

Review of Nursing Home Plans for Coin Street

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22nd September 2020

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Summary and conclusions

Background

Coin Street Community Builders (CSCB) owns, and from 2025 will have the opportunity to develop, Prince's Wharf and Gabriel's Wharf on the Lambeth / Southwark border adjacent to the river. It proposes to include a 76-bedroom nursing home in its scheme. The purpose of this report is to determine whether there would be a demand for such a home providing only nursing care on the Coin Street site.

A previous (2014) proposal for a mixed-use development included:

- on Gabriel's Wharf: ground and first level public uses, a public piazza leading from Upper Ground to the riverside, a 76-room nursing home, community facilities, and mixed residential accommodation above;
- on Prince's Wharf: an enabling workspace development; and
- shared basement and servicing facilities.

Features of the proposed nursing home were:

- 76 rooms in 12 'clusters' spread over 4 floors - each with activity rooms and staff facilities;
- 3 'clusters' per floor, each with its own communal space;
- an ability for each 'cluster' or floor to serve a specific need (e.g. based on age or medical condition);
- provision of onsite kitchens and community spaces to serve those living in or near to the development including a programme of activities and intergenerational work;
- designed to serve a variety of needs from neighbouring local authority referrals, NHS commissions, and self-funders;

- the nursing home to be an integral part of a wider social enterprise offer including a range of leisure, housing, and commercial provision in the immediate neighbourhood.

Current supply of care homes

We identified no care homes for older people in Bishop's ward (Lambeth) or in the two adjacent Southwark wards (Borough & Bankside and St George's). Of the four closest non-specialised care homes three are north of the river.

The nearest non-specialised care home within Lambeth and Southwark is *Tower Bridge Care Centre*, a corporate owned purpose-built 128-bedroom nursing home for older people and dementia 1.5 miles from the proposed development. The next nearest is *St Peters Residence*, a charitable 56-bedroom nursing home for older people 1.7 miles away in Lambeth.

In total the boroughs have 1,315 non-specialised beds of which 72 per cent are in nursing homes and 28 per cent are in care only homes.

North of the river we identified no care homes in the City, four non-specialised care homes nearby in Westminster with 237 beds, three nearby in Islington with 138 beds, four nearby in Tower Hamlets with 227 beds, one home nearby in Hackney with 50 beds and two nearby in Kensington & Chelsea with 83 beds.

South of the river in Wandsworth near Albert Embankment, overlooking Battersea Park, are 27 nursing beds in an eye-wateringly expensive extra care housing development.

Please also refer to the map of provision on page 35 of this report.

Demand

Concept of age-standardised demand

Kingsbury Hill Fox uses a calculation based on population growth and the probability of being on a care home to derive an age-standardised demand for care home places and project this into the future.

A sustainable occupancy rate is considered to be around 90-92 per cent, which means that the need for beds is eight to ten per cent higher than ASD indicates.

Age-standardised demand in the three wards

In 2020 the three Lambeth and Southwark wards have an age-standardised demand figure for 86 care home places; of this 79 come from older people and seven from younger adults.

In 2027, the earliest year that the facility could open, the three wards will have an age-standardised demand figure for 102 care home places; of this 95 will come from older people and eight from younger adults (after rounding).

The current demand from older people of 79 places and projected demand in 2027 of 95 places both exceed the capacity of CSCB's proposed nursing home.

Age-standardised demand in the two boroughs

In 2020 the two boroughs have an age-standardised demand figure for 2,110 care home places; of this 1,970 come from older people and 140 from younger adults.

In 2027 the two boroughs will have an age-standardised demand that will have increased by 19 per cent to 2,500 beds; 2,360 beds for older people and 142 from younger adults.

Demand from north of the river

In 2020 the City has an age-standardised demand figure for 55 care home places rising by 35 per cent to 75 in 2035. St James's and Vincent wards in Westminster have an age-standardised demand figure for 140 care home places rising by 66 per cent to 232 in 2035. The ASD for the City and the two Westminster wards combined rises by 57 per cent from 195 in 2020 to 305 15 years later.

By 2027 ASD for the City will have risen by nine per cent to 60 beds and ASD for two wards in Westminster, St James's and Vincent, will have risen by 27 per cent to 177 beds, giving an ASD for the City and the two Westminster wards that will rise by 22 per cent to 238 beds.

People who work in the City or the centre of London could also find it very convenient to have a relation in a care home where CSCB is planning its facility. Access by taxi, bus or tube is good and it is particularly convenient for those commuting via Waterloo or London Bridge. Ease of access by friends and relations of those in the proposed nursing home is a key CSCB objective.

Supply and demand

We have based our comparisons on ASD, but a sustainable occupancy rate is considered to be around 90-92 per cent, which means that the need for beds is eight to ten per cent higher than ASD indicates.

By the earliest it could open, 2027, demand in the three Lambeth and Southwark wards would be for 95 older people's beds which would easily exceed the capacity of the proposed home.

The supply of nursing beds in Lambeth and Southwark is currently a little below the level age-standardised demand would indicate and would come into balance with the addition of CSCB's proposed nursing home.

By the earliest it could open, 2027, demand at current patterns of care would easily exceed the current supply in the boroughs.

The demand for nursing beds from the City and the two wards in Westminster is currently more than double the supply.

Sources of the residents

The core and perhaps most relevant to CSCB's social purpose are the residents from the Coin Street catchment area and the rest of the three wards.

London boroughs generally prefer to place their supported residents in-borough, and so many more residents will come from Lambeth and Southwark.

Acute hospitals need care home beds for step down to free-up hospital beds and hospitals CCGs need them for NHS continuing health care patients. Guy's & St Thomas's NHS Foundation Trust is likely to be a major source of nursing residents.

There would be demand from self-funding residents both from Lambeth and Southwark and from north of the river, because of the quality of the facilities and location or for pricing and capacity reasons. Local authorities north of the river might place people in the facility too, because although local authorities generally prefer in-borough placements, the Choice Directive limits their ability to insist on an in-borough placement.

People are said to come from across London for the expensive extra care housing near the Albert Embankment because the facilities are so good.

Younger people working within easy reach of the site might also wish to place their relations in CSCB's care home because it would be easy for them to visit their relation before, after or during work.

Changes to AVLOS

Longer healthy life expectancy and the desire of older people to stay in their own homes for as long as possible are reflected in support for a range of housing options to suit the housing needs of older people. In this context, average lengths of stay (AVLOS) in care homes have been dropping for many years as extra care and intensive homecare keep people in their own homes for longer, and therefore people are older and more dependent when they enter care homes.

In terms of nursing care, however, it is an NHS assessor's decision whether nursing care is essential and therefore whether NHS Funded Nursing Care is awarded. There is no evidence that lengths of stay in nursing care are still reducing, and it is likely that the largest reductions in AVLOS are for personal care only, reflecting the ability of Councils to support many of their older residents in their own homes if all they need is personal care. This consideration does not apply to residents who need nursing care.

Conclusions

CSCB's proposed nursing home would provide a valuable local service to the residents of the three wards.

The nursing home would form a valuable addition to the stock within the two boroughs and there would be sufficient unmet demand (at current patterns of care) to fill the home.

The home would provide a valuable service to the NHS locally and in particular to Guy's & St Thomas's Hospital.

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Any unfilled places from the above would be attractive to residents from north of the river and their relations who work in the City or Central London.

London has been losing nursing and care only beds and this will help to alleviate this problem.

If an over-capacity were to develop in the future contrary to our projections the location and quality of CSCB's offering would in any event ensure its success.

Review of Nursing Home Plans for Coin Street

1. Introduction

1.1 Introduction

1.1.1 Summary

Coin Street Community Builders (CSCB) owns and has the opportunity to develop Prince's Wharf and Gabriel's Wharf and proposes to include care facilities in its scheme, probably a 76-bedroom nursing home.

1.1.2 Background

Coin Street Community Builders (CSCB) is a development trust and social enterprise which seeks to make London's South Bank and Bankside neighbourhood a better place in which to live, to work, to visit and to study. It has the opportunity to develop Prince's Wharf and Gabriel's Wharf and proposes to include care facilities in its scheme. In 2014 CSCB commissioned Kingsbury Hill Fox via LaingBuisson to review its plans and to prepare a study of the market opportunities.

On the basis of that work and further work by JLL CSCB has decided it wishes to develop a 76-bedroom nursing home on the Gabriel's Wharf site. It requested Kingsbury Hill Fox to prepare a quotation for a study of changing demographics, the likely incidence of relevant medical conditions, and existing and planned provision of facilities serving similar needs within the surrounding catchment area. The quote was accepted and this report is the result.

1.1.3 Scope of this report

The scope of this report is limited to an analysis of demand for nursing care and the supply of nursing home places in the catchment areas. It also addresses the demand and supply of care only places in case demand for nursing care becomes inadequate. It does not address alternative uses for the site, the proposed design of the nursing home or issues regarding staffing, particularly nurse staffing. CSCB will address these at the business planning or another stage, although we understand an initial study by JLL confirmed the main parameters of the proposal.

1.1.4 Selection of catchment areas

CSCB has given careful thought to the catchment areas it wishes to research and has chosen the ones within this report for the following reasons:

Bishops, Borough & Bankside, and St George's information are needed because that is the catchment area that Coin Street will want to ensure is adequately served. Lambeth and Southwark will want to know that it will meet the needs of their populations and the Lambeth, Southwark & Lewisham CCG will want to ensure that it doesn't lead to an oversupply. Coin Street will want to ensure that it works from a business planning point of view and have always envisaged that wealthier people - including those working in the City and north of the River who want parents etc to be cared for somewhere easily accessible by them - will be part of the mix.

1.2 Terminology for older people's care and accommodation

1.2.1 Assisted living

A name widely used up to ten years ago in the UK for what is now called extra care housing. In the UK the term is now used for a range of services, and in the USA it approximates to a care only (residential) home.

1.2.2 AVLOS

An acronym for average length of stay, a key indicator in care home management.

1.2.3 Care home

A collection of bedrooms (occasionally suites) and common facilities occupied under a licence for a fee that includes personal care and all meals. There are two types of care home:

- nursing home (or care home with nursing)
- care only home.

1.2.4 Care only home

A care home staffed by trained care assistants but not qualified nurses. Any necessary nursing care comes from the community nursing service (district nurses). Before 2002 it was called a residential home.

1.2.5 Close care

Close care is sheltered housing (private or social rental) close to a care home. Any care staffing is separate from the care home's, except in emergency when care home staff may provide necessary care and support.

1.2.6 Community hospital

An NHS-owned small hospital used for minor procedures, rehabilitation and long-term care.

1.2.7 Domiciliary care

Care delivered to someone in their own home. It is mostly homecare, but the term includes meals-on-wheels and other home-based services. The term is often used as a synonym for homecare.

1.2.8 Extra care housing

Self-contained dwellings (usually flats) designed for older people where meals and personal care are based on site and charged for as they are used. Other communal facilities are available depending on the size of the scheme.

1.2.9 Homecare

Care, mostly personal care but including practical (domestic) care delivered to someone in their own home. When those homes are spread around the community it is known as dispersed homecare and when the homes are clustered together it is usually the care component of extra care.

1.2.10 Nursing home

A care home staffed by trained care assistants and qualified nurses, at least one of whom is on duty at all times. The NHS makes a contribution to the nursing cost of those residents it considers to need nursing care, called NHS-funded nursing care, that goes to all nursing home residents without any means-testing.

1.2.11 Outreach

A term used mostly within the NHS for services provided outside the core service, often in the patient's home. It is sometimes used to mean domiciliary social care.

1.2.12 Private retirement housing

Sheltered housing built for leasehold ownership or rental.

Residential home - see care only home

1.2.13 Shared ownership

Shared ownership is available for social sector dwellings for older people as well as in general needs housing; it is known by a range of names including *Leasehold Housing for Older People* and *Shared Ownership Scheme for the Elderly*.

1.2.14 Sheltered housing

Accommodation for older people that may range from a single room with shared kitchen and bathrooms to a self-contained flat. There is usually a shared common room. An alarm/call system is fitted to summon the warden, who may be resident or peripatetic. It is usually rented from a local authority or registered provider (housing association), but if owned on a leasehold basis it is called private retirement housing (such as the classical McCarthy & Stone developments).

2. Population growth

The population figures herein are from the Office for National Statistics' (ONS) 2018-based Subnational Population Projections. While we have written of populations 'being' or 'will be' these are just projections based on current trends.

2.1 Population growth within Bishop's, Borough and Bankside and St George's wards

2.1.1 Summary

The older population in all three older age bands will increase in each of the three wards over the next 15 years. In the three wards combined the growth in the very old population (85+), who are the main group needing a care home place, is by 49 per cent from 290 to 435.

The earliest likely opening date of the facility is 2027, by when the number of older people within the three wards will have increased by 29 per cent from 2,430 to 3,125. The number of very old, 85 and over, will have grown by 17 per cent from 290 to 340.

2.1.2 Bishop's ward

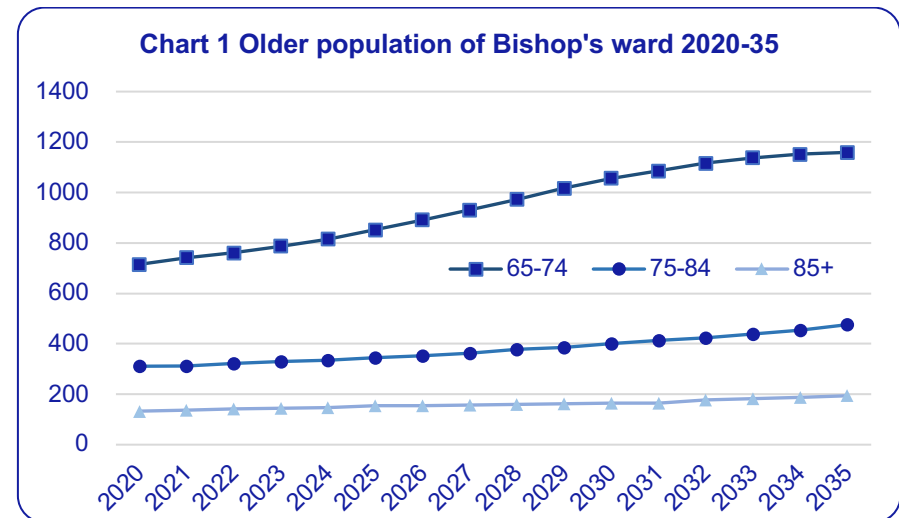
Chart 1 and Table a in the Appendix project the number of older people (ie those age 65 and over) within Bishop's Ward in Lambeth between now and 2035. These are Kingsbury Hill Fox's projections based on figures from the ONS, derived from the ward-level population estimates and projected using the growth projections for the local authority area.

These show that the total number of older people is projected to grow by 58 per cent from 1,159 to 1,829 over the next fifteen years:

- for people aged 65-74 the growth is by 62 per cent from 715 to 1,160

- for people aged 75-84 the growth is by 53 per cent from 310 to 475, and
- for the very old, 85 and over, the growth is by 46 per cent from 135 to 195.

The number of young (working age) adults, who will make up the nurses and care workers for these older people, is projected to increase by six per cent over the period.



2.1.3 Borough & Bankside ward

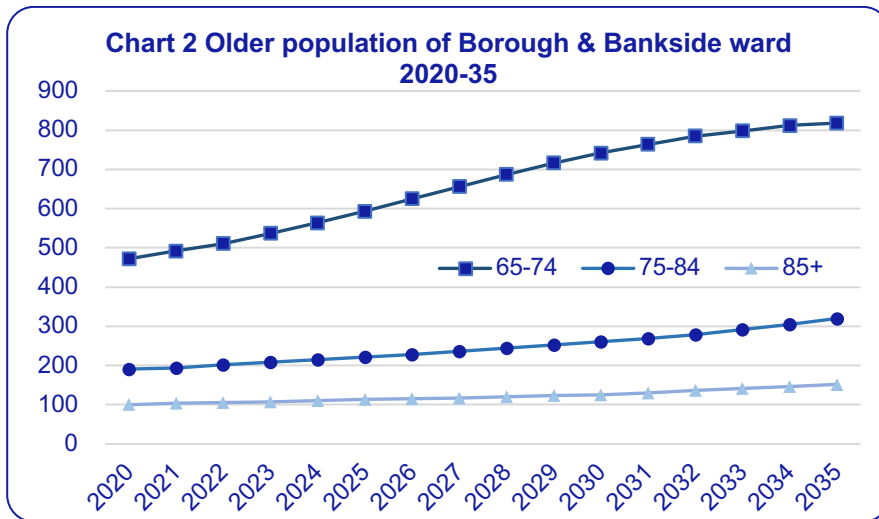
Chart 2 and Table b in the Appendix project the number of older people within Borough & Bankside ward in Southwark by age band:

- number of older people is projected to grow by 69 per cent from 765 to 1,290 over the next fifteen years
- for people aged 65-74 the growth is by 73 per cent from 470 to 820

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- for people aged 75-84 the growth is by 68 per cent from 190 to 320, and
- for the very old, 85 and over, the growth is by 52 per cent from 100 to 150.

The number of young adults is projected to increase by seven per cent over the period.



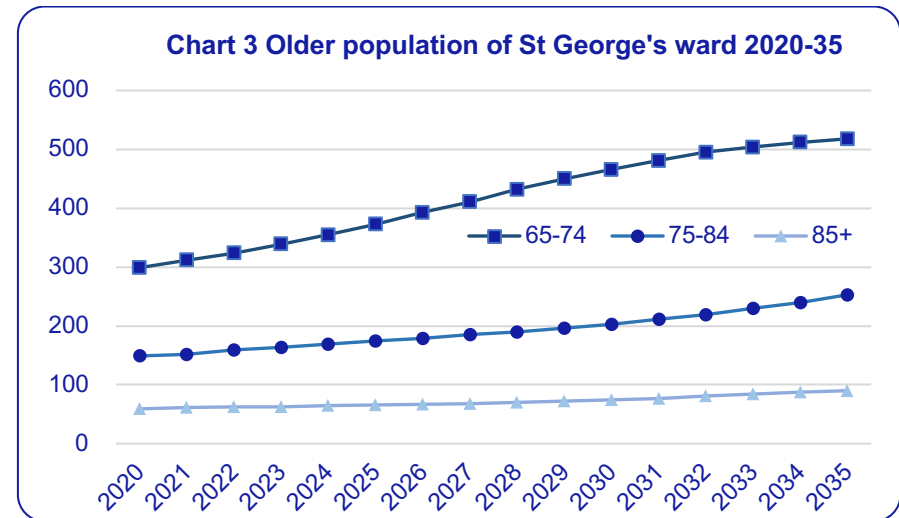
2.1.4 St George's ward

Chart 3 and Table c in the Appendix project the number of older people within St George's ward in Southwark by age band:

- number of older people is projected to grow by 70 per cent from 505 to 860 over the next fifteen years
- for people aged 65-74 the growth is by 73 per cent from 300 to 520
- for people aged 75-84 the growth is by 70 per cent from 150 to 255, and

- for the very old, 85 and over, the growth is by 53 per cent from 60 to 90.

The number of young adults is projected to increase by seven per cent over the period.



2.1.5 The three wards

Combining the three wards, Bishop's, Borough & Bankside and St George's, covers the area that is prioritised by CSCB.

Chart 4 and Table 1 project the number of older people within the three wards by age band:

- number of older people is projected to grow by 64 per cent from 2,430 to 3,980 over the next fifteen years
- for people aged 65-74 the growth is by 68 per cent from 1,485 to 2,495

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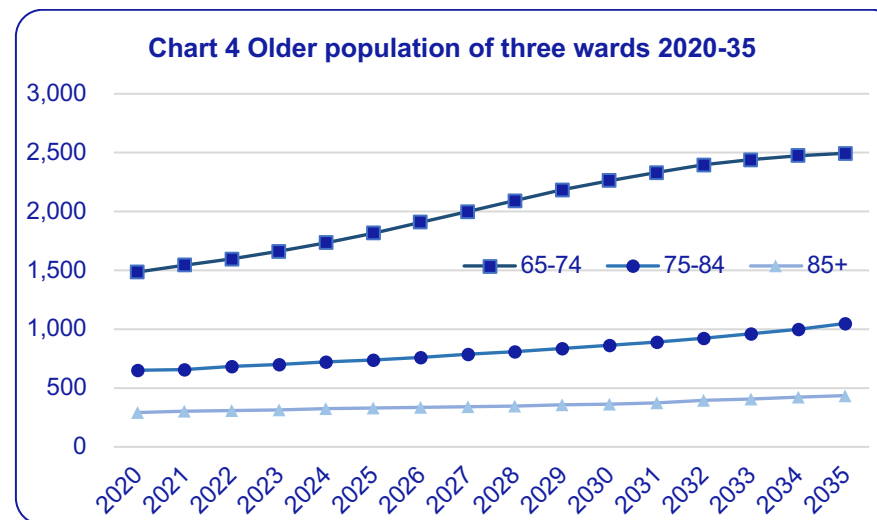
- for people aged 75-84 the growth is by 61 per cent from 650 to 1,050, and
- for the very old, 85 and over, the growth is by 49 per cent from 290 to 435.

The working age population of the three wards is projected to increase by only six per cent over the next 15 years, from 24,300 to 25,900 people (Table 1).

Table 1 Projected population in three wards 2020-35

	18-64	65-74	75-84	85+
2020	24,340	1,486	651	292
2021	24,444	1,546	658	302
2022	24,522	1,596	683	309
2023	24,613	1,663	702	315
2024	24,711	1,734	720	323
2025	24,793	1,818	740	333
2026	24,913	1,909	760	337
2027	25,045	1,998	785	341
2028	25,154	2,092	811	349
2029	25,286	2,183	834	356
2030	25,462	2,264	863	364
2031	25,624	2,331	893	373
2032	25,716	2,396	921	394
2033	25,787	2,440	960	408
2034	25,860	2,476	999	422
2035	25,916	2,495	1,049	436

The three wards are St George's, Borough & Bankside and Bishop's
 Source: derived by Kingsbury Hill Fox from ONS 2018-based subnational population projections



2.1.6 The three wards in 2027

The earliest likely opening date of the facility is 2027, by when the number of older people within the three wards will have increased:

- number of older people is projected to grow by 29 per cent from 2,430 to 3,125 over the next seven years
- for people aged 65-74 the growth is by 34 per cent from 1,485 to 2,000
- for people aged 75-84 the growth is by 21 per cent from 650 to 785, and
- for the very old, 85 and over, the growth is by 17 per cent from 290 to 340.

2.2 Population growth within two boroughs

2.2.1 Summary

The older population in all three older age bands will increase in each of the two boroughs over the next 15 years. In both boroughs combined the growth in the very old population (85+), who are the main group needing a care home place, is by 49 per cent from 7,200 to 10,800.

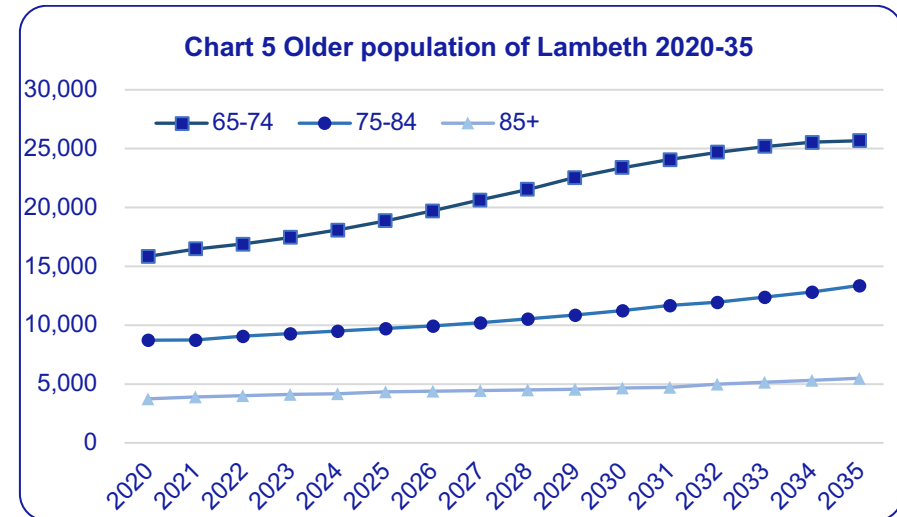
The earliest likely opening date of the facility is 2027, by when the number of older people within the two boroughs will have increased by 28 per cent from 56,300 to 72,000. The number of very old, 85 and over, will have grown by 17 per cent from 7,210 to 8,450.

2.2.2 Lambeth borough

Chart 5 and Table d in the Appendix project the number of older people within the borough of Lambeth by age band:

- number of older people is projected to grow by 57 per cent from 28,300 to 44,600 over the next fifteen years
- for people aged 65-74 the growth is by 62 per cent from 15,800 to 25,700
- for people aged 75-84 the growth is by 53 per cent from 8,700 to 13,400, and
- for the very old, 85 and over, the growth is by 47 per cent from 3,700 to 5,500.

The number of young adults is projected to increase by just two per cent over the period.

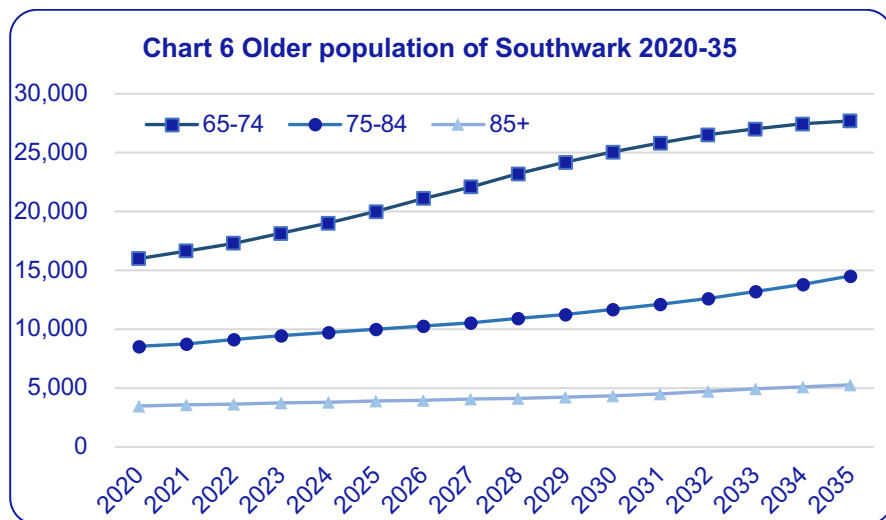


2.2.3 Southwark borough

Chart 6 and Table e in the Appendix project the number of older people within the borough of Southwark by age band:

- number of older people is projected to grow by 70 per cent from 28,000 to 47,500 over the next fifteen years
- for people aged 65-74 the growth is by 73 per cent from 16,000 to 27,700
- for people aged 75-84 the growth is by 70 per cent from 8,500 to 14,500, and
- for the very old, 85 and over, the growth is by 52 per cent from 3,500 to 5,300.

The number of young adults is projected to increase by four per cent over the period.

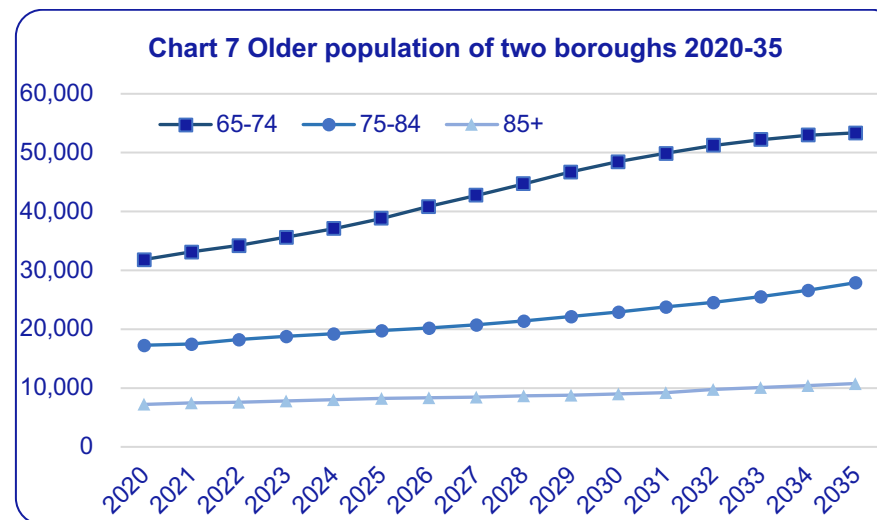


2.2.4 Two boroughs

Chart 7 and Table 2 project the number of older people within the boroughs of Lambeth and Southwark by age band:

- number of older people is projected to grow by 63 per cent from 56,300 to 92,000 over the next fifteen years
- for people aged 65-74 the growth is by 68 per cent from 31,800 to 53,400
- for people aged 75-84 the growth is by 62 per cent from 17,300 to 27,900, and
- for the very old, 85 and over, the growth is by 49 per cent from 7,200 to 10,800.

The number of young adults is projected to increase by three per cent over the period.



2.2.5 The two boroughs in 2027

The earliest likely opening date of the facility is 2027, by when the number of older people within the two boroughs will have increased:

- number of older people is projected to grow by 28 per cent from 56,300 to 72,000 over the next seven years
- for people aged 65-74 the growth is by 34 per cent from 21,800 to 42,700
- for people aged 75-84 the growth is by 20 per cent from 17,300 to 20,800, and
- for the very old, 85 and over, the growth is by 17 per cent from 7,210 to 8,450.

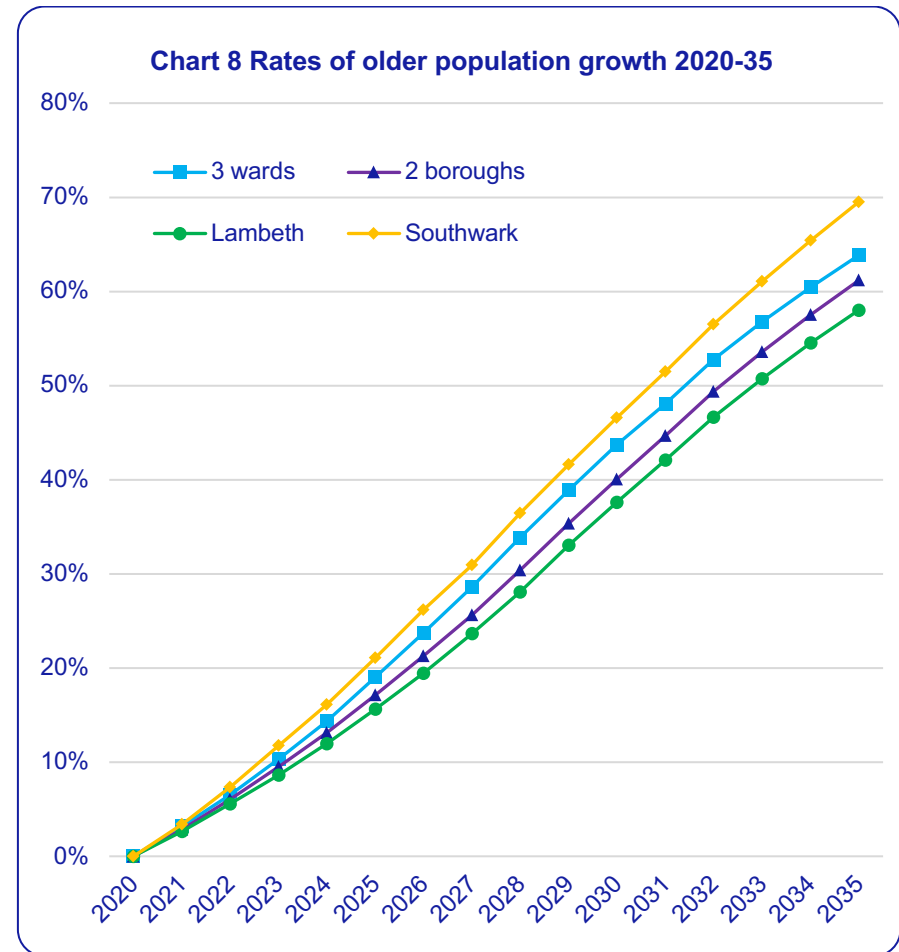
Table 2 Projected population in Lambeth & Southwark boroughs 2020-35

	18-64	65-74	75-84	85+
2020	468,171	31,844	17,273	7,214
2021	470,158	33,147	17,483	7,471
2022	471,675	34,190	18,213	7,634
2023	472,896	35,613	18,752	7,818
2024	473,743	37,077	19,253	7,984
2025	474,059	38,865	19,728	8,229
2026	474,298	40,825	20,197	8,367
2027	474,556	42,730	20,751	8,469
2028	474,652	44,724	21,419	8,640
2029	475,076	46,723	22,113	8,799
2030	476,118	48,444	22,900	9,016
2031	477,260	49,889	23,799	9,243
2032	478,220	51,234	24,555	9,714
2033	479,582	52,206	25,566	10,083
2034	481,183	52,959	26,617	10,417
2035	482,794	53,367	27,906	10,768

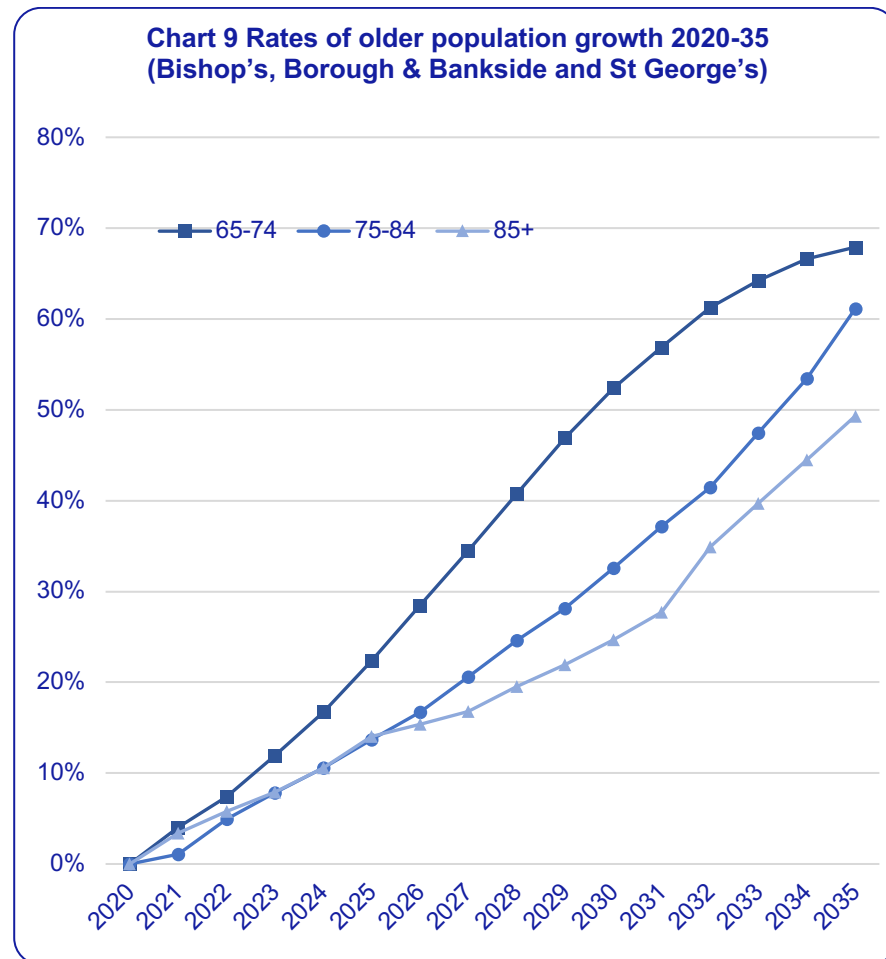
Source: derived by Kingsbury Hill Fox from ONS 2018-based subnational population projections

2.3 Rate of population growth

Southwark shows the highest rate of growth of its older population and Lambeth the lowest; the combined wards and boroughs are in-between (Chart 8 and Table h).



Across the three wards (Bishop's, Borough & Bankside and St George's) the young old age group will grow the most over the next 15 years followed by the 75 to 84-year band and then the very old, 85 and over (Chart 9 & Table i in the Appendix). By 2035 the annual rate of growth of the 75 to 84 population will be the fastest and within two years the cumulative growth of that age band will overtake the younger one.



2.4 Population growth north of the river

2.4.1 Summary

The total older population will increase by 38 per cent in the City over the next 15 years. The growth in the very old population (85+), who are the main group needing a care home place, is by 30 per cent from 190 to 245.

The earliest likely opening date of the facility is 2027, by when the number of older people within the City will have increased by 28 per cent from 1,620 to 1,860. The number of very old, 85 and over, will have reduced by four per cent from 190 to 180.

The total older population will increase by 58 per cent in the two Westminster wards of St James's and Vincent over the next 15 years. The growth in the very old population (85+), who are the main group needing a care home place, is by 76 per cent from 525 to 925.

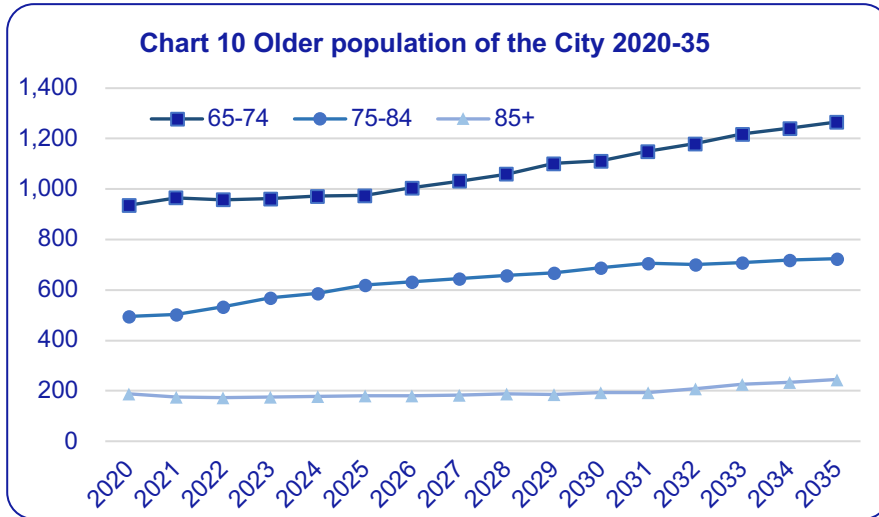
The earliest likely opening date of the facility is 2027, by when the number of older people within the two wards of St James's and Vincent will have increased by 25 per cent from 3,670 to 4,580. The number of very old, 85 and over, will have grown by 29 per cent from 525 to 675.

2.4.2 City of London

Chart 10 and Table f in the Appendix project the number of older people within the City of London by age band:

- number of older people is projected to grow by 38 per cent from 1,620 to 2,240 over the next fifteen years
- for people aged 65-74 the growth is by 35 per cent from 935 to 1,270
- for people aged 75-84 the growth is by 46 per cent from 495 to 725, and

- for the very old, 85 and over, the growth is by 30 per cent from 190 to 245.



The number of young (working age) adults, who will make up the nurses and care workers for these older people, is projected to reduce by three per cent, from 5,400 to 5,220, over the period.

These rates of growth are significantly lower than in the two boroughs, perhaps for reasons including the following:

- older people have to leave the City if they need to be admitted to a care home or enter extra care housing
- there is little inward migration of older people to the area, because there are few reasons to do so and because housing availability and pricing may preclude such migration
- older people may leave the City to be closer to their families.

2.4.3 City of London in 2027

The earliest likely opening date of the facility is 2027, by when the number of older people within the City will have increased:

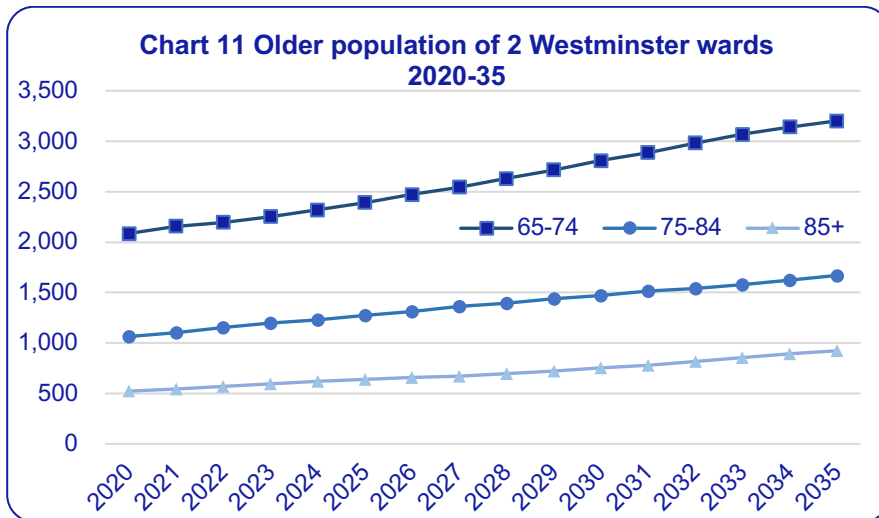
- number of older people is projected to grow by 28 per cent from 1,620 to 1,860 over the next seven years
- for people aged 65-74 the growth is by ten per cent from 935 to 1,030
- for people aged 75-84 the growth is by 30 per cent from 495 to 645, and
- for the very old, 85 and over, the growth is negative by four per cent from 190 to 180.

2.4.4 St James's and Vincent wards, Westminster

Chart 11 and Table g in the Appendix project the number of older people within the two Westminster wards of St James's and Vincent, which are adjacent to the river and run from the City to Vauxhall Bridge:

- the number of older people is projected to grow by 58 per cent from 3,670 to 5,800 over the next fifteen years
- for people aged 65-74 the growth is by 53 per cent from 2,090 to 3,200
- for people aged 75-84 the growth is by 57 per cent from 1,060 to 1,670, and
- for the very old, 85 and over, the growth is by 76 per cent from 525 to 925.

The working age population, 18-64 is projected to increase by seven per cent over the next 15 years, from 17,800 to 19,000.



2.4.5 St James’s and Vincent wards, Westminster in 2027

The earliest likely opening date of the facility is 2027, by when the number of older people within the two Westminster wards will have increased:

- number of older people is projected to grow by 25 per cent from 3,670 to 4,580 over the next seven years
- for people aged 65-74 the growth is by 22 per cent from 2,090 to 2,550
- for people aged 75-84 the growth is by 28 per cent from 1,060 to 1,360, and
- for the very old, 85 and over, the growth is by 29 per cent from 525 to 675.

3. Demand

3.1 Concept of age-standardised demand

3.1.1 Summary

Kingsbury Hill Fox uses a calculation based on population growth and the probability of being in a care home to derive an age-standardised demand for care home places and project this into the future.

A sustainable occupancy rate is considered to be around 90-92 per cent, which means that the need for beds is eight to ten per cent higher than ASD indicates.

3.1.2 Concept of age-standardised demand

Kingsbury Hill Fox projects the demand for care home places for older people by applying an age-standardised demand (ASD) formula reflecting the probability of being in a care home in the age bands 18-64, 65-74, 75-84 and over 85 in the UK to the resident population of an area. The bulk of residents, however, come from the older age bands. How the actual demand for care home places can differ from this projected demand is considered below.

Actual demand, therefore, will be different from age-standardised demand when local factors including the following differ from the current UK pattern:

- if there is less or greater local use of homecare as an alternative to residential care
- if fewer or more older people enter extra-care housing instead of a care home
- if an area attracts low-dependency older people who self-fund themselves in a care home

- if particularly low or high mobility among a population results in lower or higher levels of informal care being available from relations
- if prosperity or other factors make a population less or more healthy than average for its age
- if the geographical area is small compared with care homes' catchment areas
- if there are an unusually high number of people with what were preserved rights.

The major value of the ASD calculation is that it can be used to project future changes in demand, subject to patterns of care not changing over time. It is therefore a better measure of change in demand than it is of actual demand.

As with any such projections, the further ahead one projects the greater the 'funnel of uncertainty', that is the less accurate the projection.

This current and future demand will not necessarily be met by care home placements. Intensive homecare or extra-care housing provide alternative means to care for older people who might otherwise go into a care home. This is less the case with NH than for care only (residential) homes.

The formula cannot distinguish between care only (residential) beds and nursing beds as NH usually contain a mixture of care only and nursing beds.

3.2 Residents

3.2.1 Summary

A care home market does not operate at 100 per cent capacity; the optimum is 90-92 per cent.

There are different types of resident in different types of care home; in particular not every resident in a nursing home requires nursing care.

3.2.2 Occupancy rates

A sustainable care home market cannot run at 100 per cent occupancy; the void periods when a resident dies or goes permanently into hospital, which happens more frequently now that lengths of stay are shorter, make full occupancy impossible. There also needs to be some spare capacity to deal with winter pressures and other fluctuations in demand.

A sustainable occupancy rate is considered to be around 90-92 per cent, which means that the need for beds is eight to ten per cent higher than ASD indicates.

3.2.3 Types of resident

There are many ways to classify care home residents but for CSCB's purposes it is important to understand the following groups:

- special residents who are generally people with learning disabilities, mental health needs or complex conditions
- ordinary residents who are generally frail older people, people with dementia, physically disabled people or people with medical conditions

In care homes, therefore, there will be:

- special residents in specialised nursing homes

- special residents in specialised care only homes
- ordinary nursing residents in non-specialised nursing homes
- ordinary care only residents in non-specialised nursing homes
- ordinary care only residents in non-specialised care only homes.

Ordinary residents could be further subdivided into those with dementia and those not having dementia, although most residents have some level of mental impairment.

Ordinary residents could also be subdivided into those whose needs are for social care (ie local authority supported or self-funding) and those whose needs are for medical care (ie NHS funded).

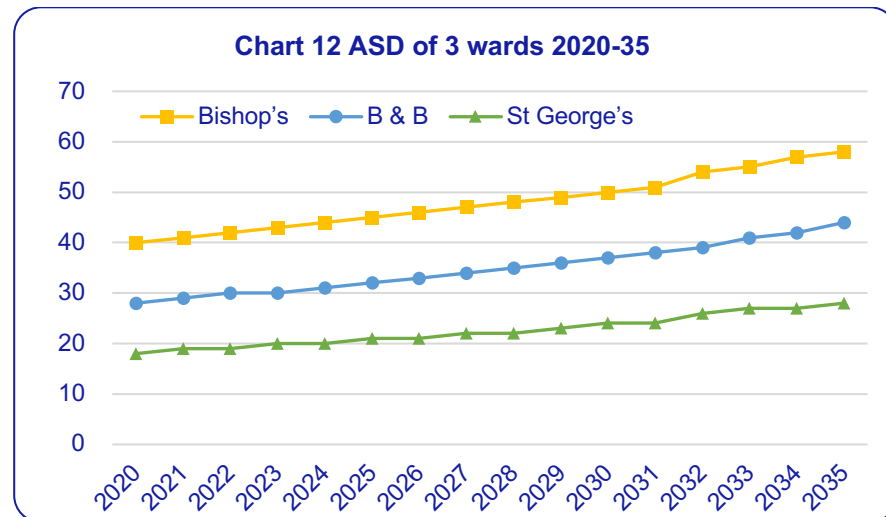
3.3 Age-standardised demand in the three wards

3.3.1 Summary

In 2020 the three Lambeth and Southwark wards have an age-standardised demand figure for 86 care home places; of this 79 (92%) come from older people and seven from younger adults.

In 2027 the three wards will have an age-standardised demand figure for 102 care home places; of this 95 (93%) will come from older people and eight from younger adults.

The current demand from older people of 79 places and projected demand in 2027 of 95 places both exceed the capacity of CSCB's proposed nursing home.



3.3.2 Age-standardised demand in Bishop's, Borough & Bankside and St George's wards now and in 2035

We have applied Kingsbury Hill Fox's ASD formula to our population projections for the three wards in Lambeth and Southwark. This has given the projected demand for care home places at current patterns of care within the wards shown in Chart 12, Table 3 and Table j in the Appendix.

In 2020 the three wards have an age-standardised demand figure for 86 care home places; of this 79 (92%) come from older people and seven from younger adults (Table k).

The greatest demand is from Bishop's ward with an ASD of 40 rising by 47 per cent to 58 places between now and 2035 (Chart 13 & Table j). Borough & Bankside ward shows a demand for 28 places rising by 54 per cent to 44 places over the 15 years and St George's 18 places rising by 56 per cent to 28.

The percentage increases in ASD are shown in Chart 13, showing the growth accelerating in 2030 but otherwise to be a fairly steady 51 per cent over 15 years.

3.3.3 Age-standardised demand in the three wards in 2027

The earliest likely opening date of the facility is 2027. By that time:

- ASD for Bishop's ward will have risen by 18 per cent to 47 beds
- ASD for Borough & Bankside ward will have risen by 19 per cent to 34 beds
- ASD for St George's ward will have risen by 20 per cent to 22 beds.

In 2027 the three wards will have an age-standardised demand figure for 102 care home places; after rounding 95 (93%) of this will come from older people and eight from younger adults (Table k).

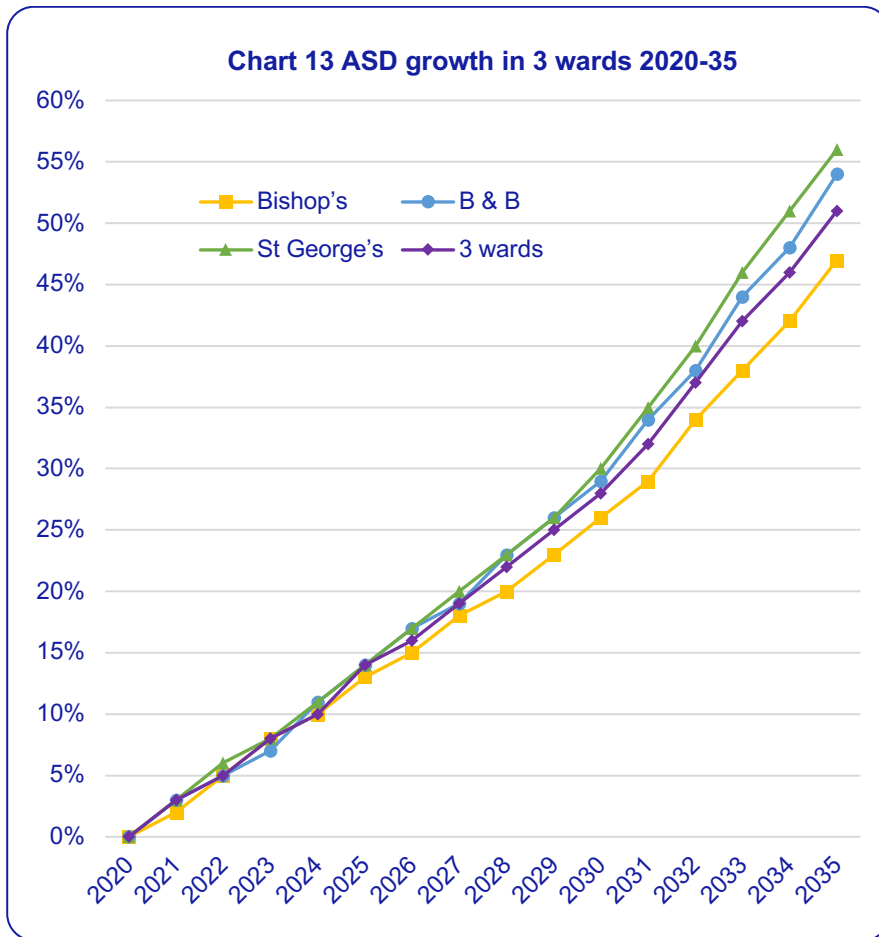


Chart 14 illustrates the extent to which the growth of demand from older people, 56 per cent over 15 years, will exceed that from young disabled adults (YDA), six per cent. These are projections based on existing patterns of care applied to population projections; in fact social services' practice is to divert people from registered care to supported housing or supported

living, and so the growth in demand from YDA is likely to be less and could go negative.

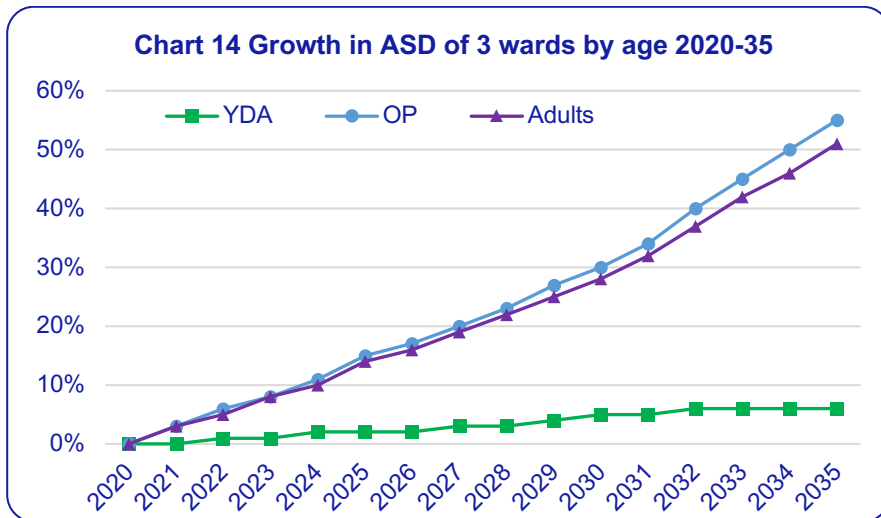
A similar pattern applies to the boroughs and north of the river and therefore ASD growth rates for those have not been shown in charts.

Table 3 Growth in ASD for care home places in Bishop's, Borough & Bankside and St George's wards 2020-35

	Bishop's	B & B	St George's	Three wards
2020	0%	0%	0%	0%
2021	2%	3%	3%	3%
2022	5%	5%	6%	5%
2023	8%	7%	8%	8%
2024	10%	11%	11%	10%
2025	13%	14%	14%	14%
2026	15%	17%	17%	16%
2027	18%	19%	20%	19%
2028	20%	23%	23%	22%
2029	23%	26%	26%	25%
2030	26%	29%	30%	28%
2031	29%	34%	35%	32%
2032	34%	38%	40%	37%
2033	38%	44%	46%	42%
2034	42%	48%	51%	46%
2035	47%	54%	56%	51%

B & B is Borough & Bankside

Source: derived by Kingsbury Hill Fox from its own ASD formula and ONS 2018-based subnational population projections



3.4 Age-standardised demand in Lambeth and Southwark

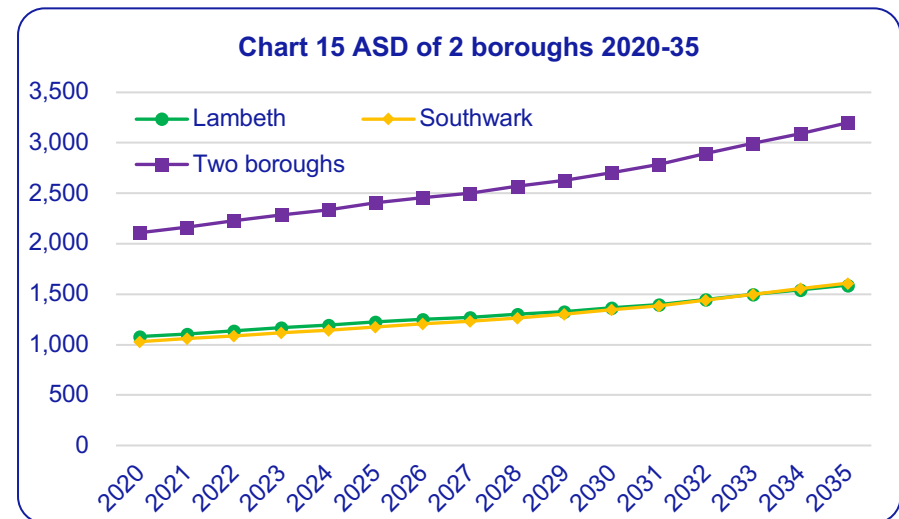
3.4.1 Summary

In 2020 Lambeth and Southwark have an age-standardised demand figure for 2,110 care home places; of this 1,970 (93%) come from older people and 140 from younger adults.

In 2027 the two boroughs will have an age-standardised demand that will have increased by 19 per cent to 2,500 beds; 2,360 beds for older people and 142 from younger adults.

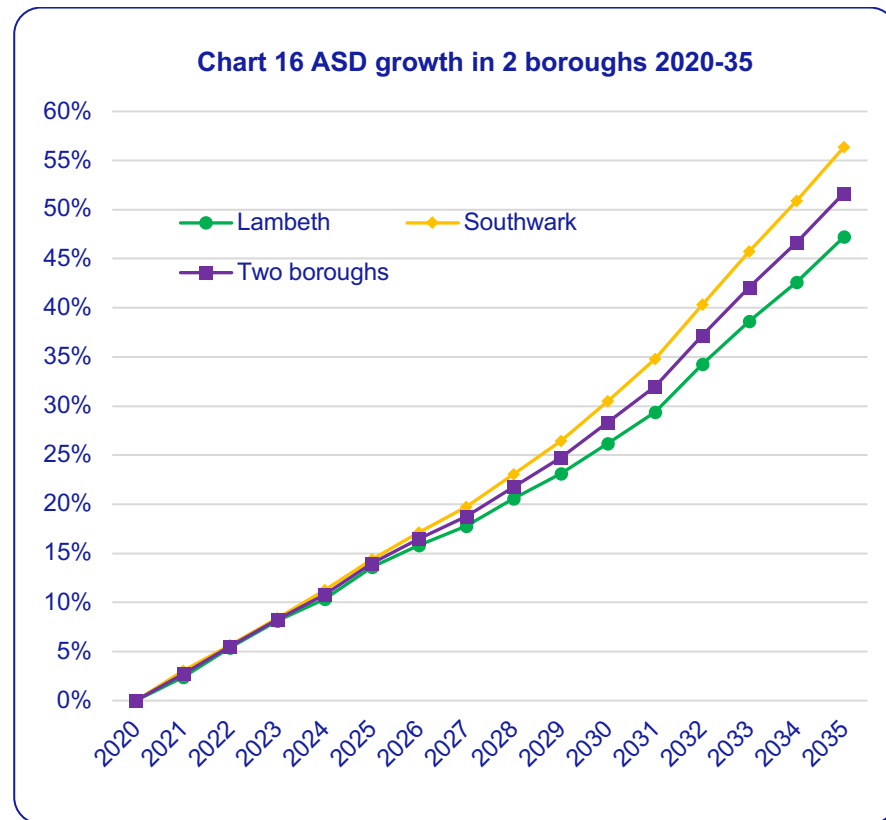
3.4.2 Age-standardised demand in in Lambeth and Southwark now and in 2035

We have applied Kingsbury Hill Fox's ASD formula to our population projections for Lambeth and Southwark. This has given the projected demand for care home places at current patterns of care within the boroughs shown in Chart 15, Table 4 and Table I in the Appendix.



In 2020 the two boroughs have an age-standardised demand figure for 2,110 care home places; of this 1,970 (93%) come from older people and 140 from younger adults (Table o).

The greatest demand is from Lambeth with an ASD of 1,080 rising by 49 per cent to 3,860 places between now and 2035 (Chart 15 & Table I). The borough of Southwark shows an ASD for 1,030 places rising by 56 per cent to 1,610 places over the 15 years.



The percentage increases in ASD are shown in Chart 16, showing the 51 per cent growth over 15 years to be fairly steady. The growth rates in demand from older people and young adults have not been compared as they are not dissimilar to Chart 14 for three wards.

Table 4 ASD growth for care home beds in Lambeth and Southwark 2020-35

	Lambeth	Southwark	Two boroughs
2020	0%	0%	0%
2021	2%	3%	3%
2022	5%	6%	6%
2023	8%	8%	8%
2024	10%	11%	11%
2025	14%	14%	14%
2026	16%	17%	16%
2027	18%	20%	19%
2028	21%	23%	22%
2029	23%	26%	25%
2030	26%	31%	28%
2031	29%	35%	32%
2032	34%	40%	37%
2033	39%	46%	42%
2034	43%	51%	47%
2035	47%	56%	52%

Source: derived by Kingsbury Hill Fox from its own ASD formula and ONS 2018-based subnational population projections

3.4.3 Age-standardised demand in Lambeth and Southwark in 2027

The earliest likely opening date of the facility is 2027. By that time:

- ASD for Lambeth borough will have risen by 18 per cent to 1,270 beds

- ASD for Southwark borough ward will have risen by 20 per cent to 1,230 beds
- ASD for the two boroughs will have risen by 19 per cent to 2,500 beds.

In 2027 the two boroughs will have an age-standardised demand figure for 2,360 beds for older people and 142 from younger adults (Table o).

3.5 Demand from north of the river

3.5.1 Summary

In 2020 the City has an age-standardised demand figure for 55 care home places rising by 35 per cent to 75 in 2035. St James's and Vincent wards in Westminster have an age-standardised demand figure for 140 care home places rising by 66 per cent to 232 in 2035. The ASD for the City and the two wards combined rises by 57 per cent from 195 in 2020 to 305 15 years later.

By 2027 ASD for the City will have risen by nine per cent to 60 beds and ASD for two wards in Westminster, St James's and Vincent, will have risen by 27 per cent to 177 beds, giving an ASD for the two boroughs will rise by 22 per cent to 238 beds.

People who work in the City or the centre of London could find it very convenient to have a relation in a care home where CSCB is planning its facility. Access by taxi, bus or tube is good and it is particularly convenient for those commuting via Waterloo, Cannon Street or London Bridge.

3.5.2 Demand from older people north of the river now and in 2035

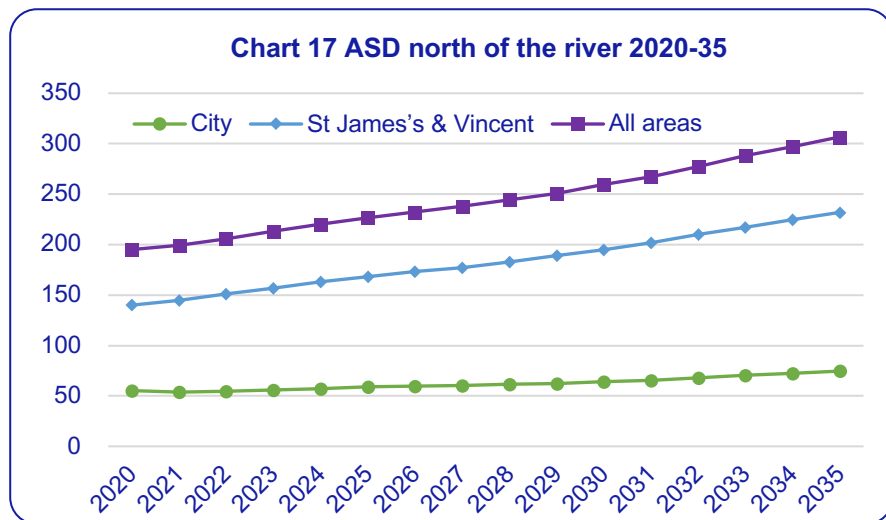
We have applied Kingsbury Hill Fox's ASD formula to our population projections for the City of London and to two wards in Westminster, St James's and Vincent wards.

In 2020 the City has an age-standardised demand figure for 55 care home places rising by 35 per cent to 75 in 2035. The small increase is because older people leave the City as they age and need care not available within it, and the other reasons considered in Section 2.4.1. After rounding 54 of these 55 (97%) come from older people and two from younger adults (Chart 17 & Table r).

The two wards in Westminster, St James’s and Vincent, have an age-standardised demand figure for 140 care home places rising by 66 per cent to 232 in 2035. Of this demand for 140 places, 134 (96%) come from older people and five from younger adults (Table t).

The growth rates of ASD in the City, in the two Westminster wards and in both combined are shown in Table 5.

The ASD for the City and the two wards combined rises by 57 per cent from 195 in 2020 to 305 15 years later (Tables 5 & v).



3.5.3 Demand from older people north of the river in 2027

The earliest likely opening date of the facility is 2027, by when:

- ASD for the City will have risen by nine per cent to 60 beds
- ASD for two wards in Westminster, St James’s and Vincent, will have risen by 27 per cent to 177 beds

- ASD for the two boroughs will have risen by 22 per cent to 238 beds.

Table 5 Growth in ASD for care home places in wards north of the river 2020-35

	City	St James & Vincent	Total
2020	0%	0%	0%
2021	1%	2%	2%
2022	1%	6%	6%
2023	2%	10%	9%
2024	2%	13%	13%
2025	2%	17%	16%
2026	3%	20%	19%
2027	3%	23%	22%
2028	3%	26%	25%
2029	3%	30%	29%
2030	4%	34%	33%
2031	4%	38%	37%
2032	4%	44%	42%
2033	4%	49%	48%
2034	4%	54%	52%
2035	4%	59%	57%

The area is the City of London and in Westminster St James’s and Vincent wards
 Source: derived by Kingsbury Hill Fox from its own ASD formula and ONS 2018-based subnational population projections

3.6 Demand from working age relations

Years ago older people tended to choose a care home close to where they lived, so that they could continue to visit familiar places and friends and family could visit them easily. More recently the people who enter a care home are often too frail to go out and their friends may have already passed away. There is a tendency now, therefore, for older people to find a care home that is convenient for their younger family members.

People who work in the centre of London, north and south of the river, could find it very convenient to have a relation in a care home on the site where CSCB is planning its facility. They could visit at lunch time or on their way to or from work. Younger adults with older relations who live in the centre of London might also value this convenience.

Access to the site by taxi, bus or tube is good and it is particularly convenient for those commuting via Waterloo, Cannon Street or London Bridge.

3.7 Demand and AVLOS

Since the community care reforms of 1993 central and local government policy has been to keep older people in their own homes with intensive homecare rather than admitting them to a care home; their own homes may be the original home dispersed in the community or a new extra care housing unit. This offers a better quality of life for the older person and is generally less expensive for the council.

Lambeth and Southwark Councils follow this policy. For example, in the chapter *Better Services and more Support for Vulnerable Residents*, Lambeth's 2017 Housing Strategy has a key outcome:

Ensure older people and those with support needs have a range of housing options to suit their needs, including assistance to remain in their own home with aids and adaptations where this is appropriate, or support to move or downsize to a more manageable home.

As a consequence the average lengths of stay (AVLOS) in care homes have been dropping for many years now as extra care and intensive homecare keep people in their own homes for longer, and therefore people are older and more dependent when they enter care homes. As a result resident turnover is higher than it used to be.

The NHS acts as a sort of gatekeeper for nursing care, however, as it is an NHS assessor's decision whether nursing care is essential and therefore whether NHS Funded Nursing Care is awarded. We are not aware of any credible evidence that lengths of stay in nursing care are still reducing, and it is likely that the largest reductions in AVLOS are for personal care only.

The Councils can support many of its older residents in their own homes if all they need is personal care, but if nursing care is required they would have to rely on an overstretched community nursing service. Our view is that the Council will find the facility a valuable resource in caring for its nursing patients.

4. Supply of care homes

4.1 Types of care and care home

4.1.1 Summary

There are two main classes of care home:

- **care only homes (previously called residential homes) provide personal care and support but when nursing input is required this is provided by the community nursing service (previously called district nurses)**
- **nursing homes similarly provide personal care and support but there is always a registered nurse on site to provide or supervise nursing care.**

4.1.2 Types of care home

Care homes cannot provide nursing care, but many nursing homes cater for people who need nursing care and also people who do not and who could be in a care only home. People in nursing homes are usually more dependent than people in care only homes; many are unable to leave their beds.

The NHS sometimes pays for people who need to be in a care homes under what is called NHS Continuing Health Care; these patients are almost always in nursing homes.

Most care home beds are for older people; these may be care only homes or nursing homes. They tend to be large as economies of scale make care homes of 60 and more beds the most financially viable, although to keep a 'home' atmosphere these are usually divided into smaller living units these days.

Most older people in care homes have some form of dementia or at least confusion, but some homes specialise in this disease and are specifically registered for its care. Others will have specialised dementia units within a general older people's homes.

Physically disabled people may be cared for in special PD homes or in homes for older people. There is an overlap between frail older people and older people with a physical disability. We have therefore counted homes for physical disability as non-specialised in our analyses as they may provide a market opportunity/competition to Coin Street.

Specialised care homes for people with learning disabilities are usually much smaller, between four and ten beds, and are usually care only homes. Government and local authority policy is to transfer people from registered care homes to supported living, which is considered to provide a more natural lifestyle (and saves local authorities money as housing benefit pays for the accommodation).

Specialised care homes for people with mental health needs are usually care only but some do provide nursing care. They are generally somewhat larger than care homes for learning disabilities but smaller than older people's homes. Whereas people with learning disabilities are there for life a stay in a care home for mental health is generally temporary to allow the problems to be addressed.

There are other specialised care homes, such as for eating disorders (a form of mental health) and acquired brain injury; these are usually nursing homes.

4.2 Care homes within a reasonable distance

4.2.1 Summary

We identified no care homes for older people in Bishop's, Borough & Bankside or St George's wards. Of the four closest non-specialised care homes three are north of the river.

The nearest non-specialised care home within Lambeth and Southwark is *Tower Bridge Care Centre*, a corporately owned purpose-built 128-bedroom nursing home for older people and dementia 1.5 miles from the proposed development. The next nearest is *St Peters Residence*, a charitable 56-bedroom nursing home for older people 1.7 miles away in Lambeth.

In total the boroughs have 1,315 non-specialised beds of which 72 per cent are in nursing homes and 28 per cent are in care only homes.

North of the river we identified no care homes in the City, four non-specialised care homes nearby in Westminster with 237 beds, three nearby in Islington with 138 beds, four nearby in Tower Hamlets with 227 beds, one home nearby in Hackney with 50 beds and two nearby in Kensington & Chelsea with 83 beds.

South of the river in Wandsworth, close to the Albert Embankment, are 27 nursing beds in an eye-wateringly expensive extra care housing development.

4.2.2 Close to the site

We identified no care homes for older people in Bishop's, Borough & Bankside or St George's wards. There are two care only homes for young adults with learning disabilities in St George's ward with nine beds between them.

The closest non-specialised care homes are north of the river. In Charterhouse Square, Islington, there is the 11-bedroom *Queen Elizabeth II Infirmary*, which offers nursing care and is run by the *Governors of Sutton's Hospital in Charterhouse*. It cares primarily for sick brothers of the Sutton Hospital (who incidentally are not part of a religious order but are tenants of the Hospital and who are eligible as single men over 60 who are suited to community life, in good health, able to lead an independent life and of limited financial means with a real housing need) and so is only rarely available to the public.

The second closest is *Norton House*, an *Anchor Trust* owned care home in Victoria. It offers care only and has 40 places; all placements are made by referral from Westminster Council and so it would not be available to people from the Coin Street area.

Third equal closest, both 1.5 miles away, come the *Tower Bridge Care Centre* to the east with 128 privately-run nursing beds and the *Garside House* nursing home with 40 beds run by *Sanctuary Care* in Vincent ward, Westminster.

4.2.3 Within Bishop's, Borough & Bankside and St George's wards

There are two care only homes for young adults with learning disabilities in the three wards, both in St George's ward with nine beds between them. There are no non-specialised care homes for older people in Bishop's, Borough & Bankside or St George's wards.

4.2.4 Within Lambeth and Southwark

The nearest non-specialised care home within the boroughs of Lambeth and Southwark is *Tower Bridge Care Centre*, a corporately owned (*HC-One*) purpose-built 128-bedroom nursing home offering dementia, nursing, residential and respite care. It is in Southwark at the junction of Old Kent Road, New Kent Road and Tower Bridge Road, 1.5 miles from the proposed development. The next nearest, 1.7 miles away, is *St Peters Residence*, a

56-bedroom nursing home operated by the charitable *Little Sisters of the Poor* for older people on a Peabody Estate in Oval ward, Lambeth.

The other care homes within the two boroughs are listed in Table x in the Appendix and summarised in Table 6. Lambeth has 796 non-specialised beds of which 91 per cent are in nursing homes and nine per cent are in care only homes. Southwark has 519 non-specialised beds of which 42 per cent are in nursing homes and 58 per cent are in care only homes.

In total there are 1,315 non-specialised beds of which 72 per cent are in nursing homes and 28 per cent are in care only homes.

Table 6 Available care home places by care type and borough

	Lambeth		Southwark	
	nursing	care only	nursing	care only
Non-specialised	727	69	217	302
Specialised	66	234	0	63

Source: derived by Kingsbury Hill Fox from CQC data

In total including specialised beds there are 1,678 beds in the two boroughs of which 60 per cent are in nursing homes and 40 per cent are in care only homes.

4.2.5 North of the river

There are no care homes in the City of London. We identified two non-specialised homes in the two catchment wards in Westminster. These are:

- *Norton House*, a 40-bed care only home owned by the voluntary sector *Anchor Hanover* 1.2 miles away in St James's ward and open only to Westminster residents

- *Garside House Nursing Home*, a 40-bed nursing home owned by the voluntary sector *Sanctuary Care* 1.5 miles away in Vincent ward.

Table 7 Non-specialised homes within 3 miles

Name	Sector	Class	Beds	Dist.
Queen Elizabeth II Infirmary	V	NH	11	1.0
Norton House	V	c/o	40	1.2
Garside House Nursing Home	V	NH	40	1.5
Tower Bridge Care Centre	P	NH	128	1.5
St Peters Residence	V	NH	56	1.7
St Georges Nursing Home	P	NH	44	1.7
Bridgeside Lodge Care Centre	P	NH	64	1.8
Muriel Street Resource Centre	P	NH	63	1.9
Ashley Cooper House	V	c/o	16	2.3
Mary Seacole Nursing Home	NHS	NH	50	2.3
Silk Court Care Home	V	NH	51	2.4
The Margaret Thatcher Infirmary	V	NH	68	2.5
Bluegrove House	V	c/o	48	2.5
Waterside	V	c/o	48	2.5
Havelock Court Care Home	P	NH	60	2.6
Love Walk	V	c/o	31	2.7
The Laurels Care Centre	P	NH	68	2.7
Chelsea Court Place	P	NH	15	2.8
Hawthorn Green Residential and Nursing Home	P	NH	90	2.9
Albert Suites at Battersea Place	P	NH	27	3.0
Westport Care Home	P	c/o	44	3.0
Beaumont Court Care Home	P	c/o	42	3.0

Source: Tables x & y in the Appendix

Review of Nursing Home Plans for Coin Street

Homes outside the catchment area but also in Westminster include:

- *St Georges Nursing Home*, a privately-owned 44-bed nursing home for older people and those with dementia 1.7 miles away
- *Forrester Court*, a corporate-owned 113-bed nursing home for older people 3.6 miles away.

In Islington we identified three non-specialised care homes nearby:

- *Queen Elizabeth II Infirmary*, a charitable 11-bed older people's nursing home with restricted eligibility for admission one mile away
- *Bridgeside Lodge Care Centre*, a privately-owned 64-bed nursing home primarily for older people 1.8 miles away
- *Muriel Street Resource Centre*, a corporate 63-bed nursing home for older people and those with dementia 1.9 miles from the site.

In Tower Hamlets we found:

- *Silk Court Care Home*, an *Anchor Hanover*-owned 51-bed nursing home primarily for older people 2.4 miles away
- *Hawthorn Green Residential and Nursing Home*, a privately-owned 90-bed nursing home primarily for older people 2.9 miles away
- *Westport Care Home*, a privately-owned 44-bed care only home primarily for older people three miles away
- *Beaumont Court Care Home*, a privately-owned 42-bed care only home primarily for older people three miles away

In Kensington & Chelsea we identified two non-specialised care homes nearby:

- *The Margaret Thatcher Infirmary*, a 68-bed older people's nursing home run by the *Royal Hospital* and so probably for Chelsea Pensioners 2.5 mile away

- *Chelsea Court Place*, a privately-owned 15-bed nursing home primarily for people with dementia 2.8 miles away

In Hackney the NHS operates the *Mary Seacole Nursing Home*, a 50-bed nursing home primarily for older people 2.3 miles away.

Although not north of the river, the *Albert Suites* is the corporate *LifeCare Residences's* 27-bed nursing home at *Battersea Place*, its eye-wateringly expensive extra care housing development near the Albert Embankment overlooking Battersea Park three miles away in Wandsworth.

4.2.6 Planned care homes

Details of recent planning applications within the relevant areas are set out in Appendix 2. Several of these are for extra care housing, but some are care homes.

The most relevant is a proposed 102-bedroom care home at 81 Picton Street in Camberwell Green ward, Southwark, 2.4 miles away from Gabriel's Wharf.

Burgess Park Care home was operated by Four Seasons and in July 2015 was rated 'Inadequate'. It appears to have been purchased by Country Court Care in November 2017 and closed in early 2018. The new owner was granted permission to demolish it and build a 92-bedroom care home in late 2017 and applied to change this to 102 beds in August 2020.

If this consent is granted and the 102-bedroom facility is built it will not affect the conclusions of this report.

4.3 The London care home market

4.3.1 Summary

London has approximately only three-quarters as many beds per 100,000 people 85 and over compared with England. The number of care home beds in London had dropped by 11 per cent in London compared with five per cent in England during the five years to 2019. London has the highest proportion of care home residents that are fully funded by the local authority.

4.3.2 CQC's analysis

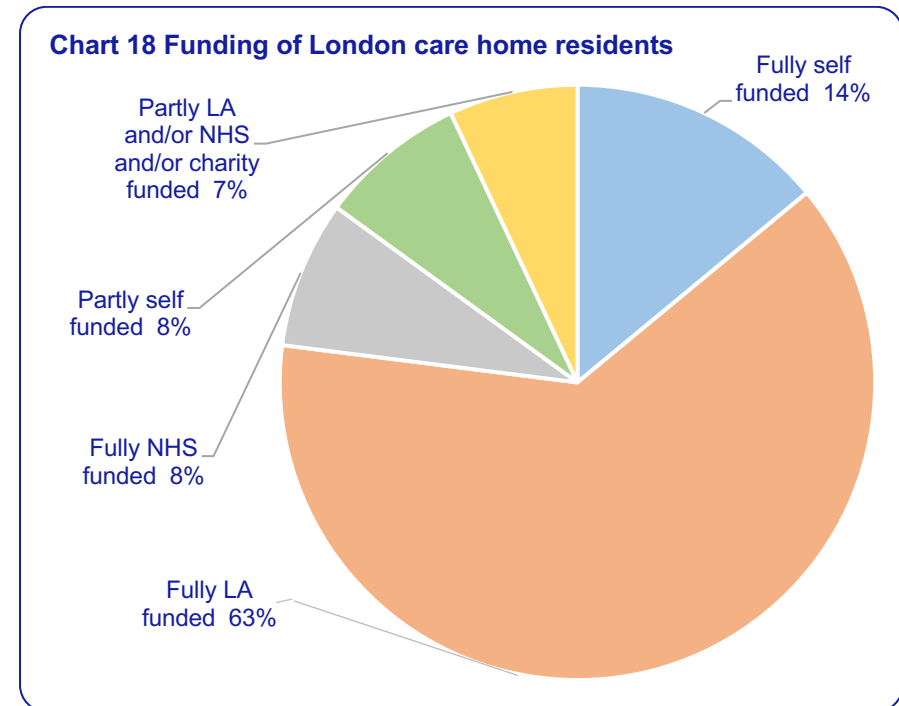
We are quoting below two paragraphs from CQC's *State of Care 2019*:

“Looking at capacity, the number of residential and nursing home beds has been falling steadily in all regions over the last five years, which reflects a national and local ambition to support people to remain at home for as long as possible. London has a much lower number of beds per 100,000 people aged 85 and over compared with the North East, but both have seen their bed numbers decrease by 11% over the period – the highest decrease of all regions.”

CQC reported that the number of care home beds in London had dropped by 11 per cent in London compared with five per cent in England. London has approximately 22,500 beds per 100,000 people 85 and over compared with almost 28,000 for England. In London only 22 per cent of residents are fully or partly self-funding and 78 per cent are fully or partly local authority funded.

Generally voluntary and private sector operators develop new care homes in areas where there is a large self-funding sector at economic prices.

Few care homes are developed in areas where they would rely on local authority funding, as such a home is unlikely to be economically viable without the cross-subsidy provided by self-funding residents.



Nearly two-thirds (63%) of care home residents in London are fully funded by their borough (Chart 18). Another 15 per cent have partial local authority funding; either because they have income or capital between the upper and lower limits, or because they have chosen to enter a care home that is more expensive than the borough would fund and so pay a top-up fee. The NHS fully funds eight per cent and another 14 per cent of residents fully self-fund themselves. Seven per cent are funded by a mixture of state agencies and/or charitable bodies.

5. Health and medical conditions

5.1 Medical needs of nursing home residents

Residents in nursing homes may be there as self-funding or local authority-supported older people, or for specific medical conditions often funded by the NHS under NHS Continuing Health Care. The reasons for admission of younger nursing home residents are similar to those for older people.

Younger adults can present with similar illnesses and issues as older people but often due to early onset of a disease, congenital or acquired, especially when at the advanced stages. In addition to conditions resulting from accidents (such as ABI) residents' medical needs may include:

Quadriplegia	Stroke
Cardiac issues	Renal failure
Severe epilepsy	Severe dementia
Multiple sclerosis	Parkinson's disease
Muscular dystrophy	Motor neurone disease
Acquired brain injury	PEG or intravenous feeding
	Severe or uncontrolled diabetes

Where these conditions occur alone they can sometimes be treated in care only homes or the patient's own home, with district nurses covering the nursing needs, but when there are complex needs (ie more than one) or 24 hour nursing care is required a nursing home is usually the better, most economic or necessary option.

The NHS may place people with a range of terminal illnesses under NHS Continuing Health Care.

5.2 Health indicators

5.2.1 Summary

At age 65 men and women in Lambeth and Southwark can expect to live for fewer years than the average across London as a whole.

Men in both boroughs, therefore, will encounter ill health at a younger age than is average for London. Women in Lambeth will encounter ill health earlier than the average for women across London. Women in Southwark, however, will live in good health for longer than is the average for women in London.

Men in Lambeth will encounter a life-limiting disability at a younger age than is average for London but women in both boroughs and men in Southwark will live longer without a disability than is average for their gender across London.

5.2.2 Life Expectancy

At birth the life expectancy of men in Lambeth and Southwark, at 79.2 years and 79.3 years respectively, is lower than for London as a whole, 80.7 years (Table 8).

At age 65 men in Lambeth and Southwark can expect to live for another 18.5 years and 18.3 years respectively, lower than the 19.5 years across London as a whole.

At birth the life expectancy of women in Lambeth at 83.7 years is lower than for London as a whole, 84.5 years, but women in Southwark live slightly longer than the London average at 84.6 years.

At age 65 women in Lambeth and Southwark can expect to live for another 21.5 years and 22.2 years respectively, less than the 24.6 years across London as a whole.

Table 8 Life expectancy in London 2016-18

	Lambeth	Southwark	London
Life expectancy at birth			
Males	79.2	79.3	80.7
Females	83.7	84.6	84.5
Life expectancy at age 65			
Males	18.5	18.3	19.5
Females	21.5	22.2	24.6

Source: Office for National Statistics

The life expectancies of men in Lambeth and Southwark are lower than the average for London both at birth and at age 65.

Women in Southwark have a slightly above average life expectancy at birth but by age 65 their life expectancy and that of men in the two boroughs has become shorter than the London average.

5.2.3 Healthy Life Expectancy

Healthy life expectancy estimates lifetime spent in “very good” or “good” health and is based on how individuals perceive their general health:

- at birth the healthy life expectancy of men in Lambeth and Southwark, at 60.9 years and 62.7 years respectively, is lower than for London as a whole, 64.2 years (Table 9)
- at age 65 men in Lambeth and Southwark can expect to live in good health for another 7.7 years and 8.8 years respectively compared with 10.3 years across London as a whole
- at birth the healthy life expectancy of women in Lambeth and Southwark, at 62.8 years and 66.3 years respectively, is lower than for London as a whole, 64.4 years

- at age 65 women in Lambeth and Southwark can expect to live in good health for another 10.2 years and 13.1 years respectively compared with 10.7 years across London as a whole.

Table 9 Healthy life expectancy in London 2016-18

	Lambeth	Southwark	London
Healthy life expectancy at birth			
Males	60.9	62.7	64.2
Females	62.8	66.3	64.4
Healthy life expectancy at age 65			
Males	7.7	8.8	10.3
Females	10.2	13.1	10.7

Source: Office for National Statistics

Men in both boroughs, therefore, will encounter ill health at a younger age than is average for London. Women in Lambeth will encounter ill health earlier than the average for women across London. Women in Southwark, however, will live in good health for longer than is the average for women in London.

5.2.4 Disability-free Life Expectancy

Disability-free life expectancy estimates lifetime free from a limiting persistent illness or disability; this is based upon a self-rated assessment of how health conditions and illnesses reduce an individual’s ability to carry out day-to-day activities:

- at birth the disability-free life expectancy of men in Lambeth and Southwark, at 64.5 years and 65.8 years respectively, are quite close to that for London as a whole, 65.0 years (Table 10)

- at birth the healthy life expectancy of women in Lambeth and Southwark, at 64.6 years and 66.0 years respectively, is higher than for London as a whole, 63.2 years.

Table 10 Disability-free life expectancy at birth in London 2016-18

	Lambeth	Southwark	London
Males	64.5	65.8	65.0
Females	64.6	66.0	63.2

Source: Office for National Statistics

Men in Lambeth will encounter a life-limiting disability at a younger age than is average for London but women in both boroughs and men in Southwark will live longer without a disability than is average for their gender across London.

5.3 Health reports for Southwark

5.3.1 Summary

Southwark scores better than average for London in some measures and worse on others; the health picture is mixed and a generalisation is not useful.

5.3.2 Health in Southwark

The following information on Southwark and its wards comes from work done for Southwark Council’s Joint Strategic Needs Assessment and from Public Health England.

Southwark’s older people break their hips more than Londoners do but at least the borough’s residents’ cancers are diagnosed early (Table 11). Unfortunately their diabetes is less likely to be diagnosed but on the other hand their dementia is more likely to be found.

Table 11 Selected health indicator indexes Southwark 2016-2019

	Southwark	London	England
Emergency hospital admissions for intentional self-harm	122.4	83.4	193.4
Hip fractures in people aged 65 and over	503	485	558
Cancer diagnosed at early stage	54.0%	52.7%	52.2%
Estimated diabetes diagnosis rate	66.2%	71.4%	78.0%
Estimated dementia diagnosis rate (aged 65 and over)	74.8%	72.6%	68.7%

Source: Public Health England

5.3.3 Health in Borough & Bankside

The 1,000 new incidences of cancer in Borough & Bankside (B & B) are similar to the borough and London.

The standardised admission ratio (where England is 100) for emergency admissions for hip fractures among the 65 and overs in B & B is 101 compared with 90 in Southwark and 89 in London. The standardised mortality ratio for preventable causes is 129 in B & B, higher than 104 in Southwark and 89 in London.

Of 12 health and related indicators B & B scores significantly poorer than Southwark in two, insignificantly poorer in three, insignificantly better in seven and significantly better in none.

5.3.4 Health in St George's

While Southwark has an emergency admission rate five per cent less than England's St George's is 27 per cent above England's. The standardised admission ratio in St George's is 127 compared with 95 for Southwark.

The 1,000 new incidences of cancer in St George's are similar to the borough and London.

The standardised admission ratio (where England is 100) for emergency admissions for hip fractures among the 65 and overs in St George's is 83 compared with 90 in Southwark and 89 in London. The standardised mortality ratio for preventable causes is 173 in St George's, much higher than 104 in Southwark and 89 in London.

Of 12 health and related indicators St George's scores significantly poorer than Southwark in three, insignificantly poorer in three, insignificantly better in five and significantly better in one.

5.3.5 Health profile of Cathedrals ward

Borough & Bankside and St George's wards were previously combined as Cathedrals ward. From the 2017 Southwark document *Southwark Ward Profiles Cathedrals Ward* we have extracted the following:

- Cathedrals has 9% fewer hospital admissions for coronary heart disease than England
- Cathedrals has 51% fewer hospital admissions for stroke than England
- Cathedrals has 41% fewer hospital admissions for myocardial infarction than England
- Cathedrals has 150% more hospital admissions for chronic obstructive pulmonary disease (COPD) than England.

5.4 Health reports for Lambeth

5.4.1 Summary

Lambeth residents are more physically active and less overweight than Londoners, but they smoke and drink more and their mental health is worse. Bishop's ward is typical of the borough.

5.4.2 Health of Lambeth

In the borough of Lambeth 20.3 per cent of adults are physically inactive, beating London where 27.0 per cent are stationary. This may be why Lambeth people are less overweight, 49.6 per cent compared with 58.4 per cent in London.

Lambeth smokes a little more than London; 18.1 per cent compared with 17.0 per cent. The borough has 626 admission episodes for alcohol related conditions per 100,000 population compared with 541, making it the 5th worst borough.

One point two six per cent of Lambeth residents are on register for severe mental illness compared with 1.05 per cent in London. The mortality rate from preventable causes index is 205, making it worse than London at 170.

Other adult indicators where Lambeth scores worse than London include:

- Smoking related deaths (333.3 per 100,000 vs 275.9)
- Under 75 cancer mortality (152.6 per 100,000 vs 132.6)
- Incidence of TB43 - 26.6 per 100,000 population compared with 13.5 in England as a whole.

The Lambeth document *State of the Wards 2016* says that health outcomes, such as life expectancy, in Bishop's ward are typical of the borough.

6. Comparing supply and demand

6.1 Supply and demand

6.1.1 Summary

We have based our comparisons on age-standardised demand (ASD), but a sustainable occupancy rate is considered to be around 90-92 per cent, which means that the need for beds is eight to ten per cent higher than ASD indicates.

There is currently an undersupply of nursing beds in Lambeth and Southwark, and particularly so in their three most relevant wards. By 2027, the earliest date that the proposed care home could open, this undersupply will be worse.

There are no non-specialised care homes in the three Lambeth and Southwark wards. By the earliest CSCB's proposed 76-bedroom nursing home could open, 2027, demand would be for 95 older people's beds which would easily exceed the capacity of the proposed home.

The supply of nursing beds in Lambeth and Southwark is already a little below the level ASD would indicate and would come closer to balance with the addition of CSCB's proposed nursing home. By the earliest it could open, 2027, projected demand at current patterns of care would easily exceed the anticipated supply in the boroughs even with CSCB's beds.

The demand for nursing beds from the City and the two wards in Westminster is more than double the supply.

There will be a further demand for care home places not from older people who live locally but from younger adults living or working in

the centre of London either side of the river who have older or disabled relations.

6.1.2 In Bishop's, Borough & Bankside and St George's wards

In 2020 the three wards have a total age-standardised demand figure for 86 care home places assuming 100 per cent capacity; of this 79 (92%) come from older people and seven from younger adults (Section 3.2 & Table k).

There are no care home places other than specialised ones for learning disabilities in the three wards, so ward residents have to leave the wards to find a care home place or have to find an alternative such as extra care housing - of which there is none in the wards – or intensive homecare.

Approximately 48 per cent of care home beds are in nursing homes; this does not mean that 48 per cent of residents require nursing care as nursing homes often have a mixture of residents who need nursing and those for whom personal care only is sufficient. Demand for nursing places from all residents within the wards is therefore approximately 42 places.

By the earliest it could open, 2027, demand for CSCB's proposed 76-bedroom nursing home would be for 95 older people's beds which would easily exceed the capacity of the proposed home. There would also be some demand from young adults who do not need specialised care.

6.1.3 In Lambeth and Southwark

In 2020 the two boroughs have a total age-standardised demand figure for 2,110 care home places; of this 1,970 (93%) come from older people and 140 from younger adults (Section 3.3 & Table o). The total demand for nursing beds is approximately 1,010.

In total there are 1,315 non-specialised beds of which 944 (72%) are in nursing homes and 28 per cent are in care only homes.

The current supply of nursing beds in the two boroughs is therefore below the level age-standardised demand would indicate and this would come closer to balance with the addition of CSCB's proposed nursing home.

By the earliest it could open, 2027, demand would be for 2,360 beds for older people beds at current patterns of care which would easily exceed the current supply in the boroughs.

The planned 102-bedroom care home in Burgess Park (Camberwell Green) would have a minor effect on this shortage.

6.1.4 North of the river

In 2020 the City has an age-standardised demand for 55 care home places and the two wards in Westminster, St James's and Vincent, have an age-standardised demand figure for 140 care home places making a total of 195 beds. The demand for places in nursing homes is approximately 94.

There are no care homes in the City of London and just two non-specialised homes in the two Westminster wards totalling 80 beds of which half are in nursing homes. The demand for nursing beds is therefore more than double the supply. This excess demand could supplement the demand from Lambeth and Southwark

There are further homes in Westminster and Islington that might compete with Coin Street's home, but these would also have to meet the demand from these wards and boroughs.

6.1.5 Demand from relations

People who work in the City or the centre of London could find it very convenient to have a relation in a care home where CSCB is planning its facility. Access by taxi, bus or tube is good and it is particularly convenient for those commuting via Waterloo or London Bridge.

6.2 Changes in demand and supply

6.2.1 Summary

London has seen its number of beds fall faster than the national pattern and has fewer per older person than England.

Few if any care home operators can afford to develop care homes that rely on local authority funding; they are either all private pay or rely on a cross-subsidy from private payers.

A sustainable occupancy rate is considered to be around 90-92 per cent, which means that the need for beds is eight to ten per cent higher than ASD indicates.

6.2.2 Factors affecting supply and demand

In Section 4.3 we quoted two paragraphs from CQC's *State of Care 2019*:

"Looking at capacity, the number of residential and nursing home beds has been falling steadily in all regions over the last five years, which reflects a national and local ambition to support people to remain at home for as long as possible. London has a much lower number of beds per 100,000 people aged 85 and over compared with the North East, but both have seen their bed numbers decrease by 11% over the period – the highest decrease of all regions.

Around Coin Street several other factors apply:

- there has been a steady reduction in the number of hospital beds in England, the King's Fund reporting that the number has more than halved over the past 30 years, from around 299,000 in 1987/88 to 141,000 in 2018/9, while the number of patients treated has increased significantly. This has been achieved, inter-alia, by shorter stays and the use of nursing beds for step-down

Review of Nursing Home Plans for Coin Street

- care homes in the centre of London have to compete with the NHS for care staff and particularly nurses; Guy's & St Thomas's, Barts, the Royal Marsden, UCH and Chelsea & Westminster are among these, and there are also the private hospitals around Harley Street too. Across the country many nursing homes have changed to care only because of the difficulty recruiting nurses
- property in central London is expensive and it is difficult to operate a home economically at local authority fee rates; central London local authorities prefer to place people further from the centre if they can to save money.

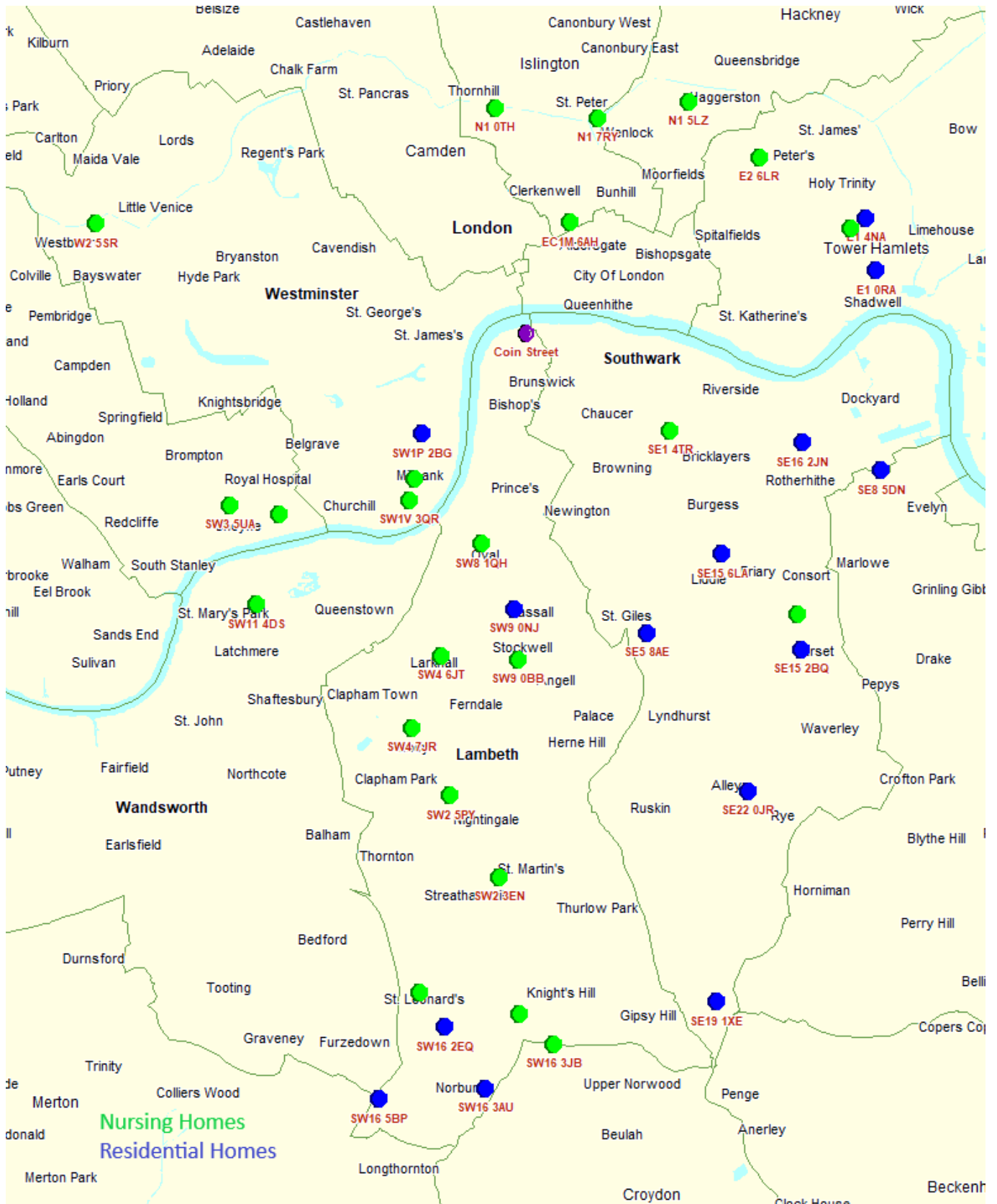
In the unlikely event that demand locally did drop below supply survival of the fittest would apply, and Coin Street's newer and better care home would place it among the fittest.

6.2.3 Occupancy rates

A sustainable care home market cannot run at 100 per cent occupancy; the void periods when a resident dies or goes permanently into hospital, which happens more frequently now that lengths of stay are shorter, make full occupancy impossible. There also needs to be some spare capacity to deal with winter pressures and other fluctuations in demand.

A sustainable occupancy rate is considered to be around 90-92 per cent, which means that the need for beds is eight to ten per cent higher than ASD indicates.

Map 1 Nursing and residential homes in Lambeth, Southwark and within a three-mile radius of Coin Street.



Appendix 1 Tables

Table a Projected population in Bishops ward 2020-35

	18-64	65-74	75-84	85+
2020	10,251	715	311	133
2021	10,280	742	312	137
2022	10,302	761	322	141
2023	10,326	787	330	145
2024	10,365	815	336	148
2025	10,391	852	344	154
2026	10,430	891	353	155
2027	10,489	931	364	156
2028	10,539	973	377	159
2029	10,585	1,017	386	161
2030	10,654	1,056	400	164
2031	10,715	1,086	413	166
2032	10,755	1,116	424	177
2033	10,792	1,138	439	182
2034	10,825	1,152	455	188
2035	10,847	1,159	476	194

Source: derived by Kingsbury Hill Fox from ONS 2018-based subnational population projections

Table b Projected population in Borough & Bankside ward 2020-35

	18-64	65-74	75-84	85+
2020	8,874	472	191	100
2021	8,918	492	194	104
2022	8,954	511	202	106
2023	8,995	537	208	107
2024	9,032	564	215	110
2025	9,067	593	221	113
2026	9,119	625	228	115
2027	9,165	656	236	117
2028	9,200	687	244	120
2029	9,254	716	252	123
2030	9,324	742	260	126
2031	9,390	764	269	130
2032	9,420	785	278	136
2033	9,439	798	291	142
2034	9,463	812	304	147
2035	9,484	818	320	152

Source: derived by Kingsbury Hill Fox from ONS 2018-based subnational population projections

Table c Projected population in St George's ward 2020-35

	18-64	65-74	75-84	85+
2020	5,215	299	149	59
2021	5,246	312	152	61
2022	5,266	324	159	62
2023	5,292	339	164	63
2024	5,314	355	169	65
2025	5,335	373	175	66
2026	5,364	393	179	67
2027	5,391	411	185	68
2028	5,415	432	190	70
2029	5,447	450	196	72
2030	5,484	466	203	74
2031	5,519	481	211	77
2032	5,541	495	219	81
2033	5,556	504	230	84
2034	5,572	512	240	87
2035	5,585	518	253	90

Source: derived by Kingsbury Hill Fox from ONS 2018-based subnational population projections

Table d Projected population in Lambeth borough 2020-35

	18-64	65-74	75-84	85+
2020	238,407	15,849	8,725	3,743
2021	239,045	16,494	8,755	3,877
2022	239,552	16,902	9,084	3,987
2023	239,862	17,463	9,307	4,100
2024	240,114	18,077	9,526	4,178
2025	239,909	18,866	9,716	4,325
2026	239,712	19,729	9,924	4,394
2027	239,553	20,643	10,190	4,428
2028	239,349	21,534	10,519	4,507
2029	239,188	22,548	10,840	4,572
2030	239,453	23,403	11,232	4,655
2031	239,824	24,082	11,667	4,742
2032	240,276	24,708	11,969	4,982
2033	240,979	25,192	12,369	5,164
2034	241,861	25,528	12,812	5,321
2035	242,762	25,674	13,382	5,496

Source: derived by Kingsbury Hill Fox from ONS 2018-based subnational population projections

Table e Projected population in Southwark borough 2020-35

	18-64	65-74	75-84	85+
2020	229,764	15,995	8,548	3,471
2021	231,113	16,653	8,728	3,594
2022	232,123	17,288	9,129	3,647
2023	233,034	18,150	9,445	3,718
2024	233,629	19,000	9,727	3,806
2025	234,150	19,999	10,012	3,904
2026	234,586	21,096	10,273	3,973
2027	235,003	22,087	10,561	4,041
2028	235,303	23,190	10,900	4,133
2029	235,888	24,175	11,273	4,227
2030	236,665	25,041	11,668	4,361
2031	237,436	25,807	12,132	4,501
2032	237,944	26,526	12,586	4,732
2033	238,603	27,014	13,197	4,919
2034	239,322	27,431	13,805	5,096
2035	240,032	27,693	14,524	5,272

Source: derived by Kingsbury Hill Fox from ONS 2018-based subnational population projections

Table f Projected population in City of London 2020-35

	18-64	65-74	75-84	85+
2020	5,399	936	495	189
2021	5,362	965	502	176
2022	5,349	958	533	173
2023	5,327	962	568	176
2024	5,302	972	587	179
2025	5,282	975	619	180
2026	5,258	1,005	632	181
2027	5,252	1,031	646	182
2028	5,236	1,059	657	187
2029	5,238	1,101	668	186
2030	5,252	1,112	687	194
2031	5,236	1,150	705	193
2032	5,242	1,180	702	209
2033	5,230	1,218	709	225
2034	5,223	1,241	718	233
2035	5,218	1,266	724	245

Source: derived by Kingsbury Hill Fox from ONS 2018-based subnational population projections

Table g Projected population in St James's and Vincent wards 2020-35

	18-64	65-74	75-84	85+
2020	17,818	2,086	1,064	523
2021	18,001	2,158	1,101	546
2022	18,183	2,197	1,152	572
2023	18,314	2,254	1,195	596
2024	18,422	2,319	1,230	621
2025	18,493	2,394	1,274	640
2026	18,559	2,473	1,309	658
2027	18,636	2,545	1,360	673
2028	18,710	2,629	1,397	695
2029	18,782	2,716	1,437	720
2030	18,845	2,809	1,472	751
2031	18,891	2,889	1,514	780
2032	18,930	2,982	1,542	820
2033	18,961	3,067	1,578	856
2034	19,009	3,140	1,620	891
2035	19,044	3,202	1,670	923

Source: derived by Kingsbury Hill Fox from ONS 2018-based subnational population projections

Table h Rate of older population growth by area 2020-35

	3 wards	Lambeth	Southwark	2 boroughs
2020	0%	0%	0%	0%
2021	3%	3%	3%	3%
2022	7%	6%	7%	7%
2023	10%	9%	12%	10%
2024	14%	12%	16%	14%
2025	19%	16%	21%	19%
2026	24%	20%	26%	23%
2027	29%	25%	31%	28%
2028	34%	29%	36%	33%
2029	39%	34%	42%	38%
2030	44%	39%	47%	43%
2031	48%	43%	51%	47%
2032	53%	47%	57%	52%
2033	57%	51%	61%	56%
2034	60%	54%	65%	60%
2035	64%	57%	70%	63%

Source: derived by Kingsbury Hill Fox from ONS 2018-based subnational population projections

Table i Rate of older population growth in 3 wards by age band 2020-35

	18-64	65-74	75-84	85+
2020	0%	0%	0%	0%
2021	0%	4%	1%	3%
2022	1%	7%	5%	6%
2023	1%	12%	8%	8%
2024	2%	17%	11%	11%
2025	2%	22%	14%	14%
2026	2%	28%	17%	15%
2027	3%	34%	21%	17%
2028	3%	41%	25%	20%
2029	4%	47%	28%	22%
2030	5%	52%	33%	25%
2031	5%	57%	37%	28%
2032	6%	61%	41%	35%
2033	6%	64%	47%	40%
2034	6%	67%	53%	45%
2035	6%	68%	61%	49%

The three wards are Bishop's, Borough & Bankside and St George's
 Source: derived by Kingsbury Hill Fox from ONS 2018-based subnational population projections

Table j ASD for care home places within the three wards 2020-35

	Bishop's	B & B	St George's	Three wards
2020	40	28	18	86
2021	41	29	19	89
2022	42	30	19	91
2023	43	30	20	93
2024	44	31	20	95
2025	45	32	21	98
2026	46	33	21	100
2027	47	34	22	103
2028	48	35	22	105
2029	49	36	23	108
2030	50	37	24	111
2031	51	38	24	113
2032	54	39	26	119
2033	55	41	27	123
2034	57	42	27	126
2035	58	44	28	130

B & B is Borough & Bankside
 Source: derived by Kingsbury Hill Fox from its own ASD formula and ONS 2018-based subnational population projections

Table k ASD by age band for care home places within the three wards 2020-35

	Young disabled	Older people	Adults in 3 wards
2020	7	79	86
2021	7	81	89
2022	7	84	91
2023	7	86	93
2024	7	88	95
2025	7	91	98
2026	7	93	100
2027	8	95	103
2028	8	98	105
2029	8	100	108
2030	8	103	111
2031	8	106	113
2032	8	111	119
2033	8	115	123
2034	8	118	126
2035	8	123	130

Rows may not sum due to rounding

Source: derived by Kingsbury Hill Fox from its own ASD formula and ONS 2018-based subnational population projections

Table l ASD for care home places within the two boroughs 2020-35

	Lambeth	Southwark	Two boroughs
2020	1,080	1,029	2,109
2021	1,106	1,060	2,166
2022	1,138	1,087	2,225
2023	1,168	1,115	2,283
2024	1,192	1,145	2,337
2025	1,227	1,177	2,404
2026	1,251	1,205	2,456
2027	1,272	1,232	2,504
2028	1,302	1,266	2,568
2029	1,330	1,301	2,631
2030	1,363	1,343	2,706
2031	1,397	1,387	2,784
2032	1,450	1,444	2,894
2033	1,497	1,500	2,997
2034	1,540	1,553	3,093
2035	1,590	1,609	3,199

Rows may not sum due to rounding

Source: derived by Kingsbury Hill Fox from its own ASD formula and ONS 2018-based subnational population projections

Table m ASD for care home places for older people within the two boroughs 2020-35

	Lambeth	Southwark	Two boroughs
2020	1,008	960	1,969
2021	1,035	990	2,025
2022	1,067	1,017	2,084
2023	1,096	1,046	2,142
2024	1,120	1,075	2,195
2025	1,155	1,107	2,262
2026	1,179	1,134	2,314
2027	1,200	1,162	2,362
2028	1,230	1,196	2,426
2029	1,258	1,230	2,489
2030	1,291	1,272	2,563
2031	1,325	1,315	2,641
2032	1,378	1,373	2,751
2033	1,424	1,428	2,852
2034	1,467	1,481	2,948
2035	1,517	1,537	3,053

Rows may not sum due to rounding

Source: derived by Kingsbury Hill Fox from its own ASD formula and ONS 2018-based subnational population projections

Table n ASD for care home places for YDA within the two boroughs 2020-35

	Lambeth	Southwark	Two boroughs
2020	72	69	140
2021	72	69	141
2022	72	70	142
2023	72	70	142
2024	72	70	142
2025	72	70	142
2026	72	70	142
2027	72	71	142
2028	72	71	142
2029	72	71	143
2030	72	71	143
2031	72	71	143
2032	72	71	143
2033	72	72	144
2034	73	72	144
2035	73	72	145

Rows may not sum due to rounding

Source: derived by Kingsbury Hill Fox from its own ASD formula and ONS 2018-based subnational population projections

Table o ASD for care home places by age band within the two boroughs 2020-35

	Young disabled	Older people	All adults
2020	140	1,969	2,109
2021	141	2,025	2,166
2022	142	2,084	2,225
2023	142	2,142	2,284
2024	142	2,195	2,337
2025	142	2,262	2,405
2026	142	2,314	2,456
2027	142	2,362	2,504
2028	142	2,426	2,568
2029	143	2,489	2,631
2030	143	2,563	2,706
2031	143	2,641	2,784
2032	143	2,751	2,894
2033	144	2,852	2,996
2034	144	2,948	3,093
2035	145	3,053	3,198

Rows may not sum due to rounding

Source: derived by Kingsbury Hill Fox from its own ASD formula and ONS 2018-based subnational population projections

Table p Growth in ASD for care home places by age band within three wards 2020-35

	Young disabled	Older people	All adults
2020	0%	0%	0%
2021	0%	3%	3%
2022	1%	6%	5%
2023	1%	8%	8%
2024	2%	11%	10%
2025	2%	15%	14%
2026	2%	17%	16%
2027	3%	20%	19%
2028	3%	23%	22%
2029	4%	27%	25%
2030	5%	30%	28%
2031	5%	34%	32%
2032	6%	40%	37%
2033	6%	45%	42%
2034	6%	50%	46%
2035	6%	55%	51%

Rows may not sum due to rounding

Source: derived by Kingsbury Hill Fox from its own ASD formula and ONS 2018-based subnational population projections

Table q Growth in ASD for care home places by age band within the two boroughs 2020-35

	Young disabled	Older people	All adults
2020	0%	0%	0%
2021	0%	3%	3%
2022	1%	6%	6%
2023	1%	9%	8%
2024	1%	12%	11%
2025	1%	15%	14%
2026	1%	18%	16%
2027	1%	20%	19%
2028	1%	23%	22%
2029	1%	26%	25%
2030	2%	30%	28%
2031	2%	34%	32%
2032	2%	40%	37%
2033	2%	45%	42%
2034	3%	50%	47%
2035	3%	55%	52%

Rows may not sum due to rounding

Source: derived by Kingsbury Hill Fox from its own ASD formula and ONS 2018-based subnational population projections

Table r ASD for care home places in the City of London by age band 2020-35

	Young disabled	Older people	All adults
2020	2	54	55
2021	2	52	54
2022	2	53	54
2023	2	55	56
2024	2	56	57
2025	2	57	59
2026	2	58	60
2027	2	59	60
2028	2	60	62
2029	2	61	62
2030	2	63	64
2031	2	64	65
2032	2	66	68
2033	2	69	71
2034	2	71	72
2035	2	73	75

Rows may not sum due to rounding

Source: derived by Kingsbury Hill Fox from ONS 2018-based subnational population projections

Table s Growth in ASD for care home places by age band in the City by age 2020-35

	Young disabled	Older people	All adults
2020	0%	0%	0%
2021	-1%	-3%	-3%
2022	-1%	-2%	-2%
2023	-1%	1%	1%
2024	-2%	4%	4%
2025	-2%	6%	6%
2026	-3%	8%	8%
2027	-3%	9%	9%
2028	-3%	12%	11%
2029	-3%	13%	13%
2030	-3%	17%	16%
2031	-3%	18%	18%
2032	-3%	23%	22%
2033	-3%	29%	28%
2034	-3%	32%	31%
2035	-3%	36%	35%

Rows may not sum due to rounding

Source: derived by Kingsbury Hill Fox from its own ASD formula and ONS 2018-based subnational population projections

Table t ASD for care home places in St James's and Vincent wards by age 2020-35

	Young disabled	Older people	All adults
2020	5	134	140
2021	5	140	145
2022	5	146	151
2023	5	152	157
2024	6	157	163
2025	6	162	168
2026	6	167	173
2027	6	172	177
2028	6	177	183
2029	6	183	189
2030	6	190	195
2031	6	196	202
2032	6	204	210
2033	6	212	217
2034	6	219	225
2035	6	226	232

Rows may not sum due to rounding

Source: derived by Kingsbury Hill Fox from ONS 2018-based subnational population projections

Table u Growth in ASD for care home places by age band in St James's and Vincent wards 2020-35

	Young disabled	Older people	All adults
2020	0%	0%	0%
2021	1%	4%	4%
2022	2%	9%	8%
2023	3%	13%	13%
2024	3%	17%	17%
2025	4%	21%	20%
2026	4%	24%	24%
2027	5%	28%	27%
2028	5%	32%	31%
2029	5%	36%	35%
2030	6%	41%	40%
2031	6%	46%	45%
2032	6%	52%	50%
2033	6%	58%	56%
2034	7%	63%	61%
2035	7%	69%	66%

Source: derived by Kingsbury Hill Fox from its own ASD formula and ONS 2018-based subnational population projections

Table v ASD for care home places in the City and St James's and Vincent wards 2020-35

	City	St James's & Vincent	All adults
2020	55	140	195
2021	54	145	199
2022	54	151	206
2023	56	157	213
2024	57	163	220
2025	59	168	227
2026	60	173	232
2027	60	177	238
2028	62	183	244
2029	62	189	251
2030	64	195	260
2031	65	202	267
2032	68	210	278
2033	71	217	288
2034	72	225	297
2035	75	232	307

Source: derived by Kingsbury Hill Fox from ONS 2018-based subnational population projections

Table w Growth in ASD for care home places in the City and St James's and Vincent wards 2020-35

	City	St James's & Vincent	All adults
2020	0%	0%	0%
2021	-3%	4%	2%
2022	-2%	8%	6%
2023	1%	13%	9%
2024	4%	17%	13%
2025	6%	20%	16%
2026	8%	24%	19%
2027	9%	27%	22%
2028	11%	31%	25%
2029	13%	35%	29%
2030	16%	40%	33%
2031	18%	45%	37%
2032	22%	50%	42%
2033	28%	56%	48%
2034	31%	61%	52%
2035	35%	66%	57%

Source: derived by Kingsbury Hill Fox from ONS 2018-based subnational population projections

Table x Care homes within the primary catchment areas not specialising in LD, MH or complex needs

Name	Postcode	Borough	Sector	Class	Beds	Main	Age	Owner	Ward	Distance
Norton House	SW1P 2BG	Westminster	V	c/o	40	OP	65+	Anchor Hanover Group	St James	1.2
Garside House Nursing Home	SW1P 4AH	Westminster	V	NH	40	OP D	65+	Sanctuary Care	Vincent	1.5
Tower Bridge Care Centre	SE1 4TR	Southwark	P	NH	128	D	65+	HC-One	London Bridge & W Bermondsey	1.5
St Peters Residence	SW8 1QH	Lambeth	V	NH	56	OP	65+	Little Sisters of the Poor	Oval	1.7
Ashley Cooper House	SW9 0NJ	Lambeth	V	c/o	16	PD	65+ <65	Sanctuary Care Limited	Vassall	2.3
Bluegrove House	SE16 2JN	Southwark	V	c/o	48	OP D	65+	Anchor Hanover Group	N. Bermondsey	2.5
Waterside	SE15 6LA	Southwark	V	c/o	48	OP D	65+	Anchor Hanover Group	Peckham	2.5
Havelock Court Care Home	SW9 0BB	Lambeth	P	NH	60	OP, D	65+	Bupa Care Homes (ANS)	Ferndale	2.6
Love Walk	SE5 8AE	Southwark	V	c/o	31	PD	65+ <65	Mission Care	St Giles	2.7
The Laurels Care Centre	SW4 6JT	Lambeth	P	NH	68	OP	65+	The Laurels Care Centre	Larkhall	2.7
Queens Oak Care Home	SE15 2QL	Southwark	P	NH	89	OP D	65+	Lancewood	Nunhead & Queens Rd	3.2
Rose Court	SE8 5DN	Southwark	V	c/o	64	D	65+	Anchor Hanover Group	Rotherhithe	3.2
Collingwood Court Care Home	SW4 7JR	Lambeth	P	NH	80	OP	65+	Bupa Care Homes (ANS)	Clapham Town	3.3
Greenhive House	SE15 2BQ	Southwark	V	c/o	64	OP D	65+	Anchor Hanover Group	Nunhead & Queens Rd	3.5
Windmill Lodge Care Home	SW2 5PY	Lambeth	P	NH	93	OP	65+	Windmill Healthcare	Brixton Hill	3.8
The Elms	SE22 0JR	Southwark	V	c/o	26	OP D	65+	S E London Baptist Homes	Dulwich Hill	4.2
Limetree Care Home	SW2 3EN	Lambeth	P	NH	92	D	65+	Limetree Healthcare	Streatham Hill	4.5
St Mary's Care Home	SW16 1QY	Lambeth	P	NH	86	OP	65+	St. Mary's Care	St Leonard's	5.5
Uplands Care Home	SW16 2QH	Lambeth	P	NH	65	OP	65+	Alliance Care (Dales Homes)	Knights Hill	5.6
Athol House - Care Home	SE19 1XE	Southwark	V	c/o	21	PD	65+ <65	Leonard Cheshire Disability	Dulwich Wood	5.8
British Home & Hospital for Incurables	SW16 3JB	Lambeth	V	NH	127	PD	65+ <65	Trustees of British Home & Hospital for Incurables	Knight's Hill	5.8
Joybrook	SW16 3AU	Lambeth	P	c/o	15	OP	65+	Joy Care Home Services	Streatham South	6.2

Review of Nursing Home Plans for Coin Street

Name	Postcode	Borough	Sector	Class	Beds	Main	Age	Owner	Ward	Distance
Aashna House Residential Care Home	SW16 5BP	Lambeth	V	c/o	38	OP	65+	Sanctuary Care	Furzedown	6.4

Sector: V = Voluntary, P = Private

PSR = primary support reason: 65+ = age 65 and over, <65 = under age 65, MH = MH needs, PD = PD, D = dementia, SI = sensory impairment, SM = substance misuse

Class: NH = nursing home, c/o = care only home (residential home)

Main = PSR of main client group: OP = older people, PD = Physical Disabilities, D = dementia

Distance = distance from SE1 9LT

The word Limited has been removed from the owner's name for brevity

Source: derived by Kingsbury Hill Fox from CQC data

Table y Relevant care homes outside the catchment areas

Name	Postcode	Borough	Sector	Class	Beds	Main	Age	Owner	Ward	Distance
Queen Elizabeth II Infirmary	EC1M 6AH	Islington	V	NH	11	OP	65+	Governors of Sutton's Hospital in Charterhouse	Bun Hill	1.0
St Georges Nursing Home	SW1V 3QR	Westminster	P	NH	44	OP, D	65+	Mrs Elizabeth McManus	Tachbrook	1.7
Bridgeside Lodge Care Centre	N1 7RY	Islington	P	NH	64	OP, D YDA	65+ <65	Blackberry Hill	St Peter's	1.8
Muriel Street Resource Centre	N1 0TH	Islington	P	NH	63	OP, D	65+	Care UK Community Partnerships	Barnsbury	1.9
Mary Seacole Nursing Home	N1 5LZ	Hackney	NHS	NH	50	OP	65+	Homerton University Hospital NHS Foundation Trust	Hoxton East & Shoreditch	2.3
Silk Court Care Home	E2 6LR	Tower Hamlets	V	NH	51	OP	65+	Anchor Hanover Group	St Peter's	2.4
The Margaret Thatcher Infirmary	SW3 4SR	Kensington & Chelsea	V	NH	68	OP	65+	Royal Hospital Chelsea	Royal Hospital	2.5
Chelsea Court Place	SW3 5UA	Kensington & Chelsea	P	NH	15	D	65+ <65	IAC Chelsea	Royal Hospital	2.8
Hawthorn Green Residential and Nursing Home	E1 3DB	Tower Hamlets	P	NH	90	OP	65+	Hamberley Care 1	Stepney Green	2.9
Albert Suites at Battersea Place	SW11 4DS	Wandsworth	P	NH	27	OP	65+	Battersea Place Retirement Village	St Mary's Park	3.0
Westport Care Home	E1 0RA	Tower Hamlets	P	c/o	44	OP	65+	Ferrolake	Stepney Green	3.0

Review of Nursing Home Plans for Coin Street

Beaumont Court Care Home	E1 4NA	Tower Hamlets	P	c/o	42	OP	65+	Beaumont Court Care Home	St Dunstan's	3.0
Forrester Court	W2 5SR	Westminster	P	NH	113	OP	65+	Care UK Community Partnerships	St George's	3.6

Abbreviations as for Table x

Source: derived by Kingsbury Hill Fox from CQC data

Table z Specialised care homes within the catchment areas

Name	Postcode	Sector	Class	Beds	Main	Age	Ward	Distance
Gaywood Street	SE1 6HG	V	c/o	5	LD	<65	St George's	0.9
Orient St Adult Respite Unit	SE11 4SR	LA	c/o	4	LD	<65	St George's	1.0
71-73 Dunton Road	SE1 5TW	V	c/o	7	MH	65+ / <65	South Bermondsey	1.9
Garden House - Care Home	SE15 5UW	V	c/o	10	LD	<65	Peckham	2.9
Fenwick	SE15 4HS	P	c/o	3	LD	<65	Rye Lane	3.6
94 Strathleven Road	SW2 5LF	V	c/o	6	LD	<65	Brixton Hill	3.6
Glengarry Road	SE22 8QD	V	c/o	6	MH	<65	Goose Green	3.8
Mundania	SE22 0NG	P	c/o	6	LD	<65	Peckham Rye	4.4
Kirkstall Lodge	SW2 4HF	P	c/o	6	LD	<65	Streatham Hill	4.5
High View Residential Unit	SE21 8HY	P	c/o	7	MH	<65	Thurlow Park	4.7
Dover Lodge	SE23 3DS	V	c/o	7	LD	<65	Forest Hill	4.9
St Andrews	SW16 1AG	P	c/o	8	MH	65+ / <65	St Leonards	4.9
Mountearl	SW16 2NR	P	c/o	8	LD	<65	Streatham Wells	5.0
London Gothic Lodge	SE27 9HG	V	c/o	6	LD	<65	Thurlow Park	5.0
Leigham Lodge	SW16 2PL	P	c/o	6	LD	<65	Streatham Wells	5.1
Magnolia Court	SW16 2PL	P	c/o	2	LD	<65	Streatham Wells	5.1
31 Woodbourne Ave	SW16 1UP	V	c/o	8	LD	<65	St Leonards	5.2
Pinfold Home	SW16 2SL	P	c/o	26	MH	<65	Streatham Wells	5.3
11 Angles Rd	SW16 2UU	P	c/o	6	MH	<65	Streatham Wells	5.3
25 Garrads Road	SW16 1JS	P	c/o	14	LD	<65	St Leonards	5.4
Fairlie House	SE27 0RW	P	NH	53	MH	65+	Streatham Wells	5.4
11 Tooting Bec Gardens	SW16 1QY	V	c/o	8	LD	<65	St Leonard's	5.5
Ambleside Avenue	SW16 1QE	V	c/o	6	LD	<65	St Leonards	5.5
Ambleside Lodge - London	SW16 1QE	P	c/o	8	LD	<65	St Leonards	5.5
Deepdene House	SW16 2EA	P	c/o	20	MH	<65	St Leonards	5.6
49 Oakdale Road	SW16 2HL	P	c/o	9	LD	<65	Streatham Wells	5.6
La Rosa 2	SW16 2DZ	P	c/o	6	MH	<65	St Leonards	5.6
La Rosa Residential Care Home	SW16 6AN	P	c/o	7	MH	<65	St Leonards	5.7
Rosemanor-Hopton	SW16 2EQ	P	c/o	17	MH	65+ / <65	Streatham Wells	5.7
Minehead	SW16 2AW	P	c/o	6	LD	<65	Streatham Wells	5.8
Sophia Maria House	SW16 6AY	P	c/o, R	7	MH	<65	St Leonards	5.8
Streatham Crisis and Support House	SW16 6HZ	P	NH	6	MH	<65	St Leonards	5.9
Parkview	SW16 3BU	P	c/o	17	MH	65+ / <65	Streatham South	6.0

Review of Nursing Home Plans for Coin Street

Name	Postcode	Sector	Class	Beds	Main	Age	Ward	Distance
Streatham Common South	SW16 3BU	P	c/o	7	MH	65+ / <65	Streatham South	6.0
Vosse Court	SW16 3BS	P	c/o	6	LD	<65	Streatham South	6.1
Thanet House	SW16 5PG	P	c/o	6	MH	65+ / <65	St Leonards	6.1
5 Bowley Close	SE19 1SZ	V	c/o	4	LD	<65	Dulwich Wood	6.1
6 Bowley Close	SE19 1SZ	V	c/o	4	LD	<65	Dulwich Wood	6.1
Rosenmanor 1	SW16 5LQ	P	c/o	8	MH	<65	Streatham South	6.2

Drewstead Lodge at SW16 1AD is registered with CQC but has permanently closed

South London and Maudsley NHS Foundation Trust operates the Maudsley Hospital in Southwark and the Greenvale Specialist Care Unit in Lambeth

Abbreviations as for Table x plus ED = eating disorders, MHA = caring for people whose rights are restricted under the MH Act, R = Rehabilitation (illness/injury), ABI = acquired brain injury, LA = local authority

Source: derived by Kingsbury Hill Fox from CQC data

Appendix 2 Planning Search

Southwark validated and decided applications 6/7/20 – 3/9/20

Borough & Bankside Ward

Application validated 12/8/20

81 Picton Street London Southwark SE5 7QH

<https://planning.southwark.gov.uk/online-applications/applicationDetails.do?keyVal=QEYEZKKBHHZ00&activeTab=summary>

20/AP/2276 | Details of Condition 10 'Secured by Design' as required by planning permission LBS reg no 19/AP/5860 - variation to Condition 1 (Approved Plans) pursuant to planning permission 18/AP/3350 'Redevelopment of the site to include the demolition of the existing building and erection of a part four, part five storey new care home to provide 92 bed spaces with associated landscaping and access works'. To amend approved drawings: - Addition of an extended corner, bringing the building to a feature point at Picton Street/Edmund Street - Increase of the basement floorspace from approx. 200.3sqm to 289.4sqm (an increase of 89.1sqm), allowing for back of house facilities to be accommodated; - Increase of the overall GIA of the building from 4,339sqm to 4,593sqm (an increase of 254sqm), and resulting in minor variations to the building mass; -Improving the legibility of the entrance and further breaking down the mass; - Increase the approved building height by 440mm as a result of minor changes to the finishes levels; - Review of the internal configuration, to ensure that the development achieves the maximum common/communal space for future residents. Improvements to the efficiency of the building layout, allows for the development to accommodate an addition 10 bed spaces (increasing the overall total number of rooms from 92 to 102); - Improving the emergency access and allowing for 1 additional parking space; and - Review of the external communal amenity space, decreasing its overall size by 100sqm (resulting in a provision of 1,344sqm), to enhance its usability for future residents. | 81 Picton Street London Southwark SE5 7QH

Original Application: <https://planning.southwark.gov.uk/online-applications/applicationDetails.do?keyVal=ZZZV0MKBWR254&activeTab=summary>

South Bermondsey Ward

Application validated 12/8/20

94-116 Southwark Park Road London Southwark SE16 3RR

<https://planning.southwark.gov.uk/online-applications/applicationDetails.do?keyVal=QF2DUMKB03Q00&activeTab=summary>

Review of Nursing Home Plans for Coin Street

20/AP/2323 | Details to discharge Schedule 5, Paragraph 1.1 (Skills and Employment Methodology) of the Section 106 agreement relating to planning permission 15/AP/3508 (Demolition of the existing building and redevelopment to provide 57 extra care dwellings in a part 2/part 5 storey building; hard and soft landscaping; cycle and parking facilities; plant areas and other ancillary work.)

Original application: <https://planning.southwark.gov.uk/online-applications/applicationDetails.do?keyVal=ZZZV14KBWR936&activeTab=summary>

Application decided week beginning 27/7/20

[Peckham and Nunhead ward](#)

Tayo Situ House 73 Commercial Way London Southwark SE15 6FA

<https://planning.southwark.gov.uk/online-applications/applicationDetails.do?keyVal=QCQZ2TKBGKU00&activeTab=summary>

20/AP/1779 | Non material amendments to planning permission ref. 19/AP/2196 dated 4th June 2020 for 'Construction of a four storey building to provide 50 extra care residential units linked to the existing facilities in Tayo Situ House and a dementia day care centre and community hub at ground floor. Relocation of the existing electrical substation and provision of the associated car parking, vehicle accesses, cycle parking and landscaping works'. The proposed amendments comprise alterations to facades, brick and windows, addition of fire rated screens to Type A balconies, redesign of Type C unit to be M4(3) adaptable.

Original application: <https://planning.southwark.gov.uk/online-applications/applicationDetails.do?keyVal=ZZZV0KKBWR277&activeTab=summary>

[Lambeth validated and decided applications 6/7/20 – 3/9/20](#)

Nothing found

[Westminster validated and decided from 10/8/20 -3/9/20](#)

Nothing found

[City of London – validated and decided 1/7/20 – 3/9/20](#)

Nothing found

[Camden – validated from 3/8/20 – 31/8/20](#)

Review of Nursing Home Plans for Coin Street

Nothing found

Kensington and Chelsea – validated from 3/7/20 – 3/9/20

Application validated Week ending 10/7/20

Stanley Ward

Former, 2 Dovehouse Street, London

<https://www.rbkc.gov.uk/planning/searches/details.aspx?batch=20&id=CON/20/03684&type=&tab=>

Details required by condition 31 (Electric Car Charging points) of planning permission 18/04268 (Variation of Condition 2 (compliance with approved drawings) of planning permission PP/17/00583 (Demolition of all existing buildings and erection of a part 5, part 6 storey building plus 2 storey basement to provide Extra Care Accommodation (Class C2 Use) comprising 55 units, communal and wellbeing facilities, back of house and service areas, car and cycle parking, landscaping and plant. (MAJOR DEVELOPMENT) for changes to the proposal, mainly comprising the relocation of the chiller plant to roof level, reconfiguration of the servicing arrangements, minor design changes to the facade, addition of balconies to the rear, internal changes including additional staff offices, nurses stations and amendments to the unit mix, and changes to the trigger point for the submission of the Public Art Strategy.)

Original application: <https://www.rbkc.gov.uk/planning/searches/default.aspx#tabs>

Queens Gate ward

Application Validated week ending 10/7/20

2 Kensington Square, London, W8 5EP

<https://www.rbkc.gov.uk/planning/searches/details.aspx?batch=20&id=CON/20/03700&type=&tab=>

Details required by Condition 5 (Refuse and recycling) of planning permission PP/19/03985 (change of use from offices (Use Class B1) to care home (Use Class C2) specialising in dementia; and alteration and extension, landscaping, plant and other associated work). There are to be 40 beds

original application: <https://www.rbkc.gov.uk/planning/searches/details.aspx?adv=0&simple=PP%2f19%2f03985&simpleBatch=20&simSubmit=Search&id=PP/19/03985&cn=249528+Gerald+Eve+LLP+72+Welbeck+Street+London+&type=decision&tab=tabs-planning-2>

Review of Nursing Home Plans for Coin Street

Tower Hamlets

Nothing found

Islington applications received and registered 30/6/20 – 3/9/20

Nothing found

Wandsworth

Approved – 4/8/20

Queenstown ward (from Latchmere, Queenstown and Shaftsbury wards applications and decisions 1/7/20 – 29/8/20)

York Court Care Home 313 Battersea Park Road SW11 4LU

<https://planning1.wandsworth.gov.uk/Northgate/PlanningExplorer/Generic/StdDetails.aspx?PT=Planning%20Applications%20On-Line&TYPE=PL/PlanningPK.xml&PARAM0=1004446&XSLT=/Northgate/PlanningExplorer/SiteFiles/Skins/Wandsworth/xslt/PL/PLDetails.xslt&FT=Planning%20Application%20Details&PUBLIC=Y&XMLSIDE=/Northgate/PlanningExplorer/SiteFiles/Skins/Wandsworth/Menus/PL.xml&DAURI=PLANNING>

Details of landscaping, screening to terrace, external ventilation equipment, cycle storage and roof structures pursuant to conditions 5, 7, 8, 14 and 16 of planning permission dated 26/06/2019 ref 2018/4571 (Variation of conditions 12 and 13 pursuant to planning permission dated 18/08/2017 ref 2016/5617 (Alterations and extensions to existing (Class C2) care home, including the creation of two additional storeys at third and fourth floor, single-storey side extension and partial infill of existing courtyard to provide a 108 bed care home (78 care beds and 30 new assisted living suites) so as to allow a change of BREEAM rating from "Excellent" to "Very Good".)

Appendix 3 Extract from our brief

Brief for consultant assessment of demand for proposed nursing facilities at Gabriel's Wharf.

This brief is to accompany Coin Street Community Builders' request for proposals to report on

- a) current and future need/demand for CSCB's proposed provision of facilities on Gabriel's Wharf, South Bank, London; and
- b) existing and planned provision of relevant facilities by others within an appropriate catchment area around the site.

1. Background

Coin Street Community Builders (CSCB) is a neighbourhood-based social enterprise established by local residents in 1984. Since then CSCB has transformed a largely derelict 13-acre site into a thriving mixed-use neighbourhood by creating new co-operative homes; shops, galleries, restaurants, cafes and bars; a park and riverside walkway; and sports and community facilities - including a neighbourhood centre. It organises festivals, markets and events; provides childcare, family support, youth and community programmes, 1:1 advice, and training and employment opportunities. Income is generated from a variety of sources including leasing property, venue hire, fees for services, and managing businesses – including conferences, a gallery, and joint ventures. CSCB is currently planning implementation of phase 2 of its 'Doon Street' development. Phase 1 was Rambert's new headquarters and dance studios (opened in 2013) and phase 2 incorporates a public swimming and indoor leisure centre as well as 236 flats for sale and rent.

2. Redevelopment of Prince's Wharf and Gabriel's Wharf

Since 2012 CSCB has been considering redevelopment of its Prince's Wharf and Gabriel's Wharf sites. Initial proposals, in the context of a joint redevelopment with ITV, envisaged a care home or extra care housing funded by an adjacent office development. In 2016 CSCB stopped this workstream when it became clear that the joint development would not proceed and Prince's Wharf would not be available until 2029. By this time CSCB had worked with Stanton Williams and JLL Healthcare to develop a nursing home proposal that had been discussed with Guy's and St Thomas' NHS Foundation Trust, Lambeth Council, Southwark Council, and a range of other organisations.

The nursing home was to be part of a mixed development which included:

- on Gabriel's Wharf: ground and first level public uses, a public piazza leading from Upper Ground to the riverside, a 76-room nursing home, community facilities, and mixed residential accommodation above;
- on Prince's Wharf: an enabling workspace development; and
- shared basement and servicing facilities.

Features of the proposed nursing home were:

- 76 rooms in 12 'clusters' spread over 4 floors - each with activity rooms and staff facilities;
- 3 'clusters' per floor, each with its own communal space;
- an ability for each 'cluster' or floor to serve a specific need (e.g. based on age or medical condition);
- provision of onsite kitchens and community spaces to serve those living in or near to the development including a programme of activities and intergenerational work;

Review of Nursing Home Plans for Coin Street

- designed to serve a variety of needs from neighbouring local authority referrals, NHS commissions, and self-funders;
- the nursing home to be an integral part of a wider social enterprise offer including a range of leisure, housing, and commercial provision in the immediate neighbourhood.

3. The commission

CSCB now expects to secure the 'enabling' Prince's Wharf site in 2025 and so wishes to revisit the need for nursing home facilities with a view to restarting design and business planning in 2021. In particular CSCB wishes to understand changing demographics, the likely incidence of relevant medical conditions, and existing and planned provision of facilities serving similar needs within the surrounding catchment area. CSCB meets regularly with businesses, arts organisations, community and public bodies based in or otherwise concerned with north Lambeth and north Southwark. These include Guys & St Thomas's NHS Hospital Trust, King's College London, and Lambeth and Southwark Councils. We wish to collaborate with organisations that share our aspiration to create an inspirational neighbourhood.

Prince's Wharf and Gabriel's Wharf fall within the London Borough of Lambeth and the Council is currently preparing its Local Plan and Site Allocations DPD. CSCB wishes to feed into this process the findings of the study now being commissioned.