

Meeting of:	<b>Healthy Living and Social Care Scrutiny Committee</b>
Date of Meeting:	<b>Tuesday, 03 December 2024</b>
Relevant Scrutiny Committee:	Healthy Living and Social Care
Report Title:	Cardiff and Vale of Glamorgan Market Stability Report 2022 - 2027: Annual Delivery Plan 2024
Purpose of Report:	To provide an update on progress on the Cardiff and the Vale of Glamorgan Market Stability Report 2022 and share the key findings of the Local Annual Delivery plan with Elected Members of the Scrutiny Committee.
Report Owner:	Director of Social Services
Responsible Officer:	Iain McMillan, Head of Resource Management & Safeguarding
Elected Member and Officer Consultation:	Rachel Evans Head of CYPS, Jason Bennett Head of Adults Services & Vale Alliance Operational Managers & Team Managers within the directorate. Cath Doman Director of Health & Social Care Integration, Regional Partnership Board.
Policy Framework:	Development and publication of the Market Stability Report (MSR) is a statutory duty under Section 144B of the Social Services and Well-being (Wales) Act 2014 ('the 2014 Act'). The Act 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. These matters are set out in the Partnership Arrangements (Amendment) and Regulated Services (Market Stability Reports) (Wales) Regulations 2021.  Local Authorities <b>must</b> work with their Regional Partnership Board (RPB) partners to keep the market stability reports under regular review and revise them as necessary. The market stability assessment will need to be reviewed whenever significant changes occur within the social care market, so that the report remains a 'live' document throughout the whole of the five-year cycle. Regular review will, for example, allow Local Authorities and their RPB partners to trace patterns of market entry and exit, identify new and emerging trends in provision, and mitigate or manage the risks to the stability of the social care market.

	<p>Market stability reports must be reviewed at least annually. If significant changes are identified following the annual review, Local Authorities must produce either a revised report or an addendum, which must be published on local authority websites, and submitted to the Welsh Ministers.</p>
<p>Executive Summary:</p> <ul style="list-style-type: none"> <li>• This report highlights the key findings of the work undertaken in the review at a local level of the updated needs of the Vale of Glamorgan during Q2 2024 in relation to the Market Stability Report (MSR).</li> <li>• The MSR was undertaken between October 2021 and July 2022. The dedicated engagement undertaken during development of the Population Needs Assessment (PNA) as well as existing data and reports were used to inform the MSR, alongside dedicated engagement work in the form of focus groups with professionals and providers. The report was published in 2022.</li> <li>• A summary of changes to the market since publication of the Cardiff and the Vale of Glamorgan Market Stability Report (MSR) was presented to Scrutiny in December 2023 and gave an overview of changes to demand and supply within the Vale of Glamorgan since initial publication.</li> <li>• A review of the PNA in 2022 noted improvements in care and support services continue to be made across all population groups since the 2017 Population Needs Assessment. COVID-19 has had several impacts, including increasing demand for services, especially because of mental health issues, and changing models of delivery for many services. The longer-term impact on care and support needs of our population, and the market’s stability will require continual monitoring to ensure market sufficiency.</li> </ul> <p>The full Market Stability Report can be found here  <a href="https://cavrp.org/app/uploads/2023/03/Market-Stability-Report.pdf">https://cavrp.org/app/uploads/2023/03/Market-Stability-Report.pdf</a></p> <p>The full Population Needs Assessment can be found here  <a href="https://cavrp.org/app/uploads/2022/05/PNA-English-v2.pdf">https://cavrp.org/app/uploads/2022/05/PNA-English-v2.pdf</a></p>	

## **Recommendations**

1. That Scrutiny Committee considers the changes to the market since publication of the Cardiff and the Vale of Glamorgan Market Stability Report (MSR). The key changes and the local priorities are set out in this report and build on learning from the review in 2023.
2. That Scrutiny Committee provides feedback to inform the next stages of implementation in relation to the local priorities for 2025 and beyond highlighted within this report.

## **Reasons for Recommendations**

1. To ensure Scrutiny Committee is updated with respect to changes in demand and service availability since the Market Stability Report was published in 2022, updates in 2023 and revised findings for 2024.
2. To enable the Committee to inform the future development of regulated and support services, so they are sufficient to meet the population's future care and support needs.

## **1. Background**

- 1.1 The Market Stability Report (MSR) was developed by the Regional Partnership Board, following engagement work with health and social care professionals, third sector organisations and independent providers.
- 1.2 The Social Services & Well-being (Wales) Act 2014 specifies regulated services which should be included within the MSR. These are presented in the MSR as individual sections. Sections include details of the current service landscape, the services required to meet the needs of our citizens, a stability assessment (risks to the market segment) and the actions required. Additional sections consider the sufficiency of services to meet future needs and the strategic themes which will require consideration to ensure stability of regional care and support markets while developing the market capacity in the region, so it is sufficient to meet anticipated levels of future care and support needs.
- 1.3 The MSR has close links with the Area Plan, a 5-year partnership plan, which has also been considered by Scrutiny Committee.
- 1.4 This scrutiny report is informed by the changes in demand and in the market that have taken place since the engagement work was undertaken for the regional MSR in 2021/22 and builds on review activity completed in 2023. Our analysis enables consideration of future projected need and informs our forecast of what is required. However, it's important to highlight that these projections are subject to changes in the market that can be difficult to predict. It is in that

uncertain context that this report identifies the commissioning priorities for our population.

## **2. Key Issues for Consideration**

- 2.1** Pressures on Adult and Children and Young People Services continue to increase significantly. There are a higher number of children in Local Authority care. These children require local support services and local placements to meet their needs. More adults are being assessed as requiring more complex packages of care and support and the Local Authority has worked hard with providers to ensure that this increasing need can be met. The demographic of our adult population means that the need for care and support services will continue to increase.
- 2.2** When the MSR was undertaken in 2021/22 the region was emerging from covid and since this time there have been changes within the market. Some areas of the market have recovered well. An example of this is in relation to domiciliary care for adults. Whilst the market situation has now improved, and packages of care can be placed quickly it remains fragile, an area of pressure which is influenced by external factors. There are no longer significant delays in placing domiciliary packages of care in within the Vale of Glamorgan. Currently our performance in this area is amongst the best in Wales. This performance whilst very positive for families in the Vale of Glamorgan in turns leads to an increased budget spend. However, provider fragility remains because of changes to employment law. In particular the care industry relies heavily upon overseas workers with associated Home Office visa requirements with more providers coming to the market there is greater competition to deliver packages of care, which adds risk to individual agencies. The Council has recognised this risk with so many new providers presenting so we have taken the decision to pause accreditation of any new agencies. This is reviewed on a quarterly basis by the Operational Manager for Commissioning and Finance and Head of Resource Management and Safeguarding, in line with changes to demand and capacity.
- 2.3** Our 2024 update of the MSR has identified several priority areas and in the main they replicate the priority areas that were identified in the previous year. It will be a huge challenge for the Vale of Glamorgan to be able to ensure that all these competing needs are met in full. To prioritise and focus attention on those areas we have set out key actions that need to be undertaken within our updated report. Set out below are the identified priority areas for services:

### **Children and Young People Services**

- 2.3.1** Residential accommodation for Children Looked After remains an area of high priority due to an increase in demand but also as a response to the Welsh Government's proposals to eliminate profit from the care of Children Looked After by March 2026. Sufficiency of placement types across the placement spectrum is weak in all nations of the UK and current policy direction in Wales aims to rebalance the public sector

away from reliance on commissioning external providers to a stronger public sector offer.

- 2.3.2** The Vale of Glamorgan has a substantial programme of work to ensure the sufficiency of placement provision for children and young people in our area.
- 2.3.3** Two in area residential homes in partnership with the third sector are now in place. We have plans to develop two further residential homes in the next 18 months. These developments are included in the Council's invest-to-save programme and will be submitted for Welsh Government for capital grant funding. When these homes are registered, they will further increase the in area not for profit residential provision from 6 beds to 10 beds for mainstream residential provision. Projections highlight that provision of in area residential accommodation for children and young people continue to be an area of priority.
- 2.3.4** We continue to experience an increase in Unaccompanied Asylum-Seeking Children being placed with the Local Authority, with potentially up to 10 further Unaccompanied Asylum-Seeking Children expected to arrive during the financial year. We have plans in place to create 10-12 supported accommodation (not for profit beds) for looked after Unaccompanied Asylum-Seeking Children. This will allow us to move existing children placed out of area with a for profit provider, into local not for profit provision and increase our capacity to respond to new referrals. Two houses have been identified, one is in the process of renovation and the other is being purchased. It is intended these homes will go live in July 2025.
- 2.3.5** Supported accommodation for Care Leavers was identified as an area where demand is outweighing supply. A suitable 3 bedroomed property for young people between the ages of 18 and 21 who are leaving care, with on-site support provided, is needed. The need has also been identified for a further 4 bedroomed House of Multiple Occupation for Care Leavers.
- 2.3.6** Parent and Child Fostering Provision is a further area of need. It was identified the Local Authority would benefit from having increased numbers of in-house foster carers to be specifically trained and supported to provide placements for parent and child placements. We have three parent and child foster placements in house, and we plan to increase this further.
- 2.3.7** In relation to Foster Carers and Connected Persons, the Fostering Service has a strategy to increase its number of foster carers by 10 households a year. This number is both ambitious and realistic. We are also actively targeting independent fostering agency carers to transfer to the Local Authority. Given the increase in the number of Children Looked After there needs to be an increase in the recruitment of mainstream foster carers to meet demand, and continued emphasis on identifying

Connected Persons to provide care and support to Children Looked After with wider family networks.

- 2.3.8** We have also developed an emergency fostering service, which includes a pool of peripatetic foster carers and emergency fostering accommodation. We have one emergency fostering accommodation in place and are seeking to source a second.
- 2.3.9** The numbers of children being referred for adoption are projected to continue rising, with the need for more adopters to be approved to meet this need. There is an increasing need for additional therapeutic support for adopted children and young people, with spend in this area predicted to rise.
- 2.3.10** In addition to adoption services, there is an increasing need to provide access to therapeutic support for children looked after and those on the edge of care. Access to therapeutic support is provided in the main via Cardiff and Vale UHB, and at times externally commissioned. In addition to working with individual young people, this support provides placement stability and development of a local trauma informed workforce.

### **Adult Social Services**

- 2.3.11** Care at home – Domiciliary care capacity has been increased to ensure the Council is able to support citizens who are assessed as requiring care and support in their own homes. There remains fragility in this area of the market due to changes to employment law and overseas worker arrangements. Some providers rely on over 90% of overseas workforce operating under strict home office conditions. The Operational Manager for Commissioning and Finance will continue to engage with the provider market monthly to assess risk and fragility in addition to regular review with the Head of Resource Management and Safeguarding of the approved provider arrangements.
- 2.3.12** Residential and nursing care for citizens aged 65+ - there are limited numbers of vacancies within existing residential and nursing homes in the Vale of Glamorgan. With the age and support projections within the PNA and MSR, there is a need for further beds to be established. We have a gap in dementia nursing care which is resulting in limited choice for individuals and families. We are working with neighbouring Authorities to ensure a wider choice for citizens in choosing a home, however services do have waiting lists. It is likely that the majority of care home provision will need to be able to support citizens with dementia by March 2027 and dementia training has been offered to all providers. Our 6 bed reablement unit at Ty Dyfan will be reviewed in the next financial year as part of planning for future delivery.
- 2.3.13** Residential and nursing care for citizens aged 18 to 64 – with more citizens being diagnosed with early onset dementia, this is an area where care home provision will need to be developed or existing provision

adapted, with appropriate upskilling of staff. Several commissioned providers have identified this as an area of need within their business plans. We will also work with those providers to ensure they modify their facilities to meet this area of growing need.

- 2.3.14** Increasing choice for residents to have their care and support needs met within a community of support. The planned new Extra Care facility in Penarth is set to open after Winter 2026. We are working with the Extra Care Project Board to ensure that the findings from the MSR continue to inform the development of this project in relation to current and future citizen need so that it remains fit for purpose within the changing context of our population.
- 2.3.15** Supported living (Learning Disabilities) – We continue to identify further properties, with one due for completion by February 2025, and another core and cluster development for four people due to start in 2025/26. These will be utilised as supported living for citizens with a learning disability who wish to maintain their own tenancies within communities. The team is working closely with Registered Social Landlords, to ensure that any grant funding opportunities that are available are utilised to increase provision.
- 2.3.16** Demand for residential college placements remains stable year on year. We are focusing on increasing the local offer for people with complex needs to provide an alternative offer to residential educational provision. Expansion of the skills and knowledge of the complex needs' day service has seen an increase in people choosing to access this service. Over the next year, we will be working with Cardiff and the Vale College in developing a partnership with the day service to deliver educational opportunities locally.
- 2.3.17** Accommodation for people with substance dependency – this has been identified as an area of need by the Area Planning Board, and a report with recommendations for future delivery of services will be completed by March 2025.
- 2.3.18** Shared Lives Scheme (Previously called Adult Placements) – 60% of current Host carers are now over 60 years of age. A 10% increase since December 2023. Significant numbers of new Hosts need to be identified, trained and supported to ensure that future levels of demand can be met and to meet the aspirations to promote and grow the service. The Shared Lives Service has a development plan in place to address these issues working in partnership with Bridgend Council with whom we operate this regional service.
- 2.3.19** Staff recruitment – The fragility of staffing services is a theme that aligns across all service areas. In particular changes to employment law and regulations regarding overseas workers and Home Office compliance pose challenges.

- 2.3.20** Unpaid Carers – More progressive and creative ways to support unpaid carers to access a break/respice from caring whilst maintaining responsibilities are required. Small grants have been made available for respice from the Regional Partnership Board, and the Unpaid Carers team will continue to maximise opportunities and communication to unpaid carers across the Vale of Glamorgan.
- 2.4** The MSR is a regional report, and while the above are local priorities for the Vale of Glamorgan. We need to ensure we are suitably prepared to deliver for our residents in the future. We continue to work on integrating services and delivering on a regional basis where sensible to do so.

### **3. How do proposals evidence the Five Ways of Working and contribute to our Well-being Objectives?**

#### **Five Ways of Working**

- 3.1 Long term:** The Code of Practice states that each MSR must look forward to the subsequent report, i.e. five years. Each section within this draft report considers what changes may take place to the populations care and support needs and market stability up until 2027, and projects the sufficiency of the care and support market to meet the populations needs.
- 3.2 Integration:** In respect of the MSR, Well-being Assessments were conducted in both Cardiff and the Vale of Glamorgan Local Authorities concurrent to the Population Needs Assessment. Regular meetings were held between lead authors to promote cohesion between the assessments. The final Population Needs Assessment and the Well-being Assessments provided the citizen engagement and intelligence which have informed the care and support needs reflected in the Market Stability Report. Additional engagement with external and internal stakeholders has taken place to inform our local priorities for 2025 and beyond.
- 3.3 Involvement:** consultation is not formally required under the Social Services and Well-being (Wales) Act 2014; however, the Code of Practice stipulates that the Market Stability Report should reflect the findings of the Population Needs Assessment. The need for citizen engagement was emphasised in the Population Needs Assessment Supplementary Guidance issued in March 2021. To involve others in the development of *our local priorities* the following approach was undertaken:
- Engagement with residents in care homes and receiving care at home via commissioning quality officers
  - Engagement with key officers
  - Internal discussions with partners
  - External discussions with partners
  - Discussions with providers through forums.



- 3.4 Collaboration:** the market stability and sufficiency assessments, which fed into the Market Stability Report were conducted as a partnership between the Local Authorities of Cardiff and the Vale of Glamorgan, Cardiff and Vale University Health Board, the Regional Partnership Board, providers of commissioned services, and third sector representatives. The work undertaken to develop the local priorities has continued with this approach.
- 3.5 Prevention:** The recent population needs assessment process identified many gaps relating to non-regulated services where there is a link between the gaps and increased need for regulated services. If these services were in place and effective, more people would be able to live their lives without needing support from the regulated services in the scope of this MSR. Gaps in prevention services continue to be identified and considered.
- 3.6 Well-being Objectives:** The MSR has well-being at its core. Key well-being objectives included within the assessment of market sufficiency to meet the care and support needs of citizens include the following:
- 3.7 A Healthier Wales:** the assessment of care and support needs, and the range and level of services required was conducted during development of the Population Needs Assessment (PNA). During the assessment of market sufficiency, the PNA identified where development and improvement of services to support and promote health and well-being need to take place.
- 3.8 A more equal Wales:** The Supplementary Guidance issued by Welsh Government requests the consideration for self-funders during market sufficiency analysis. This is presented within relevant sections in the MSR.
- 3.9 A Wales of vibrant culture and thriving Welsh language:** Welsh language needs identified within the Population Needs Assessment were considered within the sufficiency assessment for each regulated service.

#### **4. Climate Change and Nature Implications**

- 4.1** There are no climate change and nature implications as a direct result of this report.
- 4.1** There are climate change considerations in relation to the delivery of procured services across the market and these are considered through the procurement routes and processes. For example, packages of care are brokered on a close to home basis, e-bikes are being trialled with domiciliary care providers and engagement sessions arranged online, to reduce vehicular travel across the region.

## **5. Resources and Legal Considerations**

### **Financial**

- 5.1** As in the 2023 report the priorities in this report continue to highlight the need for additional services for babies, children, young people and adults. To meet these projected needs, there will be potential significant resource implications.
- 5.2** As the cost of delivering and providing care continues to increase our ability as a council to focus on anything other than our statutory duties will become more challenging. However, this does not prevent us from continuing to target services that prevent need from escalating. Our ability to continue to be creative and innovative to meet the unmet needs identified within this report will become more difficult. However, where possible we will continue to be transformative in our approach, whilst working to ensure that we have a balanced budget.

### **Employment**

- 5.3** Recruiting and retaining staff with the skills needed to support people with complex support needs is a significant challenge within the care and support market. Evidence of initiatives that have been undertaken by services to try and meet this challenge has been considered. In the last year significant improvements have been in recruiting and retaining staff in several social care sectors. There will be a continued need to be innovative and collaborative in this area to meet the identified workforce needs across our services and the market.

### **Legal (Including Equalities)**

- 5.4** Development and publication of the Market Stability Report is a statutory duty under Section 144B of the Social Services and Well-being (Wales) Act 2014 ('the 2014 Act'). The Act 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. These matters are set out in the Partnership Arrangements (Amendment) and Regulated Services (Market Stability Reports) (Wales) Regulations 2021.
- 5.5** 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 the seven Regional Partnership Boards (RPBs). The composition, role and functions of RPBs are explained in statutory guidance on partnership arrangements in respect of Part 9 of the 2014 Act.
- 5.6** Following initial publication, there is a requirement for an update on sufficiency and stability of the market to be submitted to Welsh Government annually. This report will help to inform Welsh Government regarding sufficiency and stability within the market for the Vale of Glamorgan. A summary of last year's report was sent to Welsh Government, the process will be replicated this year.

## **6. Background Papers**

- 6.1** Cardiff and Vale of Glamorgan Market Stability Report, available from <https://cavrpb.org/app/uploads/2023/03/Market-Stability-Report.pdf>
- 6.2** Cardiff and Vale of Glamorgan Joint Area Plan 2023-28 [online], available from [https://cavrpb.org/app/uploads/2023/08/CAVG\\_AREA\\_PLAN\\_2023\\_2028-2.pdf](https://cavrpb.org/app/uploads/2023/08/CAVG_AREA_PLAN_2023_2028-2.pdf)

Reports to Healthy Living and Social Care Scrutiny Committee: 5<sup>th</sup> December 2023;  
6<sup>th</sup> September 2022.