



**AGENDA ITEM**

6.1.2

**POPULATION HEALTH & PARTNERSHIPS COMMITTEE**

**Market Stability Report (MSR) June 2022**

<b>Date of meeting</b>	26/07/2022
<b>FOI Status</b>	Open/Public
<b>If closed please indicate reason</b>	Choose an item.
<b>Prepared by</b>	Sarah Mills, Head of Regional Commissioning Unit
<b>Presented by</b>	Linda Prosser, Executive Director of Strategy and Transformation
<b>Approving Executive Sponsor</b>	Executive Director of Strategy and Transformation
<b>Report purpose</b>	FOR NOTING

**Engagement (internal/external) undertaken to date (including receipt/consideration at Committee/group)**

<b>Committee/Group/Individuals</b>	<b>Date</b>	<b>Outcome</b>
(Insert Name)	(DD/MM/YYYY)	Choose an item.

**ACRONYMS**

MSR	Market Stability Report
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**1. SITUATION/BACKGROUND**

- 1.1 Section 144B of the Social Services and Well-being (Wales) Act 2014 requires local authorities to prepare and publish market stability reports and makes provision for regulations setting out the form these must take, matters to be included, and the prescribed period for carrying out market stability assessments as set out in the Partnership Arrangements (Amendment) and Regulated Services (Market Stability Reports) (Wales) Regulations 2021.



- 1.2 The Regulations also amend the Partnership Arrangements (Wales) Regulations 2015 so that the preparation and publication of market stability reports must be carried out on a regional footprint, with local authorities and Local Health Boards working together through Regional Partnership Boards (RPBs).
- 1.3 The report will help inform and shape the next five-year area plan, along with the 2022 Cwm Taf Morgannwg (CTM) population needs assessment.

## **2. SPECIFIC MATTERS FOR CONSIDERATION BY THIS MEETING (ASSESSMENT)**

- 2.1 The information contained within this section summarises the key messages from the market stability report.
- 2.2 The recommendations will be further explored within the adult and children's boards within future work programmes.
- 2.3 **Care Homes (Adults and Older People)**

### ***Key Messages***

- All three local authorities are below the national average for care homes with nursing, which suggests a squeeze on supply and availability across the region.
- Difficulties highlighted in being able to find suitable placements in a timely manner and to match supply to changes in demand.
- At least half of all providers (49%) have occupancy of less than 85%, which is the level defined by Care Forum Wales as being "non-sustainable".
- Current provision unable to meet the increasing need for respite care, particularly dementia care.
- Respite care for individuals with learning disabilities with older parents has also been identified as a particular problem.
- Where regional provision is unable to meet the needs of an individual, specialist complex provision may be identified out of county.
- There is no longer the capacity to deal with all patients discharged from hospital who may benefit from community support due to extreme pressure on community care.
- Resulting in people staying in hospital longer than necessary or become permanent in residential care.
- Fall in demand for general residential care as people are entering residential care with more complex needs and at a



more advanced stage in their mental and/or physical health condition.

- At the provider level, finance is critical to the viability of individual (independent) care homes, their ability to invest in maintaining and improving homes and reconfiguring to meet the changing demand.
- A significant area of concern is the availability of Adult with Nursing Placements for those individuals who require specialist Elderly Mentally Infirm (EMI) nursing.
- Staff recruitment and retention of nurses and care workers is a challenge for many homes, particularly local authority-owned homes, reducing the regions capacity.

### ***Recommendations***

- Development of a consistent dataset covering the three local authorities.
- Develop and implement a consistent regional approach to measure the quality of the care homes.
- Enhance partnership working with providers.
- Action should be taken to remedy the under-utilisation of capacity in local-authority-owned homes.
- Increase the following types of provision:
- Short-term/respite beds and/or respite unit(s).
- Step-down care, facilitating recovery and assessment of needs outside the hospital environment.
- Nursing and EMI nursing beds.

## **2.4 Adult Placements Shared Lives**

### ***Key Messages***

- Each council have separate arrangements in place for the management of long-term and short-term placements, with local authorities reporting that provision is not sufficient to meet current and projected demand.
- The matching process between families and individuals needing support is complex and often lengthy, resulting in lengthy delays.
- The services delivered are adequate though increasing demand and a lack of choice negatively impacts the overall quality.
- These services have delivered annual savings and demonstrated positive outcomes for service users.
- The pandemic has resulted in issues for developing the service further, impacting on service capacity, low interest in new families to the scheme and client group scope.



- There is a lack of capacity for family placements, issues with matching individuals to families and long processing and waiting times.

### **Recommendations**

- Local Shared Lives Schemes have provided excellent outcomes previously and provide a worthwhile service for young people across Cwm Taf Morgannwg.
- Additional investment should be considered, if necessary, to overcome any delays caused by the pandemic.
- Transition to adulthood.

## **2.5 Advocacy services (children)**

### **Key messages**

- Concerns about the availability and consistency of advocacy for children led to the introduction of a national approach to statutory advocacy services in 2017.
- Tros Gynnal Plant (TGP), providing service across the three local authority areas.
- The quality of advocacy services provided to children and young people is of sufficient quality.
- The move to online and digital communications was embraced by both provider and many clients in receipt of service.
- Issue-Based Advocacy continues to be provided and has a high level of demand.
- Reported increases in demand for Advocacy for parent carers involved in child protection cases, and advocacy work undertaken within Parc Prison secure estate.

### **Recommendations**

- Increase the capacity of advocacy across the Cwm Taf Morgannwg region with a greater emphasis on co-producing and improving the opportunities for the voices of users to be heard.

## **2.6 Advocacy services (adults)**

### **Key messages**

- There is a growing demand for advocacy support services for adults and older people.
- Statutory (Regulated) Advocacy sits alongside, and complementary to, non-statutory advocacy services. All commissioned providers deliver both statutory and non-statutory advocacy.



- There is suitable support available for eligible clients, the quality varies across the region from good to adequate, with the quality of the service adversely impacted by delays in response time.
- The restrictions introduced nationally due to the Coronavirus has had an impact in the number of people accessing the service.
- Organisations providing advocacy rely on a small group of trained advocates making the services fragile. Without increased capacity and client group scope this will remain an area of concern.

### **Recommendations**

- There is room for further development on the Active Offer-work is underway in this area on a regional and local level too increase the number of active offers.
- A gap has been identified for advocacy for parents, which is non-statutory.

## **2.7 Care homes (children and young people)**

### **Key messages**

- All local authorities across the Cwm Taf Morgannwg region have seen an increase over the past 4 years in residential care, but over the past 2 years Rhondda Cynon Taff (RCT) has started to see a decline.
- There has been a slight increase in vacancies across the sector, though vacancies remain very limited and lower within Cwm Taf Morgannwg than other regions across Wales.
- Consensus that the placements market is not providing sufficient appropriate places to fully meet children's needs at the point of need.
- To identify appropriate accommodation children and young people are often placed out of county or even country.
- Growing pressure on residential spend with increase in external providers and out of county placements.
- Gaps in provision identified include insufficient therapy services, inability to support sibling groups etc. that could have a detrimental impact on the well-being of the child.
- Placement decision making appears to be heavily impacted by available supply as opposed to needs driven.
- The Welsh Government have published 'Removing Profit from the care of looked after children' Programme Board policy statement and affirmed commitment adding that plans to be in place to transition to not-for-profit foster and residential care in Wales'.



- Removing profit from children's residential sector may disincentivise providers to enter this market place and further exacerbate the lack of sufficient capacity within the current market.
- Require greater scope to develop more regional provision, including a focus on higher need groups, Family group, long terms, short break and emergency bed and family safeguarding, specialist fostering.
- Recruitment and retention are a challenge shared across social care and applies to both in-house and independent provision.
- A number of challenges identified in the PNA include increase support for mental health and domestic abuse impacting on support services.
- Capacity issues in fostering are placing a strain on residential services, resulting in a shortage of beds.

### **Recommendations**

- Increase the supply of registered Children's Homes for children, especially services with the ability to meet the needs of children with complex needs.
- Actions required to address the lack of integrated approach to residential care.
- Reduce the delays for safe accommodation.
- Workforce development need for skilled staff available to support young people in crisis.
- Action required to increase the supply of local authority foster carers.
- Address the insufficient supply of not for profit.
- IFA placements particularly for children whose earlier experiences mean they need more skilful care (particularly 8+ yrs).

## **2.8 Secure accommodation services**

### **Key messages**

- Hillside Secure Children's Home in Neath is the only facility currently in Wales. The unit has capacity of 22 places shared between the Youth Justice Board (linked to offending), and Welsh local authorities for welfare purposes.
- Due to the few secure units (also few in England), they are used nationally, resulting in difficulties in securing a place.
- There is a national shortage (England and Wales) of secure placement, often leading to Local Authorities having to care for young people in settings that are not secure placements,

despite them being assessed as meeting the threshold for secure provision.

- Secure accommodation is costly, difficult to provide and recruiting and retaining skilled staff willing to work in a challenging environment is difficult.
- Placements are often out of area and can be prohibitive to be able to support a rehab back to family/residential/foster placement.

### **Recommendations**

- Secure accommodation needs to be developed on a national level however new regional accommodation developments will help to meet lower-level needs.

## **2.9 Adoption services**

### **Key messages**

- CTM spans the footprint of 2 regional adoption collaborations.
- In general, children who are adopted achieve positive outcomes but the adoption process, from assessment, through matching and then placing children is often lengthy.
- There has been a slow decrease in the number of children being made subject of a placement order with an agreed plan of adoption.
- Children coming through with an agreed plan of adoption have increasingly complex needs, the main issues include exposure to significant drug and alcohol use during pregnancy, genetic conditions and disability issues as a result of non-accidental injury.
- There is insufficient adoption support for adopters who have more complex needs, exacerbated by up to 3 year waiting lists for Neuro Development (ND) assessment.
- There is a continuing need to identify and support suitable adoptive families for small children for whom it is not safe for them to grow up with a foster carer or relative
- Demand for adoption has now stabilised following a decrease in children requiring adoptive placements and emphasis placed upon preventative measures to enable children to remain at home.
- The primary concern continues to be the recruiting of adoptive families and establishing a sufficient selection ensuring choice when matching.

### **Recommendations**

- Increase the availability of psychology
- Action required to reduce the waiting list for neuro developmental services.

- Introduction of an integrated therapeutic adoption support services (MAPPS is LA only).
- Consider the development of a specialist support provision to provide bespoke support to learners in schools.
- Increase the use of TESSA for adoptive families with greater needs.
- Development of sensory OT interventions as identified as a service gap by TESSA.

## 2.10 Residential family centres

### Key messages

- There are only two registered residential family centres in the whole of Wales, one of which recently reopened after a closure. One of those centres is at Crossroads (Ty Seren) in Bridgend.
- Placements in residential family centres are less preferred, with parent and child foster placements seen as a better option as they can provide an assessment in a more 'natural setting'.
- This shift in preference is evident through the relatively low numbers placed from each of the local authorities in the region.
- Although numbers are low, placements are often out of area, making it difficult to step down back into the community, and impacting contact with family, siblings etc.
- Spot purchasing occasional places avoids committing resources to provision that may not be needed. However, it does mean that costs are likely to be high and placements likely to be distant.

### Recommendations

- Insufficient need for residential family placements makes it difficult to justify commissioning a dedicated local centre.
- Increasing regional parent and child fostering capacity, either in house or commissioned from an IFA, would provide local capacity where commissioners have more influence in cost and quality.

## 2.11 Fostering services

### Key messages

- There is increased difficulty in recruiting enough foster carers and the issue of authorities outside of the region purchasing placements has resulted in a shortage.
- There is also growing demand for more specialist foster placements, including:
  - Transitional foster carers
  - Children with autism
  - Children with learning disabilities



- Young people who exhibit multiple risk-taking behaviours including substance misuse, risk of CSE and absconding
- Parent and child placements; and
- Welsh language foster placements.
- The increase in the number of children becoming looked after has subsequently made placing children in a local provision harder.
- These increased levels of demand for foster carers, both within the region and nationally, has resulted in further difficulties when securing appropriate placements for children.
- There is considerable uncertainty in the market with the commitment to eliminate 'for profit' provision and the impact of the pandemic impacting the ability to identify foster carers across the region.
- A growing area of concern for the region are foster carers who do not have the correct skills to support children, often resulting in them being placed in emergency/ bridging placements.

### **Recommendations**

- Increasing in-house capacity to respond to the demand for foster carers will be help address many of issues identified above.
- In addition to a new recruitment campaign, review and enhance the offer to foster carers to increase the likelihood of encouraging new foster carers.
- Introduce different commissioning models to encourage/ensure IFAs have tailor their offer to local requirements.
- Investment in preventative, respite and edge of care services can help reduce the need for children to be looked after away from their families.
- Engagement with IFA providers will be vital before and during the transition to a not-for-profit model to ensure that capacity isn't lost.

## **2.12 Domiciliary support services**

### **Key messages**

- The increase in the over 65 population and in particular the 85+ population presents an expected and unprecedented increase in demand on services.
- Demand for domiciliary care is likely to grow in the long term due to the aging population and the increasing numbers of people with dementia and other complex needs.



- Recruitment and retention have become increasingly challenging due to competition from other sectors and the pandemic and associated risks.
- This underlines the need to develop support and services that promote and maximise independence, ensuring the provision of acute and longer-term support is targeted to those in most need, including specialist support for children with disabilities and their families.
- The number of double handed calls has increased, reducing capacity and the requirement to upskill staff and provide more complex equipment.
- The number of urgent orders for complex equipment has increased significantly and continues to rise.
- The overall stability of the domiciliary care market in the region appears fragile and risks sufficiency in meeting demand and expectations based on current projections.
- There are opportunities to build on Community resilience models developed to support COVID response to create resourceful communities under a place-based approach.

### **Recommendations**

- Commissioners and providers need to work together across the region to develop innovative sustainable services to meet needs.
- Investigate alternative, new models for recruiting and retaining a skilled workforce.
- In line with The Healthier Wales Action Plan (2019), continue to prioritise 'the shift from hospitals to communities and communities to homes', and emphasise the important role played by right-sizing community services to facilitate timely discharge.
- Processes and procedures for setting fee across the region should be reviewed to consider greater consistency and address issues relating to costs (e.g. national commitment to the Real Living Wage).

## **3. KEY RISKS/MATTERS FOR ESCALATION TO BOARD/COMMITTEE**

- 3.1 This Market Stability Report is a crucial part within the relationship between local Statutory Partners and the care and support sector. The aim of the report is to understand the current market for health and care services and to identify future demand in the context of changing expectations and different models of service delivery.
- 3.2 The Market stability report therefore provides a strong platform for regional market shaping to meet current and future needs and



supports the development of regional plans and commissioning strategies and statements.

#### 4. IMPACT ASSESSMENT

<b>Quality/Safety/Patient Experience implications</b>	There are no specific quality and safety implications related to the activity outlined in this report.
<b>Related Health and Care standard(s)</b>	Choose an item. If more than one Healthcare Standard applies please list below:
<b>Equality Impact Assessment (EIA) completed - Please note EIAs are required for <u>all</u> new, changed or withdrawn policies and services.</b>	Choose an item.  If yes, please provide a hyperlink to the location of the completed EIA or who it would be available from in the box below.  If no, please provide reasons why an EIA was not considered to be required in the box below.
<b>Legal implications / impact</b>	There are no specific legal implications related to the activity outlined in this report.
<b>Resource (Capital/Revenue £/Workforce) implications / Impact</b>	There is no direct impact on resources as a result of the activity outlined in this report.
<b>Link to Strategic Goals</b>	Sustaining Our Future

#### 5. RECOMMENDATION

5.1 The Committee is asked to:

- **NOTE** the key messages and recommendations.
- **NOTE** the Regional Market Stability report