

BRIDGEND COUNTY BOROUGH COUNCIL

REPORT TO COUNCIL

20 JULY 2022

REPORT OF THE CORPORATE DIRECTOR – SOCIAL SERVICES & WELLBEING

MARKET STABILITY REPORT

1. Purpose of report

- 1.1 The purpose of the report is to provide Council with a brief overview of the Market Stability Report (MSR) as required under Section 144B of the Social Services and Well-being (Wales) Act 2014.

2. Connection to corporate well-being objectives/other corporate priorities

- 2.1 This report assists in the achievement of the following corporate well-being objectives under the **Well-being of Future Generations (Wales) Act 2015**:
- **Supporting a successful sustainable economy** – taking steps to make the county borough a great place to do business, for people to live, work, study and visit, and to ensure that our schools are focussed on raising the skills, qualifications and ambitions for all people in the county borough.
 - **Helping people and communities to be more healthy and resilient** - taking steps to reduce or prevent people from becoming vulnerable or dependent on the Council and its services. Supporting individuals and communities to build resilience, and enable them to develop solutions to have active, healthy and independent lives.
 - **Smarter use of resources** – ensure that all resources (financial, physical, ecological, human and technological) are used as effectively and efficiently as possible and support the creation of resources throughout the community that can help to deliver the Council's well-being objectives.

3. Background

- 3.1 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.
- 3.2 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).

- 3.3 The Regulations require local authorities to produce market stability reports every five years, with the first reports aimed to be published by 1 June 2022. The Local Government Elections on the 5th May 2022 meant that it was not possible to gain approval of the MSR until new Councils were formed.
- 3.4 The report will help inform and shape the next five-year area plan, along with the 2022 Cwm Taf Morgannwg (CTM) population needs assessment.

4. Current situation/proposal

- 4.1 In preparation for undertaking this report, local authorities carried out, in partnership with the Local Health Board and other RPB partners, an assessment of both:
- Sufficiency - an assessment of the sufficiency of care and support in meeting the needs and demand for social care as set out in the population needs assessment. and
 - Stability - an assessment of the stability of the market for regulated services providing care and support
- 4.2 The COVID19 pandemic has been an unprecedented challenge and has changed the type of demand and the way in which we deliver health and care. The impact on people who need care, and their carers is recognised as is the ongoing workforce pressures and market uncertainty.
- 4.3 In January 2021 the Welsh Government published a White Paper setting out their ambition to rebalance care and support providing a mixed economy ensuring there was not an over or under reliance on the private sector. The ambition sought to simplify current commissioning arrangements, strengthen quality and social value and actively manage the market through effective Partnership arrangements.
- 4.4 It should be further noted that the Programme for Government outlines the Welsh Governments commitment to 'eliminate private profit from care of looked after children' (Next Senedd term 2026-2031).
- 4.5 The diagram below illustrates the relationships between each of the different elements of the MSR how they will contribute towards the ongoing development of regional plans and commissioning strategies and statements.



* Statutory requirement under the 2014 Act.

Key Findings

4.6 The information contained within this section uses the key messages from the market stability report, and the recommendations will be further explored within the adult and children's boards within future work programmes.

4.7 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".
NB: These regional figures were provided at the point of drafting the MSR, where it is now reported in BCBC that current vacancy levels (7%) have returned close to those levels recorded pre-pandemic (5%).
- 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/care and support at home.
- Thus 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 EMI (Elderly Mentally Infirm) 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.

4.8 Adult Placements Shared Lives

Key Messages

- Each council has 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.

- Local Shared Lives Schemes have provided excellent outcomes previously and provide a worthwhile service for young people across Cwm Taf Morgannwg

Recommendations

- Additional investment should be considered, if necessary, to overcome any delays caused by the pandemic.
- Review transition to adulthood arrangements, including 'When I'm Ready'.

4.9 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) are 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.

4.10 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 is 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 have 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 to increase the number of active offers.
- A gap has been identified for advocacy for parents, which is non-statutory.

4.11 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 (although relatively stable in BCBC), but over the past 2 years 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, out of county placements, and even unregulated placements, on rare occasions.
- 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 Population Needs Assessment (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. From a BCBC perspective, this will include appraising options for a specialist service
- Address the insufficient supply of not for profit.
- IFA (Independent Fostering Agency) placements particularly for children whose earlier experiences mean they need more skillful care (particularly 8+ yrs).

4.12 **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.

4.13 **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 neurodevelopmental assessments.
- 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
- Consider the development of a specialist support provision to provide bespoke support to learners in schools.
- Increase the use of TESSA (Therapeutic, Education and Support Services in Adoption) for adoptive families with greater needs.
- Development of sensory OT (Occupational Therapy) interventions as identified as a service gap by TESSA.

4.14 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.

4.15 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 Child Sexual Exploitation (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 help address many of the issues identified above. From a BCBC perspective, this will include considering options in respect of a specialist support team, such as the MyST (My Support Team) team operating in the Gwent region.
- 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 tailored 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.

4.16 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 fees 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).

4.17 The full version of the MSR has been included to this report as Appendix 1, as well as a summary version of the MSR as Appendix 2.

5. Effect upon policy framework and procedure rules

5.1 None

6. Equality Act 2010 implications

6.1 In order to comply with the statutory duties contained with the Equality Act 2010 and meet our Socio-economic duty in providing services which can improve inequality of outcome for people who face socio-economic disadvantage, an Equality Impact Assessment Screening (and subsequent full assessment, if deemed necessary) will be undertaken to assess the impact of taking forward any recommendations identified within the MSR.

7. Well-being of Future Generations (Wales) Act 2015 implications

7.1 Under the Well-being of Future Generations (Wales) Act 2015, public bodies have a duty to consider the long-term impact of their decisions, and the MSR will help inform future regional commissioning strategies and priorities.

8. Financial implications

8.1 Demand from both an increasing ageing population and individuals with complex needs places significant challenges on the Council to meet this demand from within existing resources.

8.2 The report recognises that the way social care services are provided has changed over recent decades and is provided by a complex mix of independent, public, and voluntary sector provision. Whilst these are typically commissioned by statutory bodies elements can be purchased by people themselves, either using Direct Payments or their own funds if they do not qualify for state funded care.

8.3 The Market Stability Report therefore provides a strong platform for both regional and local market shaping to meet current and future needs.

8.4 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.

9. Recommendation(s)

9.1 It is recommended that Council:

- Note the key messages and recommendations; and
- Endorse the Regional Market Stability report

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Background documents:

None

Appendix 1



Market Stability
Report Summary Doc

Appendix 2



MSR summary -
V2.pdf