

Adult Social Care: An overview of the care market

Adults Health and Social
Care Overview and Scrutiny

Overview of Oldham's social care market

This presentation includes:

- Commissioning in social care
- Legislative frameworks
- Oldham's population and demographics
- Out of borough provision
- Commissioned frameworks
- Market sustainability
- Quality and Risks identified
- Gaps in the market
- Opportunities
- Priorities

Commissioning in social care

Commissioning in social care is the process where local authorities identify, arrange, purchase, and monitor social care services for people in their area at a both macro (system and sector) and micro (individual) level.

It aims to meet the care needs of people and plays a significant role in ensuring vulnerable people receive the support they need to fulfil their lives, remain independent, and delay future care needs.

As we move towards more preventative and strengths based ways of working, commissioning will need to have a greater focus on working with the sector to develop services that the local authority might not necessarily directly purchase.

Commissioning Partnerships and intentions:

In Oldham we want to work with care providers to ensure we commission services that are good quality, financial sustainable and create pathways of care for our service users.

Commissioned services will be based on a strengths-based approach in line with our vision for adult social care, and we'll continue to look for opportunities to improve and develop.

There are a number of national drivers that are shaping the current and future provision of adult social care, including:

- **White papers**
- **Care Act**
- **Continued financial pressures on local authorities to meet their statutory duties**
- **The creation of integrated care systems promoting integration and collaboration across health and social care (national agenda)**

Legislative framework



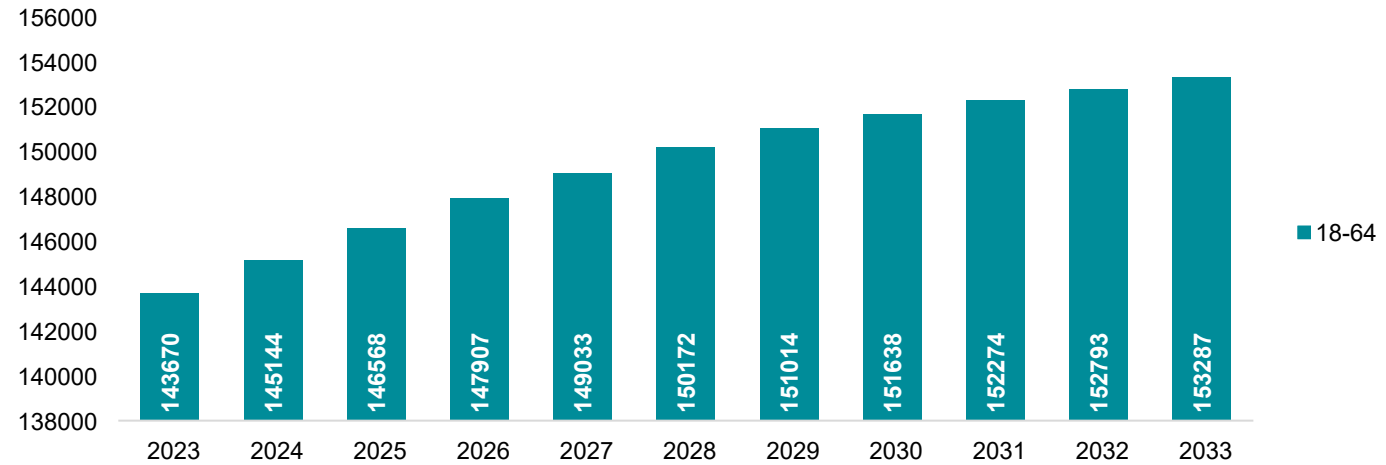
The Care Act 2014



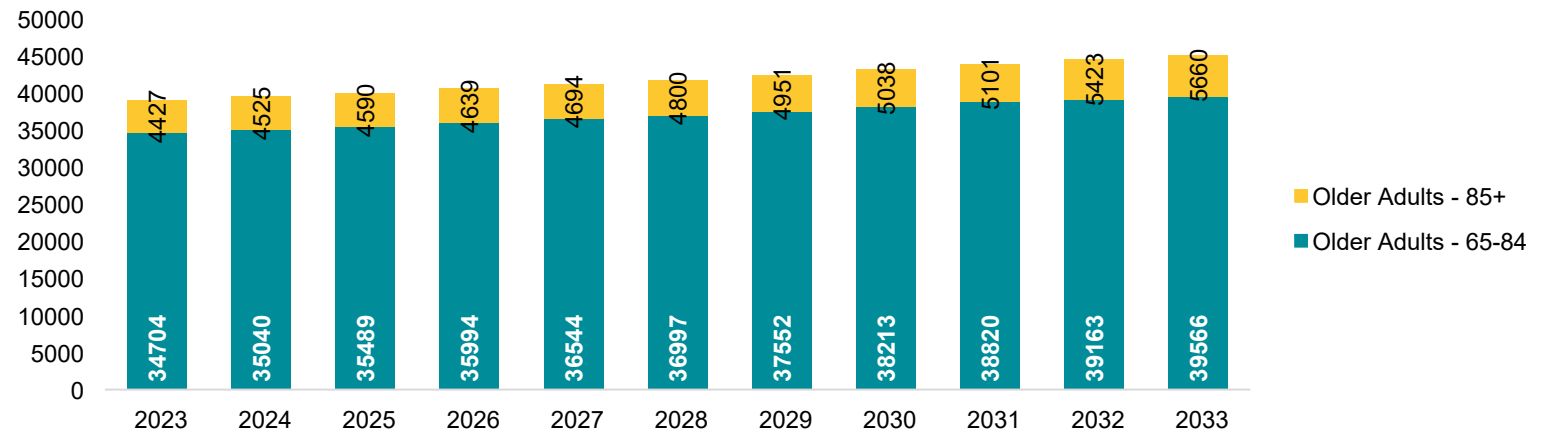
Oldham Population

- The graphs show the population projections for Oldham from 2023-33.
- The Care Home sector is predominately filled with people 65+ though there are working age residents
- Not only is the older adult population predicted to increase over the next 10 years, but the over 85s are predicted to increase over this time

Working Age Population



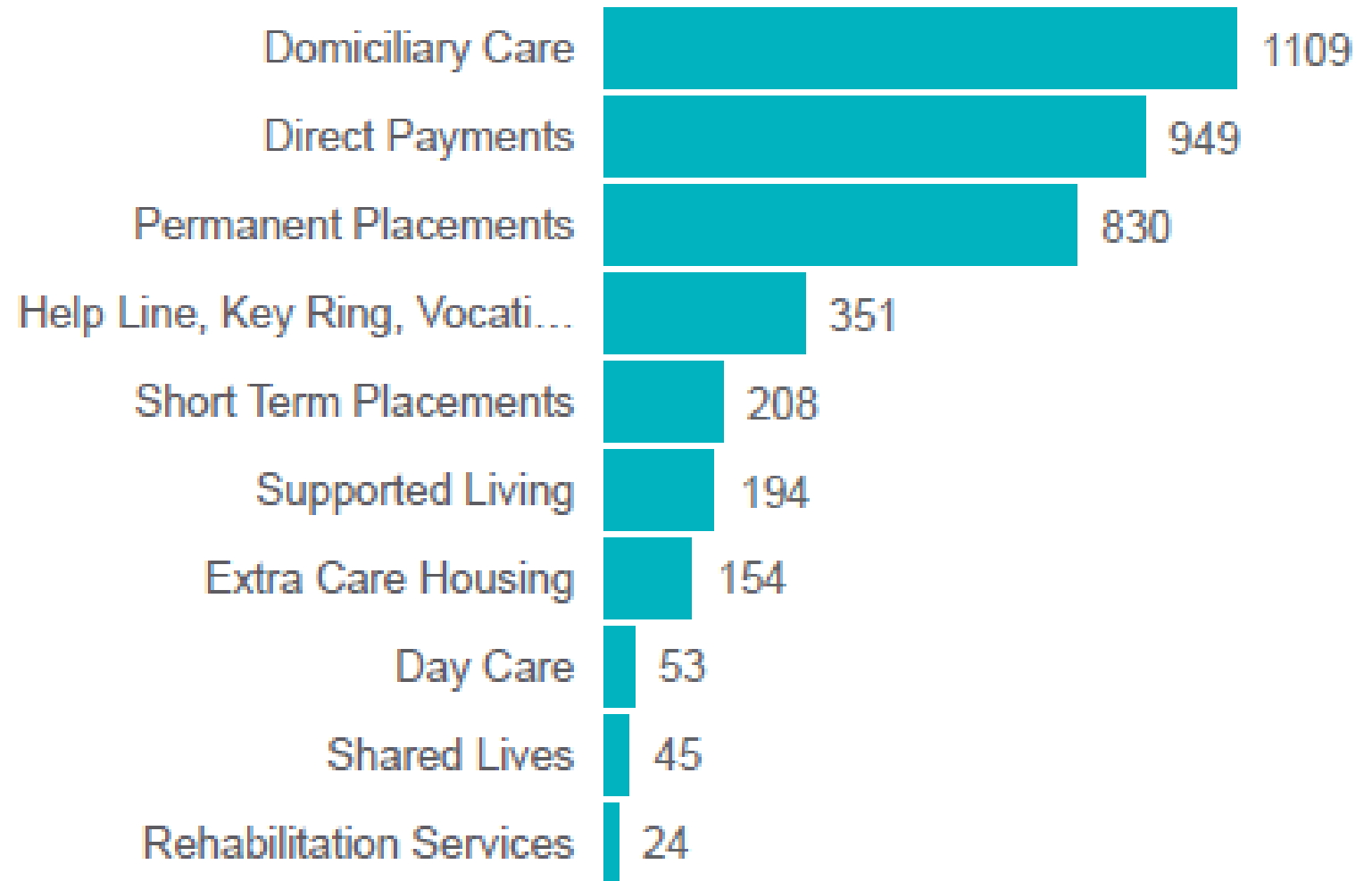
Older Adults Population



Capacity and Demand

Commissioned Packages 01/09/24

Services



Out of borough commissioned services

170

Individuals Out of Area

54

Overdue Review

No Review

£279K

Cost per Week



- Prior to an OOB placement the allocated worker requests the completion of an Out of Borough Check by the Commissioning and Market Management service. This checks the:

- CQC Rating
- host authority costs and whether the host authority has any concerns about the provision from a quality or safeguarding perspective.

This then enables decision making on the suitability of the placement.

Majority of placements are in the North West

A quarterly review takes places of Out of Borough checks to review CQC ratings and ensure all placements have had a check completed prior to placement.

Commissioned Frameworks

Nursing and Residential Homes in Oldham

- Contract start date 1st April 2023, contract initial end date 31st March 2028, with an option to extend to 31st March 2030.

Care at Home framework

- Contract start date 1st April 2019, contract initial end date 31st March 2024, extended up to 31st March 2025, with an option to extend for a further year to 31st March 2026.

Extra Care Housing

- Contract start date 1st April 2019, contract initial end date 31st March 2024, extended up to 31st March 2025, with an option to extend for a further year to 31st March 2026.

Supported Living for people with Autism and Learning Disabilities

- Due to be recommissioned

Greater Manchester Procured Frameworks

- Complex Mental Health Needs
- Learning Disability and Autism Complex Needs

Other commissioning activity due to take place:

- Approved provider lists for Day Services, and Brokers (direct payment related)

Market Sustainability and choice

Care Homes – currently fragile due to nationally reported cost pressures, Covid legacy and workforce pressures with similar issues being realised both regionally and nationally. The Strategic Provider Risk Group is a core component of how we in Oldham share information across the health and social care system and manage risks identified.

Home Care – increased consolidation in the market with large national providers buying up smaller local players, placing an increased risk in a provider failure scenario. There is also a gap for specialist Home Care services. **A mini-competition tender is due to go live in the coming weeks to address this.**

Specialist care and accommodation options – in addition to increased supported living services are required to meet Oldham's needs, especially for young people transitioning into adult services. **Access to specialist housing requires development and business cases**

Direct Payments – work underway analyse local use of Direct Payments considering potential commissioning gaps. **Risks around Direct Payments due to reduced oversight will be addressed through developing preferred provider frameworks for areas such as Day Care Services.**

Personal Assistants – Linked to Foundation Living Wage and the overall direct payment work we are considering options on market oversight, rates and **choice for residents requiring PAs and the external brokerage services**

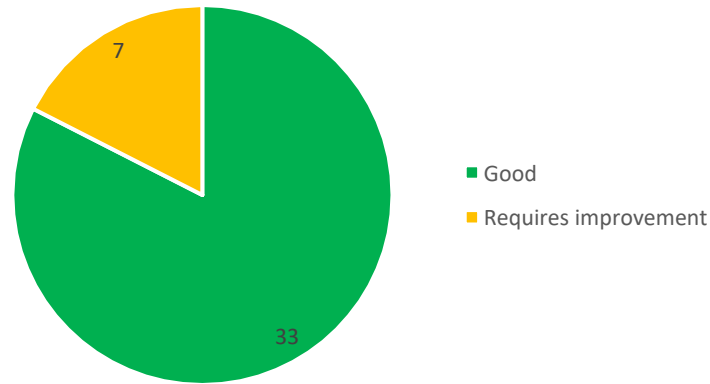
Care Market Quality and Risk

- Information included in this document was correct at the time of writing
- The Risk Ratings documented in this dashboard were agreed at the Strategic and Operational Provider Risk groups in September 2024
- CQC ratings are updated daily and therefore the CQC ratings are correct as at 24th September 2024
- The focus of this dashboard is on CQC Registered Framework Provision.

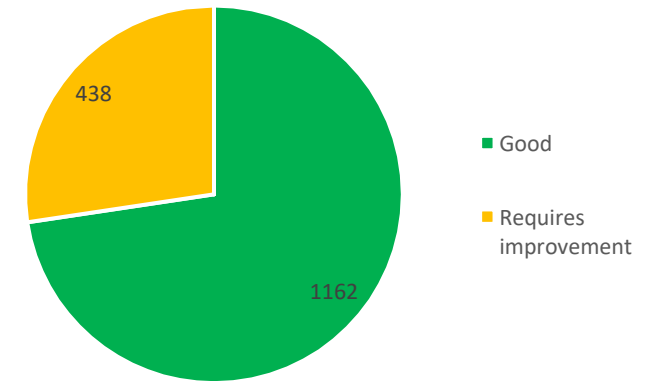
Care Quality Commission (CQC Ratings)

Where a provider receives a rating of Requires Improvement they will receive increased support and oversight from the Commissioning and Market Management Service.

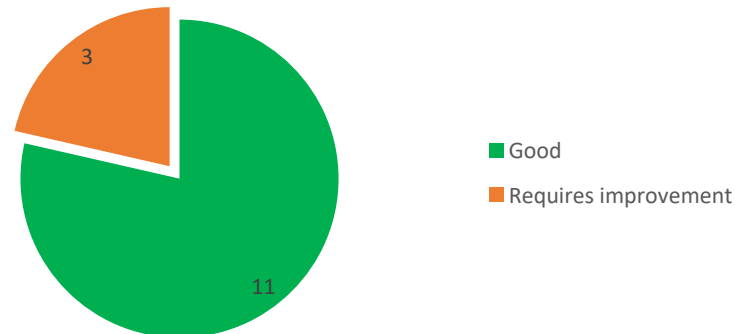
Care Homes by CQC Rating



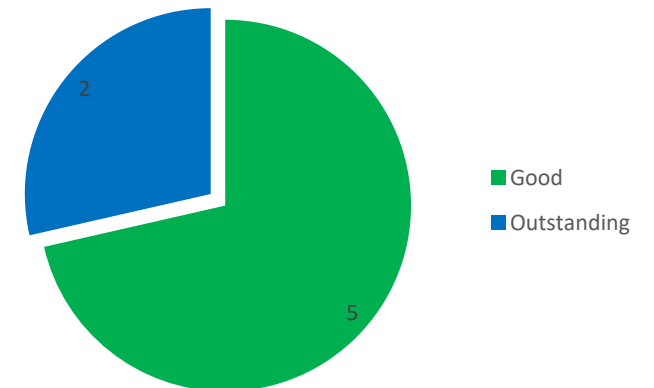
Care Home Beds by CQC Rating



Care at Home framework Providers by CQC Rating



CQC Ratings for Framework Supported Living Providers



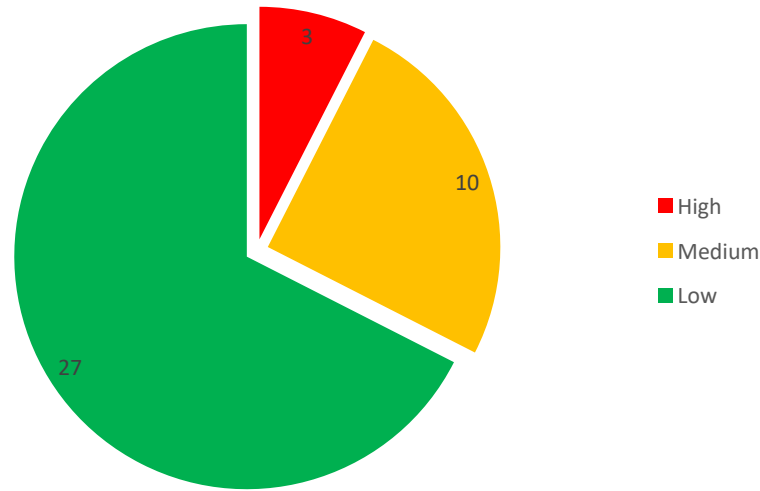
Oldham Risk Ratings

Risk ratings are agreed on a monthly basis at the Strategic Provider Risk Group and the Operation Provider Risk Group. These are multi-disciplinary groups with membership from across Adult Social Care, Community Nursing, Public Health, Healthwatch and the CQC.

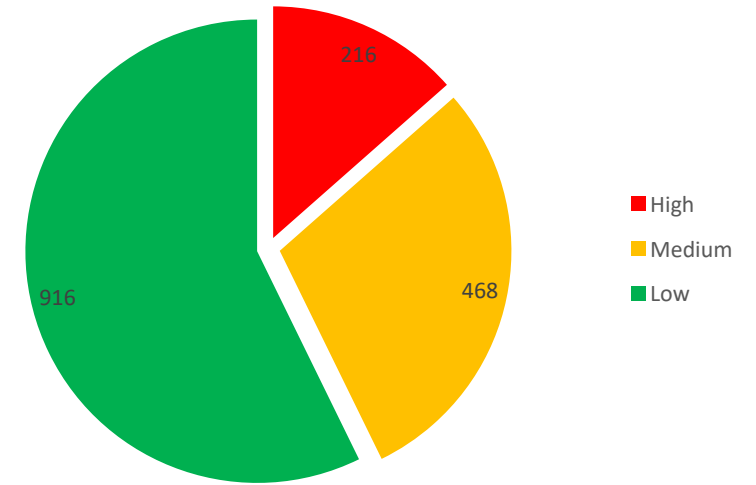
Any provider rated as Requires Improvement would automatically be rated as at least Medium risk.

Medium and High risk providers receive increased oversight and support.

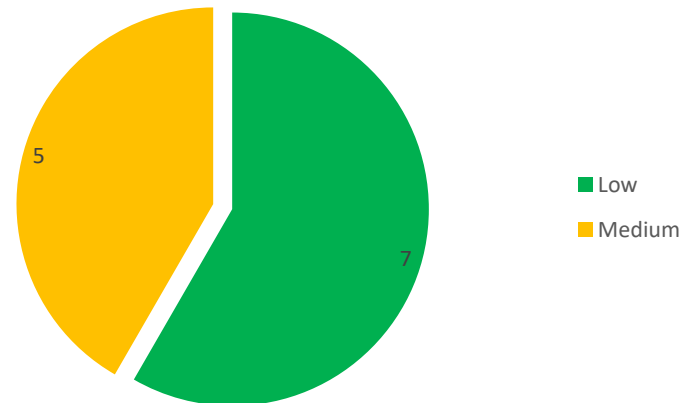
Care Homes by Risk Rating



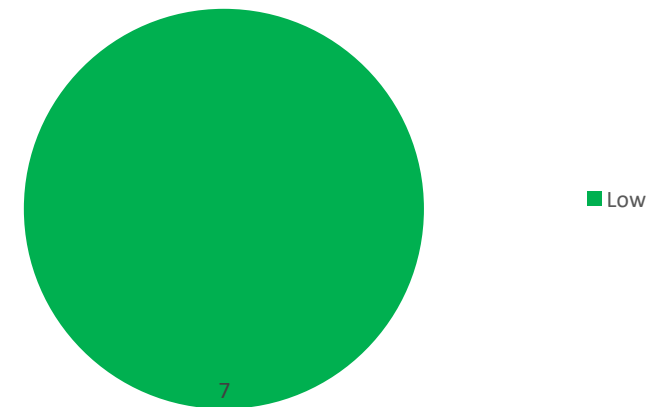
Care Home Beds by Risk Rating



Care at Home Framework and Backup Providers by Risk Rating



Supported Living Learning Disability Framework Providers by Risk Rating



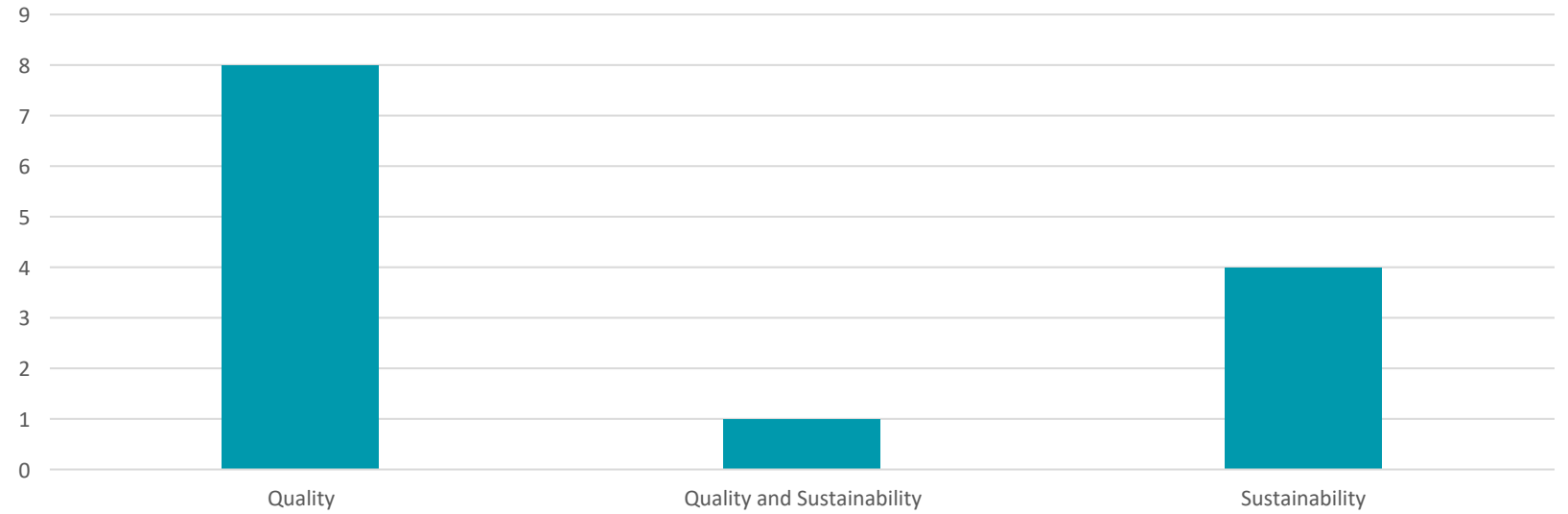
Detail on Risk

Risk ratings allocated by the Strategic and Operational Risk Groups can be based on both quality concerns or concerns about the sustainability of the provision.

The sustainability concerns in the Care Home market relate to financial viability.

The Sustainability concern in the Care at Home market relates to a provider's late invoicing characteristics (being worked through).

Care Home High and Medium Risks by Risk Type



Care at Home Medium Risks by Risk Type



Oldham's Market Position Statement

A Market Position Statement (MPS) is information produced by local authorities to comply with their market shaping duties under the Care Act 2014. The content reflects the local authorities understanding of their existing markets.

The Market Position Statement details the number of people we support through our many commissioned services, the predicted future demand, and our overall commissioning intentions.

Statistical data is extracted from the Office of National Statistics (ONS) 2021, Projecting Older Peoples Population Information (POPPI) and Projecting Adult Needs and Services Information (PANSI) to support the Market Position Statement.

Our MPS is published on the website: [Understanding Oldham's health and adult social care market | Understanding Oldham's health and adult social care market | Oldham Council](#)

Supply and Demand: Ageing well market

Service Type	Supply	Demand	Summary
Residential care	Stable	Stable	We will reduce the number of standard residential care beds we have across the borough to increase occupancy and quality in other homes and provide alternative care options for older people.
Nursing care	Decreasing	Increasing	We have faced a significant decline. We will continue to work with providers to develop nursing capacity across the borough, including complex dementia provision to support the pressures in the market.
Dementia care	Decreasing	Increasing	We will continue to work with providers to improve our dementia offer to service users and their families.
Intermediate care/ reablement	Increasing	Increasing	We want to support more people requiring intermediate/reablement care in their own home The TOMs model promotes reablement services before packages of care are required. A full review is taking place of the intermediate care in older adults in 2024/25.
Day services	Stable	Decreasing	We are due to tendering a framework in 2024/25 to invite providers for sustainable offers in the community with standardised terms and conditions.
Home Care	Increasing	Stable	We continue to work with providers and their support of people in the community. We are considering a complex lot as part of the framework which would help in allocating care packages that are 'complex', for example, support for people assessed as end of life.
Extra Care Housing	Stable	Stable	As we start to reduce residential care, we anticipate the demand for extra care housing to increase. We will review our extra care accommodation to ensure that it meets the needs of Oldham residents. This includes considering night time support.

The make up of the Care Home Market

The majority of the care homes in Oldham are residential with a smaller number providing dual registered (both nursing and residential) and nursing only.

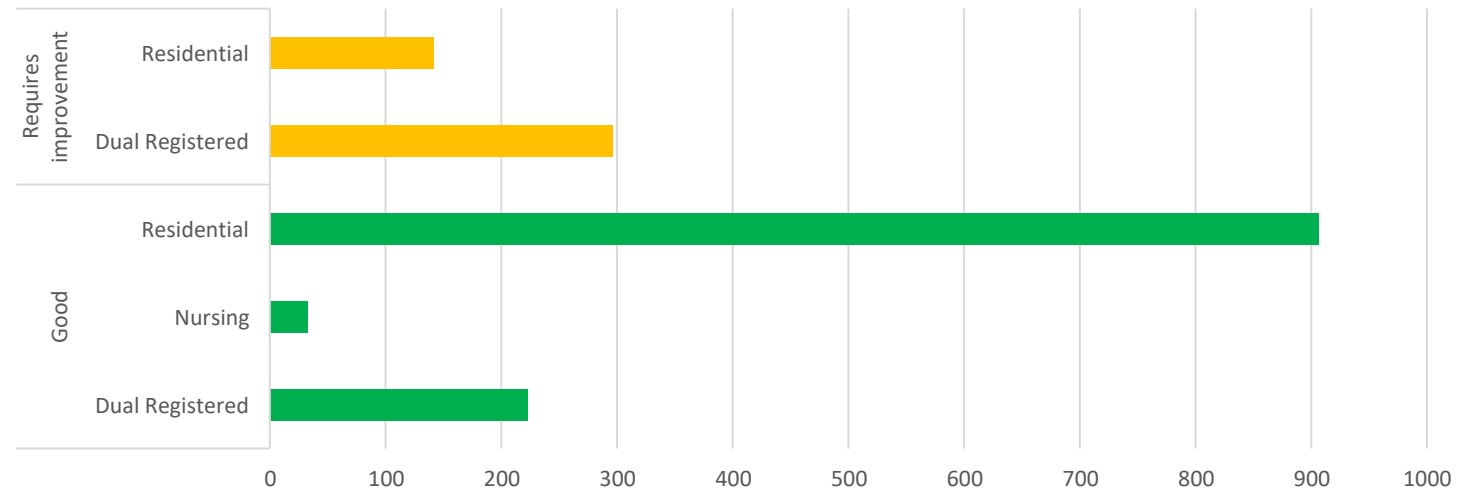
A significant proportion of the beds in dual registered homes are Requires Improvement with the CQC and are also rated as High / Medium Risk. This represents the two largest care homes in the borough.

Nursing supply remains a concern in the borough. An 85 bed dual registered home (including 35 nursing beds) closed in August 2024 following a provider failure process having been invoked. During 2023 an 80 bed dual registered home closed, and two other care homes changed provision on what were general nursing units – one switching to mental health specialism (a loss of 10 beds) and one switching to only offer residential beds for new admissions (which will reduce nursing capacity by 30 beds longer term).

Care Home Type



Care Home Beds by Type and CQC Rating



Supply and Demand: Living well market

Service Type	Supply	Demand	Summary
Early Intervention and prevention	Increasing	Increasing	We will be looking at opportunities to increase our offer around early intervention and prevention, developing support in our communities and ensuring people utilise community assets wherever possible
Direct Payments	Increasing	Increasing	We will be reviewing the direct payments in place, and where there are arrangements in place for strategically commissioned services, we will ensure the appropriate transfers are made and discussions with the individuals involved
Recognised Provider List	Increasing	Increasing	We want to establish a Recognised Provider List to ensure that those people who fund their own care or use a direct payment to manage their care arrangements can select providers who have gone through some due diligence with the local authority
Individualised Service Funds	Developing	Stable	We are developing our systems to enable more Individualised Service Funds in the borough.
Reablement	Increasing	Increasing	In line with the refreshed Adult Social Care Target Operating Model, we are working to increase the capacity of the reablement service in order to support more people to live independently in the community
Housing and accommodation	Increasing	Increasing	We are reviewing housing and accommodation available in the borough to ensure that there is the right type and amount of accommodation with support for younger adults and those with complex and challenging behaviours
Day opportunities	Stable	Stable	Oldham has a range of day opportunities to access for people with a learning disability. We want to work with day service providers with a view to creating a 'Recognised Provider List'

Commissioning and Procurement pipelines

- Review and commission a new Supported Living Provider Framework (contracts in place for **April 2025**)
- Assisted Technology/Care TEC strategic partner (**April 2025**)
- Developing a Commissioning Plan for Complex Residential and Nursing support – market engagement activity **late Autumn/early Winter 2024**
- Development of a Day Services approved provider list
- Brokerage support (external brokers) guidance and assurance for Direct Payment recipients
- Starting to look at the next Care at Home (including Extra Care Housing) tendering exercise in preparation for the end of the current arrangements in **2026**