



GIG
CYMRU
NHS
WALES

Bwrdd Iechyd Prifysgol
Bae Abertawe
Swansea Bay University
Health Board



Meeting Date	07 September 2022	Agenda Item	2.1
Report Title	West Glamorgan Regional Market Stability Report 2022		
Report Author	Melanie Blake, Transformation Manager, West Glamorgan		
Report Sponsor	Siân Harrop-Griffiths, Director of Strategy		
Presented by	Melanie Blake, Transformation Manager, West Glamorgan		
Freedom of Information	Open		
Purpose of the Report	<p>Market stability reports are a tool to assist RPBs in planning and commissioning quality care and support for their populations. The reports should help RPBs to determine the overall shape and balance of the market for care and support within the region.</p> <p>Section 144B of the Social Services and Well-being (Wales) Act 2014 requires local authorities, working with local health boards, to prepare and publish market stability reports, and make provision for regulations setting out the form these must take. These matters are set out in the Partnership Arrangements (Amendment) and Regulated Services (Market Stability Reports) (Wales) Regulations 2021.¹</p> <p>Under these regulations, the report must be approved by the Local Health Board, after formal approval has been given by the RPB.</p>		
Key Issues	<p>Market stability reports will help local authorities and Local Health Boards to better understand the social care market within each locality, particularly with respect to regulated services such as care accommodation, domiciliary care and fostering. As well as describing the current composition and dynamics of the social care market, the reports address wider issues such as market trends, sustainability of provision, risks to market stability and the impact commissioning practices have on the market.</p>		

¹ Welsh Government: Market stability reports: code of practice. Code of Practice and guidance on the exercise of social services functions and partnership arrangements in relation to market stability reports. 29 March 2021

	<p>In considering the report, the Health Board should recognise that:</p> <ul style="list-style-type: none"> • There are inappropriate placements in hospital beds due to lack of capacity in other settings • The pressures on the domiciliary care market and the challenges this presents needs greater focus • Step up services are not identified. <p>The Health Board, with LA partners, is shortly to commission a review of beds to provide a strategic approach to alternative options, and this may impact on further versions of the Report.</p> <p>The Report was considered and approved by the RPB on the 7th of July 2022 however it needs to be formally approved by each of the statutory partners in the RPB.</p> <p>The two local authorities will be approving the report in September/October. This has been delayed due to local council elections taking place earlier on in May this year.</p>			
Specific Action Required <i>(please choose one only)</i>	Information	Discussion	Assurance	Approval
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Recommendations	<p>Members are asked to:</p> <ul style="list-style-type: none"> • Approve the Market Stability Report for onward submission to Welsh Government. 			

West Glamorgan Market Stability Report 2022

1. INTRODUCTION

Market stability reports are a tool to assist RPBs in planning and commissioning quality care and support for their populations. The reports should help RPBs to determine the overall shape and balance of the market for care and support within the region. This is the first year that market stability reports have been required.

The primary audience for the market stability report is local authorities and Local Health Boards, in their role as statutory partners of RPBs. The document will also be of interest to other partner agencies and sectors represented on RPBs including the third sector, care and support providers, housing representatives, citizens who need care and support, and their families and carers.

2. BACKGROUND

Section 144B of the Social Services and Well-being (Wales) Act 2014 requires local authorities to prepare and publish market stability reports, and make provision for regulations setting out the form these must take. These matters are set out in the Partnership Arrangements (Amendment) and Regulated Services (Market Stability Reports) (Wales) Regulations 2021.²

In preparing their market stability reports (MSR), local authorities are required to consult with the Local Health Board. The preparation and publication of market stability reports must be carried out on a regional footprint. From the individual reports the RPB must consolidate into a Regional MSR.

The West Glamorgan MSR was approved at the Regional Partnership Board meeting on the 7th of July. Following formal approval at RPB, the report requires approval by full council and similar decision making body within the Health Board.

The market stability reports are the next step in the development of long term commissioning strategies for the care and support needs of local communities, including the development of accommodation that is fit for the future.

Findings

There are 12 chapters in the West Glamorgan Market Stability Report.

Care Home Services – Older Adults

- There are sufficient number of available residential and dual registered beds in the area, however it is not always possible to place in the beds available
- There are relatively few homes offering specialist/complex dementia nursing care

² Welsh Government: Market stability reports: code of practice. Code of Practice and guidance on the exercise of social services functions and partnership arrangements in relation to market stability reports. 29 March 2021

- There is instability in the sector due to severe workforce issues combined with the current cost of living crisis
- Monitoring visits and Care Inspectorate Wales (CIW) inspection reports demonstrate an overall high quality of care home provider
- There is good partnership working between providers and commissioners
- Demand for care home beds reduced over the pandemic but is now returning to pre-pandemic levels
- More work is required with providers to support them to adapt to be able to meet the needs of the future population of the region, and to gain a better understanding of the type of support that will be required

Care Home Services – Children

- The Children's Social Care Market Study by the Competition and Markets Authority (CMA) concluded that the residential (and fostering) market is challenging. This is an issue shared by many local authorities across Wales and England
- Partners will review its strategic and commissioning plans in 2022 and continue to work with regional and national partners to support market wide developments
- The independent residential care market is at risk from the potential implementation of Welsh Government policy commitments. This will need to be monitored closely

Care Home Services – Younger Adults

- The specialist care homes market across the region is considered to be stable
- There have been increases in the number of placements for both learning disability & mental health over the 5-year period
- Monitoring visits and CIW inspection reports demonstrate an overall high quality of care home providers
- Workforce pressures and rising costs present stability risks
- Work is being undertaken by each Local Authority to redevelop the market so that it better reflects the preferred wishes of individuals

Secure Accommodation – Children

- Neath Port Talbot County Borough Council own and operate Hillside Secure Children's Home
- Hillside is the only secure children's home in Wales and has been assessed as providing sufficient levels of provision to meet previous, current, and future local demand
- Hillside is currently reviewing its service model to 'future proof' its service to ensure it is able to accommodate the future demands of the provision as well as being financially sustainable in the long term

Fostering

- Foster carer retention/recruitment is a problem across the region – as it is across Wales and England - as the numbers entering fostering each year is struggling to keep up with demand

- The most notable market gap is the limited availability of local placements for children aged 11+
- Overall, service quality is good across the foster care market

Adult Placement – Shared Lives

- Demand has differed with each Local Authority
- Over the last 5 years there have been only a small number of unsuccessful placements
- Monitoring visits and CIW inspection reports demonstrate an overall high quality of provision
- The number of carers has grown steadily over the period
- Expansion of services to promote use amongst other population groups is being explored

Advocacy – Adults

- There is one provider that covers the region, and provision is currently stable
- Further promotional work is underway to increase use of advocacy services for hard to reach groups
- Demand is expected to increase over the next 5 years
- Monitoring reviews demonstrate an overall high quality of provision

Advocacy – Children

- The Independent Professional Advocacy (IPA) Service is commissioned on a regional basis. It has been assessed as sufficient to meet previous, current and future demand
- Young people have provided positive feedback on the quality of the IPA Service and their achievement of personal advocacy outcomes
- Monitoring reviews demonstrate an overall high quality of providers

Domiciliary Care – Older Adults

- Domiciliary care demand continues to exceed supply
- Future longer-term demand is expected to increase in line with population growth
- Workforce issues, coupled with increased demand, is making it difficult for the region to meet current demand
- Monitoring visits and CIW inspection reports demonstrate an overall high quality of provider
- There is good partnership working between providers and commissioners
- Alternatives to traditional domiciliary care are required to keep pace with demand for services

Domiciliary Care - Children

- The domiciliary care market has seen a substantial growth in demand throughout the COVID-19 pandemic

- In response, the market has demonstrated flexibility and growth to meet levels of demand but at times this has led to maximised market capacity
- Overall, the market is delivering good quality services

Domiciliary Care – Younger Adults

- Services are of a good quality with low incidence of formal contract compliance or breaches in regulatory standards
- Since the pandemic, staffing has become one of the key risks to market to market stability and sufficiency
- Increased future demand for specialist services and care at home is anticipated and more accurate demand forecasting is needed

Adoption

- The Western Bay Adoption Service (WBAS) is a regional service across Swansea, Neath Port Talbot and Bridgend
- The number of children coming through for adoption has reduced
- The number of adopters has increased demonstrating that the process is working effectively
- Working regionally has supported resilience and quality
- Entry to the market is highly regulated and the arrangements are working well

Conclusion

The sector across the region is currently under severe pressure, however, the MSR suggests that there is sufficient capacity within the sector to meet demand – with the possible exception of specialist complex/dementia nursing care.

Throughout the COVID19 pandemic, partners within the West Glamorgan Region demonstrated that when working together with the same goals, it was possible to overcome the challenges presented. New models of care now need to be considered to support individuals and communities, and working as a region will enable this challenge to be met.

In considering the report, the Health Board should recognise that:

- There are inappropriate placements in hospital beds due to lack of capacity in other settings
- The pressures on the domiciliary care market and the challenges this presents needs greater focus
- Step up services are not identified.

The Health Board, with LA partners, is shortly to commission a review of beds to provide a strategic approach to alternative options, and this may impact on further versions of the Report.

<p>There will be a new project group set up under the Transforming Complex Care Programme to evaluate each chapter, decide where the gaps are and clarify next steps for each chapter, including those areas where a regional response would be beneficial.</p>

3. GOVERNANCE AND RISK ISSUES

There are no governance and risk issues associated with this report.

4. FINANCIAL IMPLICATIONS

There are no financial implications directly associated with this report.

5. RECOMMENDATION

The Board is recommended to:

- **APPROVE** the report for publication

Governance and Assurance		
Link to Enabling Objectives (please choose)	Supporting better health and wellbeing by actively promoting and empowering people to live well in resilient communities	
	Partnerships for Improving Health and Wellbeing	<input checked="" type="checkbox"/>
	Co-Production and Health Literacy	<input type="checkbox"/>
	Digitally Enabled Health and Wellbeing	<input type="checkbox"/>
	Deliver better care through excellent health and care services achieving the outcomes that matter most to people	
	Best Value Outcomes and High Quality Care	<input type="checkbox"/>
	Partnerships for Care	<input type="checkbox"/>
	Excellent Staff	<input type="checkbox"/>
	Digitally Enabled Care	<input type="checkbox"/>
	Outstanding Research, Innovation, Education and Learning	<input type="checkbox"/>
Health and Care Standards		
(please choose)	Staying Healthy	<input type="checkbox"/>
	Safe Care	<input type="checkbox"/>
	Effective Care	<input type="checkbox"/>
	Dignified Care	<input type="checkbox"/>
	Timely Care	<input type="checkbox"/>
	Individual Care	<input type="checkbox"/>
	Staff and Resources	<input type="checkbox"/>
Quality, Safety and Patient Experience		
NA		
Financial Implications		
NA		
Legal Implications (including equality and diversity assessment)		
The market stability report code of practice is issued under sections 145 and 169 of the Social Services and Well-being (Wales) Act 2014		
Staffing Implications		
NA		
Long Term Implications (including the impact of the Well-being of Future Generations (Wales) Act 2015)		
<p>Long term: Development of long term commissioning strategies to support local communities with their accommodation needs</p> <p>Integration: Development of care and support that is fit for the future of our local communities</p> <p>Involvement: Commissioning strategies will have involvement from individuals that require care and support at the moment and in the future, along with providers currently delivering services</p> <p>Collaboration: This is a regional piece of work, developed in collaboration with other RPB partners</p> <p>Prevention: Developing care and support to have the least restrictive option available when required, preventing the escalation into higher levels of support</p>		
Report History	West Glamorgan Transformation Board – 21 st June 2022 West Glamorgan Regional Partnership Board – 7 th July 2022	
Appendices	West Glamorgan Regional Market Stability Report 2022	