

# IMPROVING THE MIX OF SERVICES PROVIDED FOR OLDER PEOPLE WITH MENTAL HEALTH PROBLEMS: THE BALANCE OF CARE APPROACH TO HEALTH AND SOCIAL CARE PLANNING

PSSRU

*Outline of a research project being conducted by the Personal Social Services Research Unit (PSSRU) at the University of Manchester. This work forms part of a major body of research funded by the National Institute for Health Research entitled National Trends and Local Delivery in Old Age Mental Health Services.*

March 2010

*David Challis, Michele Abendstern, Christian Brand, Val Harrington, Sue Tucker, Mark Wilberforce, Bob Baldwin, Graham Dunn, Dave Jolley, Martin Knapp and Sean Lennon*

---

**BACKGROUND** The rising number of older people and the present worrying state of public finances make the effective use of health and social care resources an ever-increasing imperative. Against this background one major concern in recent decades has been the desire to provide the optimal mix of institutional and community-based services for older people, including older people with mental health problems. To date little is known about relative cost-effectiveness of different services, however, whilst marked variations exist in the amount of resources invested in hospital, residential and community-based services nationwide.

The balance of care approach provides a framework that can assist health and social care decision makers choose between alternative service configurations by identifying service users whose care needs can be met in more than one setting and comparing the costs and benefits of different options. Despite the attractiveness of this approach, however, a systematic literature review completed as an earlier part of this programme identified only two studies in which the balance of care framework had been used to plan services for older people with mental health problems and highlighted a number of ways in which the approach could be strengthened.

---

**PURPOSE OF THE STUDY** The proposed research seeks to build on earlier balance of care studies and has three main aims:

- to apply the balance of care framework to the care of older people with mental health problems in three areas of North-West England;
- to develop and refine the balance of care methodology; and
- to enable other health and social care decision-makers to employ the balance of care framework within their own areas independently.

---

**DESIGN** In contrast to some other balance of care studies, the study will take a bottom-up approach grounded in the experience of practitioners, users and carers. The work will be conducted over a twelve-month period and will have six main stages:

1. A comparison of information about the services currently available in each research site with published national data.

*continued/...*

---

- 
2. The collection of information about the sociodemographic, functional and service receipt characteristics of older people with mental health problems cared for in five core settings: acute mental health inpatient wards; care homes; very sheltered housing; at home with specialist mental health support; and at home with generic social services support.
  3. The identification of those people for whom an alternative care setting would be appropriate. Working with case vignettes developed from the above data, local practitioners, older people and an expert reference group will explore the possibility of providing alternative care packages for a range of people currently cared for in each service setting.
  4. The collection of primary data about the outcomes of a sub-sample of people admitted to a care home and a matched sample of individuals in receipt of specialist mental health support in their own homes.
  5. An exploration of the relative costs and benefits of the alternative care options for different service users in accordance with local practice for the allocation of resources.
  6. An examination of the implications of the above decisions with key local stakeholders including specialist mental health staff, social services staff, general practitioners, older people, carers and their representatives.
- 

## OUTCOMES

This research programme seeks to inform, influence and improve decision-making at both local and national levels. The dissemination strategy will thus be multifaceted, with planned outputs including the provision of local feedback, presentations at national conferences, the production of accessible reports and the publication of peer-reviewed articles. One important strand of the project will also develop a balance of care manual that can be used for local evaluation and service review by health and social care organisations nationwide.

---

## RESEARCH PARTNERS

The research is led by a partnership that brings together substantial expertise in the research and practice of care for older people with mental health problems, including: PSSRU, University of Manchester (lead research team); Manchester Mental Health and Social Care Trust; Manchester Mental Health Joint Commissioning Team; PSSRU, London School of Economics; Health Methodology Group, University of Manchester; Manchester Mental Health Joint Commissioning Team; and patient and community group representatives.

For further information please contact Sue Tucker: tel: 0161 2755938, e-mail: [sue.tucker@manchester.ac.uk](mailto:sue.tucker@manchester.ac.uk)

---

*The Personal Social Services Research Unit undertakes social and health care research, focusing particularly on policy research and analysis of equity and efficiency in community care and long term care and related areas, including services for elderly people, people with mental health problems and children in care. The Unit's work is funded mainly by the Department of Health.*

*The PSSRU Bulletin and publication lists are available free of charge from the PSSRU librarian in Canterbury (01227 827773) and at [www.PSSRU.ac.uk](http://www.PSSRU.ac.uk). The PSSRU was established at the University of Kent at Canterbury in 1974 and from 1996 has operated from three sites:*

---

**The University of Manchester**  
PSSRU  
Dover Street Building  
The University of Manchester, Oxford Road,  
Manchester M13 9PL  
Tel: 0161 275 5250 Fax: 0161 275 5790  
Email: [pssru@manchester.ac.uk](mailto:pssru@manchester.ac.uk)  
Site Director: Professor David Challis

**The University of Kent at Canterbury**  
PSSRU  
Cornwallis Building, University of Kent at  
Canterbury,  
Canterbury, Kent CT2 7NF  
Tel: 01227 823963 Fax: 01227 827038  
Email: [pssru@kent.ac.uk](mailto:pssru@kent.ac.uk)  
Site Director: Professor Ann Netten

**The London School of Economics**  
PSSRU  
London School of Economics,  
Houghton Street, London WC2 2AE  
Tel: 020 7955 6238 Fax: 020 7955 6131  
Email: [PSSRU@lse.ac.uk](mailto:PSSRU@lse.ac.uk)  
Site Director: Professor Martin Knapp

---