

MARKET POSITION STATEMENT **2022-2025**



Adult Social Care Provider Market





Adult Social Care Provider Market

Introduction

Bury Council currently enjoys a diverse Adult Social Care provider market and are fortunate to work in partnership with colleagues ranging from large national care Providers to smaller local charities. It is these partnerships, and the relationships fostered and developed over time that has supported the Council, the Providers, and the customers to meet the challenges posed over the last several years.

This Market Position Statement (MPS) has been developed by the Community Commissioning Team Provider Development Pillar and is designed to outline the current provider market, our expectations of current Providers and the opportunities available to them. This should be read alongside the suite of MPS being produced by the Community Commissioning Team including:

- Learning Disability and Autism
- Older People
- Adult Social Care Housing
- Physical Disability
- Mental Health
- Carers
- Prevention

The challenges we face

Demographics

Cohort specific details will be provided in the supporting Market Position Statements outlined earlier but it is clear that the changing demographics pose a real challenge to our current Providers and their ability to meet needs of customers both now and in the future.



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Workforce

A job in the care market needs to be appealing and held in high regard by society. Information from the Skills for Care Workforce Minimum Data Set highlights social care staff turnover rates during 2020 of:

- 38% for direct care staff
- 37% for registered nurses
- 23% of direct care staff

39% of registered nurses are aged 55 and over and therefore likely to leave the workforce within the next 5-10 year. The workforce in Bury is also reliant on employees from both the European Union and further abroad.

18% of the social care workforce are also on zero hours contracts which is lower than the Regional and National averages. This along with recent increase in hourly rates in many competing sectors has put immense strain on Provider's ability to recruit and retain staff.

This is evidenced by Providers in Bury currently having 11% of their total positions vacant and having a turnover rate of 22%.

In 2021 Bury did commit to being a Real Living Wage paying authority and this includes for commissioned services. While sign up to the commitment from Providers was voluntary, 73% of Bury care Providers have signed up to pay all their staff at least the Real Living Wage by April 2023. Key to a properly functioning, high quality and sustainable adult social care market is a workforce that is well trained, professional, caring, appropriately paid with progression opportunities and with satisfaction with both their jobs and employers.

Bury's commitment to the Real Living Wage, working alongside partners at the Bury Workforce Hub and sign up to initiatives including the Blended Roles project aims to ensure sufficient workforce to meet the growing demands of the people of Bury.

COVID

The pandemic has had a huge impact on our already stretched care Providers. The impact of care workers having to isolate and not be able to work due to having COVID symptoms, diagnosis or being a COVID contact cannot be understated.

In January 2022, 89% of Bury care homes were suffering a COVID outbreak and 158 customers had passed away due to COVID which is a devastating statistic. The pressures put on care homes especially with residents having to isolate was also immense, often requiring increased staffing hours when staffing capacity was at premium. The increased testing regime also strained a reduced workforce.

The acuity of customers discharged from hospital during the pandemic has also been higher and only exacerbated the trend of need for more complex provision. Projected need was already showing an increased demand for the more complex nursing and dementia provision and a flatlining of need for standard residential beds and the pandemic has brought this even more in focus, leaving some residential care providers needing to review their care model to ensure longer term viability.

£104.5m

Adult Social Care Expenditure Budget

£69.7m (67%)

spent directly on care services



// Bury is faced with the need to make substantial efficiencies while maintaining the provision of good quality care for its customers //

Financial

Provider costs have increased immensely over the pandemic and current cost of living crisis, putting a huge strain on some already stretched resources. Agency costs for care staff and nurses especially have increased while inflation and energy price increases pose risks to Providers immediate viability. Bury Council is committed to working with Providers to develop suitable and sustainable fee rates to mitigate cost rises and are embarking on their Fair Cost of Care Exercise in partnership with care providers over the coming months.

While these pressures are acutely felt by Providers, the Council is also not immune to the increases in costs and need to make efficiencies. Bury receives the second lowest amount of Social Care Grant in the North West with substantial disparity - noted between Bury and its local neighbours. Like many Councils, Bury is faced with the need to make substantial efficiencies while maintaining the provision of good quality care for its customers and with this backdrop, demand for adult health and social care continuing to increase places an ever-greater strain on shrinking resources.

Current Provider Market

Mental Health

Bury's Mental Health provider market and customer offer is detailed in the relevant Market Position Statement but the borough's Mental Health Provider provision includes; Supported Living, Residential Care and Care at Home. With an annual spend of approximately **£6m** on 294 care packages. This does not include NHS GM Integrated Care contribution.

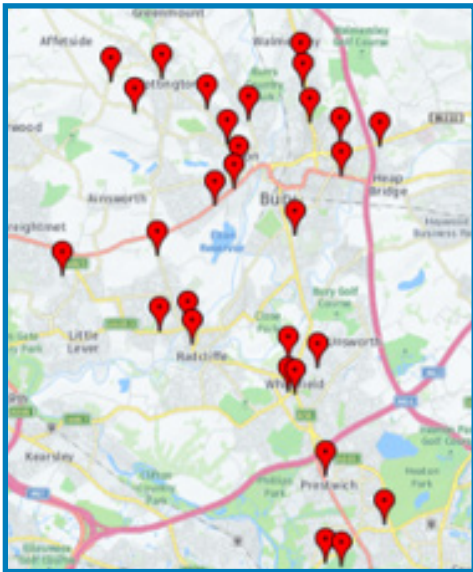
Older People

While for many older people, their care needs are managed informally through support from family friends and neighbours, Bury Council is committed to support those people where this informal support is not an option.

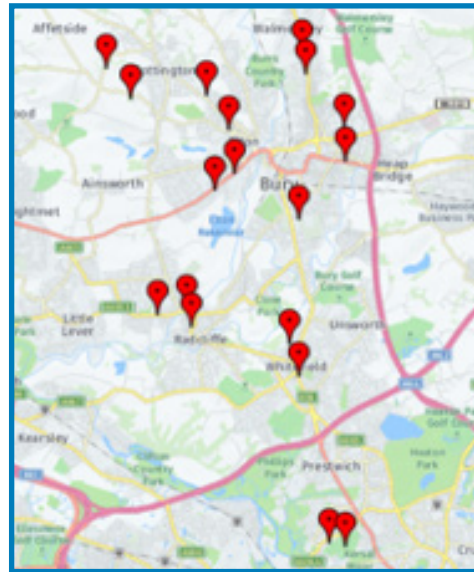
In the last financial year 2020/21 Bury Council funded approximately **£25m** on 1719 care packages for people over the age of 65 with the highest spend being made on Care at Home and Residential and Nursing Care. This does not include NHS GM Integrated Care contribution.

Residential and Nursing Care

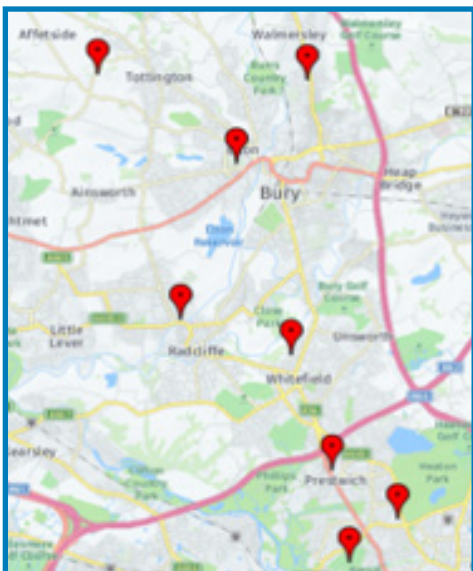
Of the total spend on care packages for those over 65 in year 2020/21, 66% is on 670 funded residential and nursing care placements. As detailed further in the Older People Market Position Statement, the care home market in Bury is currently skewed to supporting customers with lower level needs when, demand for more complex support, including around nursing and dementia is increasing. There are currently 51 Care Homes in the borough with 28 supporting customers over 65. The below maps highlight where existing provision is located:



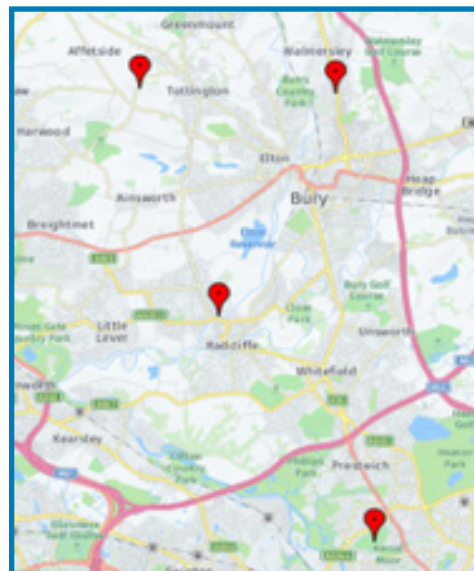
Residential



Residential Dementia



General Nursing



Nursing Dementia

Bury Council will use engagement with the market as well as any other levers it has for shaping the market to meet future need. Having historically paid a flat rate for residential care, in 2019, a dementia and nursing dementia premium was introduced for the first time. The following year a premium for nursing care was introduced and Bury have committed to incentivising those Providers who support the most vulnerable and complex customers in the borough. Table shows Bury rates for previous and future years.

Care Homes	2019/20	2020/21	2021/22 Standard rates	2021/22 Real Living Wage compliant Providers	2022/23 Standard rates	2022/23 Real Living Wage compliant Providers
Residential	£488.05	£502.95	£507.72	£521.14	£548.40	£562.90
Residential Dementia	£503.05	£517.95	£522.72	£536.14	£563.40	£577.90
General Nursing	£488.05	£502.95	£522.72	£536.14	£598.40 excl. FNC	£612.90 excl. FNC
Nursing Dementia	£503.05	£532.95	£567.72	£581.14	£643.40 excl. FNC	£657.90 excl. FNC

While further details are included in the Ageing Well and Older People Market Position Statement, it is clear that the need for care homes to support people with more complex needs, including nursing and dementia support is increasing.

There is a reducing need for standard residential placements going forward with increasing demand for nursing and dementia support. Support is available from the Council Commissioning Team and partners to those providers looking to change their provision to ensure it meets the needs of Bury customers in the future or set up a new provision supporting more complex customers.

Care at Home

Bury re-tendered its Care at Home service in 2021 with the new contract starting in October 2021. There are now 10 Providers covering 5 zones across the borough. Two Providers cover one zone and operate a week on/week off model. Where those 'main' Providers are unable to pick up packages there are now 15 framework Providers who can pick packages borough wide.

The retender aimed to expand the scope of the care at home services by:

- Simplifying the criteria for access to the Care at Home service, allowing for the reduction in spot purchased packages of care and equitability for different customer groups
- Aligning to the Locality Plan, having Providers work across the 5 neighbourhoods, mirroring and aligning to the Integrated Neighbourhood Teams
- Providing a greater focus on partnership working alongside the Integrated Neighbourhood Teams with our care Providers having an equal role in best meeting the needs of the people of Bury
- Encourage innovation and flexibility in service delivery including taking an asset based approached to care and support



- Moving from pilot stage to full roll out of the blended roles programme; which will allow care at home providers to take on low level health tasks. This will help health and social care needs be identified and prevented from escalation as well as improve and optimise the care worker role with defined career opportunities.

Bury currently spends £4.6m on care at home packages of care and there are currently 848 customers, including Older People and those with a Mental Health condition in receipt of support by Bury Care at Home Providers.

Care at Home has been an area of investment for Bury both financial and practice developments with the aim of keeping people well at home for longer. This is partly evidence by the increase in fee rates over the last 4 years, however, further detail will be provided in the supporting Market Position Statements.

Care at Home	2019/20	2020/21	2021/22 Standard rates	2021/22 Real Living Wage compliant Providers	2022/23 Standard rates	2022/23 Real Living Wage compliant Providers	2022/23 KPI
Hourly rate	£15.54	£16.13	£16.50	£16.76	£17.58	£17.86	£21.00

Learning Disability

Bury commission Learning Disability Services via the Greater Manchester Flexible Purchasing System (FPS) which aims to support the commission of person-centred and outcome-focused packages. Placements and packages are run via mini competitions under the FPS and via The Chest Procurement Portal.

While further details can be found in the Learning Disability Market Position Statement, care and support planning by both the Local Authority, and in turn its chosen commissioned providers, must improve outcomes of customers. That rather than maintain independence it should increase, while support plans and provision of the service should be co-produced alongside users. These will form the minimum expectations of provides commissioned to provide support to people with Learning Disability in Bury.

The borough's Learning Disability Providers provide provision including; Supported Living, Residential Care, Day Services, Care at Home and Shared Lives.

Supported Living

The Learning Disability Supported Living Provider market is currently made up of:

- 18 adult social care Providers (17 spot purchased private Providers with the remaining block contracted provider, the Council's own Local Authority Trading Company (LATCO))
- 96 supported living services
- 249 customers
- 30 single occupancy services
- 46 multi occupancy services
- £15.546m Council spend on in and out of borough Learning Disability Supported Living
- Placements are made on a spot purchase basis at all private Providers, while the Council's LATCO are funded via a block contract arrangement

All spot purchase in borough supported living placements are paid at the standard Council rate. Bury's hourly rates for waking hours and sleep ins have consistently been in the top 3 of Greater Manchester Local Authorities with a brief history of rates outlined below:

Supported Living	2019/20	2020/21	2021/22 Standard rates	2021/22 Real Living Wage compliant Providers	2022/23 Standard rates	2022/23 Real Living Wage compliant Providers
Waking Hours	£15.54	£16.13	£16.32	£16.59	£17.40	£10.37
Sleep in	£9.55	£9.55	£9.73	£9.98	£10.37	£10.64

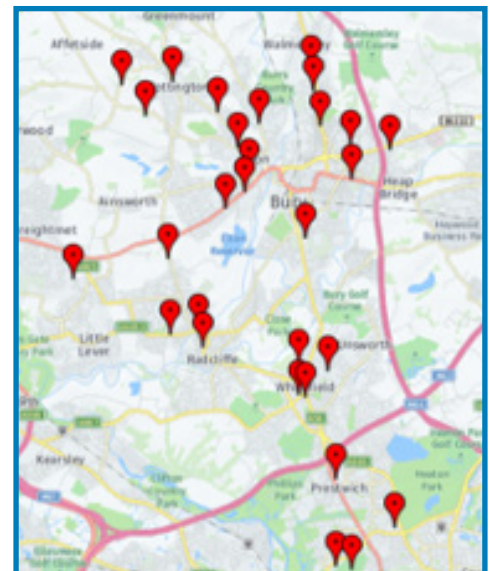
Residential

There are currently 8 Residential Homes supporting people with a Learning Disability, 7 of which provide permanent placements with the other focusing on short term respite:

Spread across the borough, placements are paid at the standard Council rate of **£548.40** for standard and **£562.90** for those Providers who have committed to paying staff the Real Living Wage. Where customer needs are of sufficient complexity these would be funded via the standard one to one rate of **£17.58**.

Those placed out of borough are paid at either host authority rates or where there are no agreed rates, they will be negotiated on a case-by-case basis.

Bury currently spends **£4.224m** on both in and out of borough Residential and Nursing Care for people with a Learning Disability.



Care at Home

Following a recent retender of the Bury Care at Home Service in 2021; Learning Disability Care at Home packages now follow the same route as Older People and Mental Health Care at Home. Working in specific zones, packages are placed via the Council Brokerage Team to the allocate provider in that area. Where these main provides are unable to pick up the package, a framework of back up Providers is accessed.



Opportunities for current Providers

While the supporting Market Position Statements will provide relevant and valuable detail on the direction of Bury's Adult Social Care Market, there are opportunities coming up and available currently to Providers.

- **Real Living Wage** – The Council will pay higher rates for all Adult Social Care services who commit to pay the Real Living Wage by 2023
- **Intermediate Care provided by external Care Provider** – The Council's own internal Intermediate Care Facility at Killelea will focus on supporting customers with nursing and more complex needs. The Council will commission 13 Residential Intermediate Care Beds from the wider Adult Social Care Provider Market
- **Commissioning Contract Options** – The Council is looking to work in partnership with Supported Living Providers at different ways of contracting care and support. The aim being to develop a block contract of support rather than spot packages of care
- **Bury Workforce Hub** are offering Provider's opportunities to take part in a range of pilot schemes including:
 - Access to NHS Professionals Bank Staff
 - Support from Unique Training Solutions with specific recruitment and retention issues
 - Student placements
- **Complex Needs Intermediate Care** – The Council will be looking to work alongside Greater Manchester colleagues and potentially jointly commission an Intermediate Care service specifically for those individuals with high level needs.

// The Council will pay higher rates for all Adult Social Care services who commit to pay the Real Living Wage by 2023 //

- **Potential new Extra Care Services** – The Council is looking at potential sites for a 5 Extra Care Services and care providers will be required for the settings.
- **Respite review** – The Council is currently reviewing its respite provision which may result in a new model and ways of working, potentially presenting opportunities for our Adult Social Care Providers.
- **Day services** – The Council has also started reviewing its Learning Disability Day Service provision, the results of which may also present opportunities for our provider market.
- **Nursing and Nursing Dementia** – There will be a reduction in residential care placements, with an increase in demand for customers requiring nursing and nursing. There will opportunities for the establishment of new nursing and nursing dementia homes or changing current provision to nursing and nursing dementia.

Enablers

Quality Assurance

The Care Act requires councils to promote the effective and efficient operation of its care market in which there is a choice of good quality services.

Bury have historically been one of the top performing authorities in Greater Manchester in respect of the number of Good and Outstanding Providers working in the borough. Providers have worked incredibly hard to achieve these ratings and were supported by an in-depth and robust annual Quality Assurance review carried out by a dedicated Council Quality Assurance team.

CQC ratings across the borough have dropped over the last 2 years however Providers have been working hard alongside the Community Commissioning Team and partners from the NHS GM Integrated Care and CQC to return to compliance. Currently in Bury:



Care at Home

- All 24 Providers rated **Good** with CQC

Care Homes

- 51 Care Homes:
 - 2 **Outstanding**
 - 39 **Good**
 - 6 **Requires Improvement**
 - 4 **Inadequate**

Supported Living

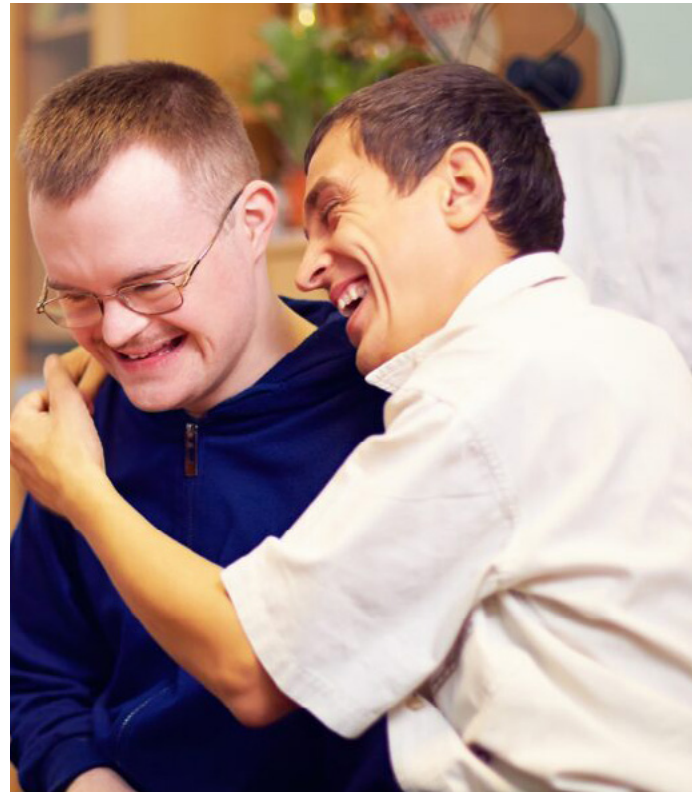
- All 18 in-borough Providers rated **Good** with CQC

While the previous Quality Assurance Framework was based on the old Essential Standards by CQC, Bury have committed to completely refreshing this in partnership with NHS GM Integrated Care, Infection Control, Providers and customers. The aim is to develop a joint quality assurance process, across stakeholders that has a proactive schedule of routine, comprehensive quality assurance reviews across care services that result in a published report and where issues are identified an agreed action plan is developed. Rather than quality assurance reviews being a snapshot of a point in time. They will be informed by intelligence from people who use services, the Council's Safeguarding Team, complaints and concerns received and engagement with the Care Quality Commission (CQC).

As part of our commitment to engagement when refreshing our Quality Assurance process, this is not just engagement with fellow professionals and providers colleagues, this includes engagement with customers. We will work alongside customer groups and local advocacy services to ensure that any process is built upon the users' expectations of quality. We will also look to work alongside customers in the carrying out of Quality Assurance reviews and use their expertise and feedback in assessing quality in our contracted providers. This could be through experts by experience, but we will be led by the suggestions we receive from our engagement with customers.

All Providers will have a dedicated Integrated Commissioning Support Officer who will be there first point of contact for concerns, issues and updates; building on the positive relationships that have developed over the last few years.

The Council is also starting to develop an overachieving Quality Improvement Strategy that will detail our commitment to quality improvement and what measures we have in place to support providers with this.



GM Capacity and Demand Toolkit

The Greater Manchester Health and Social Care Adult Social Care (ASC) Transformation Team and Business Intelligence Team has been given a mandate to deliver an operational ASC marketplace capacity and demand tool by Spring 2022. The aim is for the wider product to ultimately cover quality, risk, recruitment needs and much more, the initial capacity and demand model will explore the type of care and support needs that are increasing/in decline, what kind of investment will be needed to support these cohorts, the kind of housing required, the steps necessary to support out of borough placements and linking to the GM discharge improvement plans.

While further detail will be shared as and when it becomes available this promises to be a powerful tool for both Commissioners and Providers in showing current and predicated demand in particular service areas.

Provider Engagement

Bury Council Community Commissioning Team aims to put provider engagement at the heart of the work it does with a range of mechanism to achieve this:

**Dedicated
ICSO**

**Provider
Bulletin**

**Team email
inbox and
phone
number**

**Operational
Provider
Forum**

**Strategic
Engagement
Group**



The Council provides a dedicated, allocated Integrated Commissioning Support Officer (ICSO) to each of its contracted providers. An officer who acts as providers first point of contact for discussions around their service, contract, engagement and development opportunities.

The Commissioning Team also has a dedicated team inbox and contact, where the latest guidance, valuable updates and policy changes can be shared with providers for feedback and input, while the team also produce and disseminate a weekly bulletin.

The team continues operate Quarterly Operational Forums for specific Provider sectors as well as Strategic Engagement Groups. The Operational Forums provide Registered Managers and operational staff the opportunity to input into local initiatives and programmes of work, receive updates and useful information from local, regional and national partners as well as the opportunity to discuss challenges, and changes, with fellow providers.

The Strategic Engagement Groups provide a space for our Providers' Chief Officers, Contract Managers and Registered Managers etc to meet with the Community Commissioning Team's Strategic Leads and take a real partnering role in shaping the strategic direction of services in Bury. The aim of the group is:

To provide a forum for partners to be engaged with a take a leading role in influencing strategic plans of Bury Council

- To review/challenge/discuss proposal and initiatives
- To act as the main point of engagement in respect of the annual fee setting process
- To provide a forum for Providers to set their own agenda items and discussing areas that are important to them
- To provide partner members with updates on specific pieces of work where there may be interdependencies

// The Council provides a dedicated, allocated Integrated Commissioning Support Officer (ICSO) to each of its contracted providers //

- To work with other work streams to ensure awareness and interdependency throughout the system

Brokerage

The Brokerage Service is an essential part of the core assessment and care management processes in ASC. It is responsible for provisioning both care at home packages and care home placements based on requirements provided by the social workers and hospitals.

The service manages nearly 600 requests each year and supports emergency situations, actively working alongside Providers to resolve capacity issues and ensure flow through the system.

The Covid 19 pandemic resulted in the Brokerage process being re-engineered with them managing hospital discharges into Care Homes for the first time and this has continued following the step down in restrictions.

Workforce Hub

To ensure that the Bury health and social care system could be supported appropriately during Covid 19, the Bury Local Care Organisation (LCO) established a system wide workforce hub with the objectives of:

- Undertaking a system wide skills audit
- Creating a system wide skills database
- Establishing and facilitating a system wide workforce deployment process
- Providing access to a system wide temporary workforce in partnership with Reed agency and overseeing the management of this
- Establishing the baseline understanding of training provided in respect of COVID 19 across the system to identify potential opportunities for future synergies

Organisations contributing to the Bury Workforce Hub included a number of the LCO Partner organisations all supported by the Bury LCO team.

As a result of the establishment of the LCO Workforce Hub, skilled workers have been able to be deployed throughout the health and social care system in response to unprecedented pressures associated with COVID 19.

Through the skills database, they were able to deploy workers from one organisation to another including practice nurses from primary care being deployed to support district nursing. Through their partnership with Reed, in excess of 1200 shifts were covered system wide, the majority at a fill rate of 100%. Significantly, the Reed offer had supported nursing and care homes to enable them to continue to support the acute and community sectors.

Whilst they had already established strong professional relationships sector wide, the formation of the workforce hub further strengthened system wide working amongst the HR teams. In addition, the Workforce Engagement Forum continued throughout the pandemic which enabled system wide partnership working with our Staff Side and Union colleagues.

Similarly, they have now established a system wide workforce group which has absorbed the function of the former LCO Workforce operations group whilst enabling an effective response to unfolding challenges.

The role, remit and responsibilities of the workforce hub have widened to include innovative recruitment programmes with particular emphasis on the private, voluntary and independent sector creating a Bury offer for each employing organisation to use. Bury endeavours to ensure sufficient workforce and as well as provide vital support in this area, this includes working alongside local education settings to support the development of the next generation of health and social care staff with the focus not only on ensuring sufficient workforce now, but sufficient workforce in the future.