.

The comparison for QCF 2 rates with previous years is shown in Table 19.

Table 19: care staff achieved/working towards minimum QCF level 2

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

We will continue to take account of the ways in which we capture vocational qualification rates to reflect the new flexible routes to learning.

Recruitment from outside the UK

A new question was added this year to learn more about the number staff currently being sourced from outside the UK and the roles to which they are recruited:

Do you recruit staff from outside the UK? If so, please indicate current number employed

A total of **6** organisations reported to recruit from oversees (10% of participants) with a total of **295** recruits in post. These organisations each employed from 380-1600 total staff. Table 20 shows the responses received.

Table 20: record of responses to oversees recruitment

organisations	number of recruits from outside the UK	% of total staff recruited from overseas	average % total staff recruited from overseas
N = 6	range: 2 – 98	range: 0.4% – 12.2%	**average: 6.0%**

Staff from overseas were reported to be recruited to a range of roles. The table below shows the roles and the number of organisations recruiting from outside the UK to these positions.

Table 20a: staff roles attracting staff from outside the UK

role	care/support	nursing	management	catering	domestic
number of orgs recruiting from overseas (N = 6)	**6**	**4**	**3**	**3**	**2**

Other comments included: *"we do not always gets told nationality …the number could be much higher."*

We will consider how best to follow up this topic in future as we expect it to remain an issue for the care sector.

NMDS–SC

Skills for Care dashboards make information from the National Minimum Data Set for Social Care (NMDS-SC) more accessible to users. We followed up our 2013 questions to record current engagement with NMDS-SC and awareness of the dashboards. **41** organisations completed this section, with **100%** reporting to already have an NMDS-SC account (2013: 78.6%). Table 21 shows the responses.

Table 21: NMDS-SC awareness

	number of orgs	2014	2013
organisation has NMDS - SC account	41	100%	78.6%
have used dashboards	22	53.7%	50.0%

Feedback scores on the use of the dashboards to explore workforce data, planning, development and benchmarking will be shared with Skills for Care to help improve their services.

NMDS-SC is now available online for all establishments in the social care sector: www.nmds-sc-online.org.uk

3. Developments since our 2013 survey

Staffing in the care sector remains a fundamental issue… and rightly so given its importance to ensuring service quality. The NCF is committed to continuing to collect data on staffing amongst its membership for benchmarking purposes on an annual basis. Of course, staffing matters are but one element of service quality and subject to policy developments and market trends. Since our last report in July 2013 there have been several developments which it may be of interest to note (in no particular order of priority).

Successful merger of Skills for Care and the NSA

Skills for Care and the National Skills Academy for Social Care (the Skills Academy), joined forces from 10 June 2014. The merged organisation combines the expertise of both teams to create a stronger offer for employers in the sector covering the leadership, learning and development needs of the sector's 1.5 million workers: find out more

Both brands will remain, and existing members of the National Skills Academy will retain their membership. NCF members automatically receive membership of NSA: find out more

There are several publications and programmes of work from Skills for Care and the National Skills Academy for Social Care (NSA) which will be of interest to members.

National Minimum Wage and Living Wage

Again this an issue that is relevant to the care sector and seems likely to a factor for the future if staff are to feel professionally valued – notwithstanding the pressures on funding: www.livingwage.org.uk/social-care-campaign

Working Time Directive and the National Minimum Wage

This aspect of staffing looks certain to be an issue for some providers and we have been in discussions with Anthony Collins Solicitors on advice for members.

Zero hours contracts

This continues to be of particular significance within the care sector given the proportions of staff involved and the reason for including it in our analysis. See Guardian feature: Social care commissioners should ditch zero-hours contracts

Cavendish Report recommendations

There was a good level of support for the recommendations of the Cavendish Report and we anticipate the Care Certificate being introduced early in 2015: Cavendish Review See also Skills for Care's draft Care Certificate documents.

Kingsmill Review

NCF gave evidence to the review by Baroness Kingsmill: The Kingsmill Review – Taking Care

The Centre for Workforce Intelligence

CfWI recently published their progress update: review of the year 2013-14

Care Act 2014

The workforce implications of the Care Act 2014 will become ever more important as the reforms are put in place from April 2015.

4. Concluding remarks and thanks

The main purpose of collecting this information from members is to help members! NCF aims to contribute to overcoming the operational challenges represented by the numbers in this report.

In addition we are able to use the findings in our discussions with government departments, regulators and sector bodies to further aid our representation of members and our involvement in initiatives and events aimed at supporting not-for-profit service providers.

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 and work better.

Once again I would like to thank those members who participated in the survey. It is great that we have such good engagement from our members with the majority contributing every year. Many have been completing the questionnaire since we developed the benchmarking exercise over 10 years ago!

We have involved the largest ever number of members (72.5% of eligible organisations at March 2014) and the findings represent our largest ever survey, with in excess of 64,000 employees across our membership. This is a tremendous achievement which in large part is the result of Claire Silvester's tenacity, expertise and continued enthusiasm. I would like to formally record my appreciation for her excellent work.

Des Kelly OBE | Executive Director | National Care Forum

July 2014

NCF would like to record thanks to these member organisations

Abbeyfield Kent Society
Accord Group Care & Support
AgeCare
Alde House Residential Care Home
Avante Partnership
Balkerne Gardens Trust
BEN - The Automotive Industry Charity
Bournville Village Trust
Brunelcare
C&C (Central & Cecil Housing Trust)
Care South
CLS Care Services
Community Integrated Care
Cornwall Care
Coverage Care Services
Essex Cares
ExtraCare Charitable Trust
Field Lane
Friends of the Elderly
Glebe Housing Association
Gold Hill Care
Greensleeves Homes Trust
Guild Care
Guinness Care and Support
Healthcare Management Trust
Heritage Care
HICA Group
Housing & Care 21
Jewish Care
Leicester Quaker Housing Association
Leo Baeck Housing Association
Lilian Faithfull Homes
Making Space
Mary Feilding Guild
Morden College
New Directions
New Outlook Housing Association
The Orders of St John Care 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
St Christopher's Care Home
St Monica Trust
St Vincent's Nursing Home
The Fremantle Trust
The Royal British Legion
The Salvation Army
Trident Reach the People Charity
Vista
Wales and West Housing Association
WCS Care Group

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

For more information please visit our website:

www.nationalcareforum.org.uk