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Foreword



As the Portfolio Holder for Adult Social Care and Health, it gives me great pleasure to extend a warm welcome to you as we present our updated Market Position Statement for Older People Care Homes 65+ in Warwickshire.

It presents our commissioning intentions and emphasises the importance of collaboration with partners, including the Coventry and Warwickshire Integrated Commissioning Board (ICB) and public, private and voluntary sector providers in developing services that prioritise choice and independence for our citizens.

The Market Position Statement serves as a valuable resource, providing information and identifying opportunities for the market to evolve in a suitable manner while ensuring its diversity and sustainability. The Council plans to work closely with providers to explore service delivery options that meet the challenges of delivering agreed and appropriate outcomes for customers during these challenging times, marked by limited resources, complex needs, increasing demands, and shifting expectations. I hope you will find it both useful and informative.

Cllr Margaret Bell Portfolio Holder for Adult Social Care & Health

Purpose of this Market Position Statement (MPS)

This document contains information and analysis that is of benefit to both current and prospective providers of older people's care homes within Warwickshire. It summarises supply and demand in a local authority area or sub-region, and signals business opportunities within the care market in that area. It also outlines the strategic direction and future commissioning intentions.

This MPS (Market Position Statement) outlines how the older people care home market may need to develop and adapt to meet future anticipated need/demand. It also sets out the key areas for market development by identifying where there are current or anticipated service gaps.

The test of a MPS is how well it is used by the provider market. Our aspiration for the future includes an interactive web-based version of the MPS, which will enable regular updates to be made and provide the market with up-to-date information that will assist providers when shaping their business decisions.



Our Commitment

We have established a set of commitments that guide our approach to commissioning services at the same time as ensuring positive outcomes for the people of Warwickshire. These commitments reflect the council's dedication to creating a thriving community.

We will only commission services that contribute to positive outcomes for Warwickshire people.

We will commission services that support a restorative and strength-based approach.

We will work within budget to commission safe and sustainable services that meet people's needs.

We will actively consider how we meet the needs of people with protected characteristics within our commissioning activity.

We will work with providers to baseline the carbon impact of commissioned services and develop plans to reduce carbon emissions from our health and social care contracts.

Our commissioned services will be developed using a robust evidence base, including our place based Joint Strategic Needs Assessments.

We will focus on developing and strengthening relationships with internal and external partners, service providers and people that use our services.

We will utilise their extensive knowledge to coproduce solutions and to plan, commission, and review.

We will support development of the Coventry and Warwickshire Integrated Care System; taking action to maintain, progress and further develop integrated and place-based commissioning arrangements where they secure the best outcomes for our population and reduce health inequalities.

We will evaluate and review the impact of our commissioning activity on the Warwickshire population, ensuring flexibility and continuous improvement.

Adult Social Care Strategy

Our duties and responsibilities are determined by national legislation and the four important pieces of legislation which guide our work are the Care Act 2014, the Mental Capacity Act 2005, Health and Social Care Act, and the Mental Health Act 1983. Additionally, the Government has set out its plans and wide-ranging reforms for health and social care, through 'Build Back Better', 'People at the Heart of Care' and more recently 'Next steps to put People at the Heart of Care'.

We are currently in the process of writing our Adult Social Care Strategy. This document will both articulate what we are currently doing to deliver our Adult Social Care responsibilities, and areas which we need to strengthen to keep our population safe, well and independent for as long as possible. This section of our MPS will be updated Autumn 2024, once we have finalised this document by engaging with social care staff, providers and customers. Our draft document outlines our strengths and conversely where we should like to strengthen our offer. Strength-based practice has been identified as being particularly good in Warwickshire and was highlighted in our recent Peer review. This way of working builds on the established assets in people's lives, families, and communities to deliver the best outcomes for our customers.

The WCC (Warwickshire County Council) Learning and Development (L and D) team will continue to work closely with providers to support the training and development of the provider workforce. They offer training assessments to identify training needs amongst staff and work with providers to access the identified and required training. They both commission and deliver training for providers and utilise a webbased Learning and Development platform (Scils). This supports transferability of training, reduces re-training and concentrates on personal development needs.

Our Residential Care providers have made great advances in the use of technology to support customers maintain their independence and we want to learn from and share this across our market. We will continue to work with partners and providers to consider how assistive technology and digital solutions can support the efficiency of adult social care delivery.

Partnership working both with other statutory bodies and within WCC between Adult Social Care and Social Care and Health Commissioning is strong.

We have an integrated Adult Mental Health service with the NHS that results in a joined-up service provision to our customers with Mental Health Needs.

Areas for Development

We have started work on improving our information offer and digital interface and we will be looking regionally and nationally at authorities who do this well. If potential customers, friends and relatives can access the information they need easily and can also self-serve to understand what is available to meet their needs, then they might access non statutory community resources to help themselves. This will help people stay well and independent for longer.

We will continue to explore the role technology can play in supporting customers to remain independent or obtain independence and take advantage of opportunities arising from the rapid advancements in technology.

During Covid and since its decline we have seen an increase in sustained care post hospital discharge, as such we are developing short term recovery and reablement support, both bedded and within the community, to help people to reduce their long-term needs for care and support.

We will continue to work closely with Housing Authorities in the county to progress the development of Housing with Care schemes to create good quality, affordable housing options as alternatives We will seek to encourage the development of a diverse market and promote opportunities for providers in the third sector, particularly social and microenterprises that can develop and offer alternatives to traditional support services. We will also look at ways of maximising community-based services and the voluntary sector to deliver services that support, and compliment commissioned services.

In line with Warwickshire's Health and Wellbeing Strategy, we will take a Health in All Policies approach to make health everyone's business, in particular helping people to improve their mental health and wellbeing and reducing inequalities in health outcomes and the wider determinants of health. It is recognised that all staff and services have a role to play in supporting good health and wellbeing. A Making Every Contact Count (MECC) approach is being rolled out across the Council and commissioned partners to deliver key messages and signposting to health and wellbeing support.

A Healthy Ageing Joint Strategic Needs Analysis (JSNA) has now been published which will outline the priorities for preventing ill health in later life.

Commissioning Intentions

- We will continue to work towards appropriate policies and strategies to address the needs of the population aged 65 and over in Warwickshire, including provisions for healthcare, social care, and housing, to ensure that they can continue to live fulfilling lives as they age.
- 2. While there is strong market growth in Warwickshire, new homes typically provide services with prices at the upper end of the market. We would welcome approaches from providers who can offer rates that support the council to manage its budgets within available resources. We would also like to explore opportunities for joint capital projects which would also create capacity for services that are more affordable for social care funded customers.
- **3.** We are committed to supporting the care market in working more digitally and adopting technologies to improve the quality and safety of care for their residents.
- **4.** When supporting people or giving advice, we will ensure assistive technology is always considered, especially where it can improve hydration; reduce medication errors; reduce falls; support those with learning disabilities; support those with dementia; and support carers. We will continue to support care providers to maximise their use of assistive technology to ensure the quality of care and safety for customers.
- 5. We are committed to working in partnership with colleagues in the ICB to promote and develop Enhanced Health in Care Homes (EHCH) schemes and initiatives that benefit care homes. To date initiatives have included: Red Bags scheme; NHS Data Security and nhs.net emails; Digital Transformation Fund; NECSU Capacity Tracker; Remote Monitoring; and Assistive Technology. This includes promoting and supporting the rollout of digital monitoring tools, adopting digital social care records (DSCR), sensor-based falls prevention and detection technologies, and other technologies based on local need and what works for providers. Where possible, Warwickshire will also support providers with access to relevant funding and training and support to make the best use of these technologies.

- 6. We are committed to acting decisively to tackle climate change and the biodiversity crisis. Acting now, so that we are a County with a sustainable future, is one of the key strategic priorities in the Council Plan. We have already started work towards our goals of reducing carbon emissions to net zero across the Council by 2030 and to support us as a County to do the same by 2050 or earlier. We will be working with care home providers to assess and reduce the environmental impact of care homes, with a view to agreeing a protocol/ambition which would then form part of our contracts from September 2026.
- 7. We will commission to meet service gaps in areas where there is escalating demand or a lack of supply. We are committed to collaborating with providers to assess the level of demand and formulate responsive strategies to bridge these gaps both in the medium and long term, by assessing the total available provision and its distribution across the county:
 - Dementia With the rising number of individuals living with dementia, the need for quality dementia care is essential. It is crucial to provide specialised dementia beds, especially for those facing greater challenges along with focusing on public awareness, ensuring timely diagnosis and enhancing care access and support for affected individuals and their families.
 - Complex needs where there is limited availability of care home options in the county to support residents with more complex needs, such as those requiring Section 117 Mental Health aftercare or intensive dementia care.
 - In County Our goal is to ensure that all residents can access quality care within our county, eliminating the need to place individuals outside of our community.
- 8. We will continue to seek opportunities to commission care home beds on block contracts. Block contracts can be an appropriate way of sharing risk and getting best value from available public funding. They create secure and predictable funding for providers and certain levels of supply at agreed rates for the commissioner. We will be approaching the market with the ICB to explore how block contracting of care and nursing home beds could be expanded and would be interested to hear providers' views on this approach.

- 9. We will continue to support the local health and care system to maximise hospital bed capacity, by carrying out assessments in 'discharge to assess' beds out of hospital or in other community settings. This will enable patients to move out of the hospital into short term recovery environment where they can be supported with therapy and reablement services and help them and reduce their long-term needs for care and support.
- **10.** We will continue to work with providers to improve health and wellbeing and prevent ill health for older people, building on the recommendations in the Warwickshire Healthy Ageing JSNA. Conditions that most impact on health in later life for Warwickshire residents include cancer. Ischaemic heart disease and dementia; back pain, hearing loss, diabetes, falls and chronic obstructive pulmonary disease (COPD).

Resources

Adult Social Care Spending on Direct Care

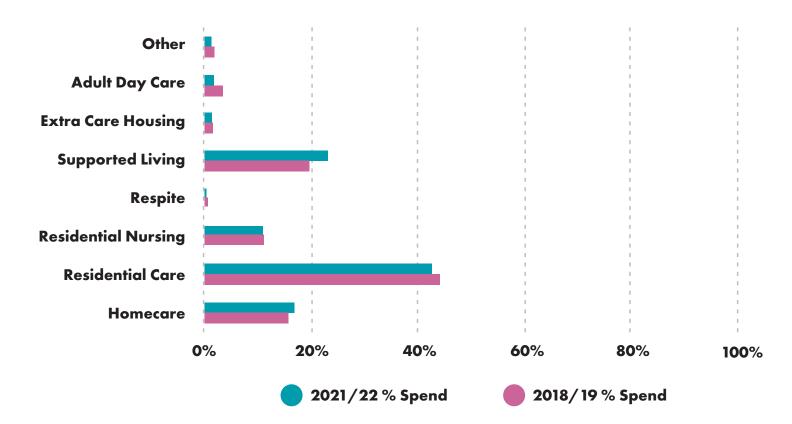
This section specifically examines Adult Social Care expenditure for packages of care. It excludes expenses related to staffing or any other areas and does not incorporate income, including contributions made by eligible clients towards their care costs. This approach is designed to facilitate comparisons with other Market Position Statements.

TThe expenditure for adult social care services below increased from £126m in 2018/19 to £155m in 2021/22, representing a £29m increase and a 23% growth in gross expenditure. Among the various types of care, Residential Care accounted for the largest proportion of this spend, representing 44% of this expenditure in 2018/19 and 43% in 2021/22. When this is broken down further to Older People Residential Care accounted for 24% of the total spend in 2021/22.

Residential Nursing Care accounted for 11% of the spend during 2018/19 and 2021/22 and again of this Older People Residential Nursing Care accounted for 8% of the spend in 2021/22.

We have several statutory responsibilities, including setting a balanced budget. We recognise the need to remain within budget, but also to help maintain the quality, sustainability, and accessibility of adult social care services in Warwickshire.

Adult Social Care Percentage Spend on Commissioned Services



Workforce

The staffing vacancies across all job roles in care homes, including nursing homes, in Warwickshire was 11.3% in December 2022. This increase is in line with the national vacancy rate, which stood at 10.9% in 2021/22.

Furthermore, the staff turnover rate in the sector is high, standing at 40.7%, with 48% of those leaving their job but staying in the sector and moving to another organisation. The average sickness rate for staff across care homes in Warwickshire is 10.6 days per year, which is higher than the national average of 8.4 days per year. Additionally, the workforce in the sector is predominantly female, with males making up 15% compared to 17% nationally. The average age of a person working in the sector in Warwickshire is 43 years old, compared to the national average of 44 years old.

Recruitment remains a persistent challenge within the sector. The allure of higher-paying jobs in other sectors, such as health services and large retailers/ supermarkets, makes it difficult to attract and retain skilled workers. To overcome this obstacle, it is important to focus on enhancing the offer to prospective care workers and WCC would want to join with providers and the NHS ICB in systemwide initiatives that promote the rewards of working in the care industry, such as making a positive impact on people's lives.

Warwickshire and its Population

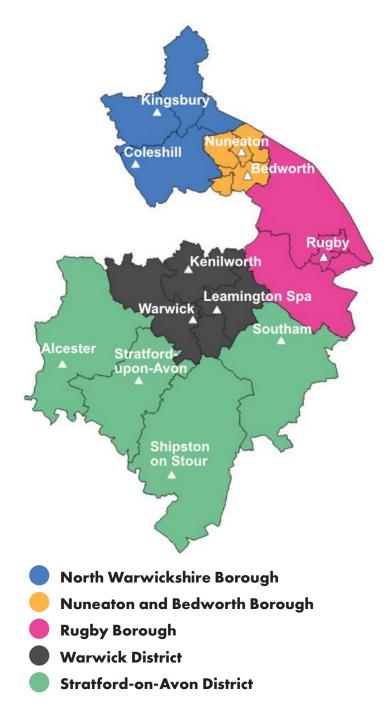
The county of Warwickshire is located in the West Midlands region. According to mid-2021 population figures published by the Office for National Statistics (ONS), the population of Warwickshire was 599,153. Based on recent growth rates, ONS estimates that the current population in 2023 has risen to around 623,000.

Warwickshire is at the heart of Britain's transport network and several key strategic routes pass through the county. Warwickshire currently has a two-tier Local Authority system in place with an upper-tier County Council and five lower-tier district and borough councils as follows:

- North Warwickshire
- Nuneaton and Bedworth
- Rugby
- Warwick
- Stratford-on-Avon

The population of Warwickshire is diverse, with a mix of urban and rural areas. In terms of demographics, the largest age group is those aged 45-64, followed by those aged 65 and over. There is a relatively low percentage of young people under the age of 16, which suggests that the population is ageing. The population is predominantly White British, with ethnic minorities making up a smaller proportion of the population.

It is estimated that the population in Warwickshire will continue to grow over the coming years. The current projected growth rate suggests that the population of Warwickshire will reach around 677,000 by 2041.



Population aged 65 and over, projections to 2040, in Warwickshire.

	2020	2025	2030	2035	2040
Population aged 65 and over, projected to 2040	122,000	131,900	145,500	157,600	165,500
People aged 65 and over predicted to have dementia by age and gender, projected to 2040, in Warwickshire	8,760	9,907	11,227	12,549	13,721

Source: Projecting Older People Population Information System (POPPI)

According to the latest data, the population aged 65 and over in Warwickshire is estimated to be around 145,50 in 2030. In terms of future projections, it is expected that the population aged 65 and over in Warwickshire will continue to grow, with estimates suggesting that by 2035 it will reach approximately 157,600, an increase of over 29% from the 2020 figure.

The number of people living with dementia in Warwickshire is expected to increase in the coming years, due to a combination of factors such as an ageing population and increasing awareness and diagnosis of the disease. According to the Alzheimer's Society, there were approximately 8,760 people living with dementia in Warwickshire in 2020. This number is expected to rise to around 11,227 by 2030, and to almost 13,721 by 2040, based on current trends.

Warwickshire's overall health outcomes are above the national average; however, these outcomes vary among its residents. In more deprived regions, individuals experience shorter lifespans and spend a substantial portion of their lives in poor health. Contrarily, in less deprived areas of the county, males anticipate living over nine years longer, while females expect to live five years longer than their counterparts in the more deprived regions. Notably, people are facing an extended duration of poor health in their extended lives, with men enduring 17.6 years and women 19.3 years in suboptimal health. These discrepancies in health outcomes are avoidable and closely tied to living and work conditions, alongside lifestyle choices encompassing smoking, alcohol consumption, nutrition, and physical activity.

In the year 2021, the leading causes of death for individuals aged 65 and above in Warwickshire were cancer, followed by ischaemic heart disease among men, and dementia and Alzheimer's disease among women. COVID-19 claimed the third position for both sexes. Importantly, many of these conditions offer opportunities for prevention and early intervention.

While numerous individuals continue to enjoy a healthy, active, and independent lifestyle in their later years, some face an escalating risk of frailty, longterm medical conditions, dementia, terminal illnesses, dependency, and disability, including falls, as they age. Furthermore, individuals from certain ethnic minority groups and lower socio-economic backgrounds are more likely to experience inequalities in aging well.

Diversity

	WARWICKSHIRE	WEST MIDLANDS	ASC 2022/23 SERVICE USERS	ASC 2022/23 SERVICE USERS (REMOVING UNDECLARED)
Asian, Asian British or Asian Welsh (%)	6.3	13.3	3.0	3.3
Black, Black British, Black Welsh, Caribbean or African (%)	1.3	4.5	0.6	0.7
Mixed or Multiple ethnic groups (%)	2.3	3	0.5	0.5
White (%)	89.1	77	85.5	94.9
Other ethnic group (%) Undeclared (%)	1.0	2.1	0.5 9.9	0.5

Source: ONS, Census 2021

Warwickshire is less diverse than the West Midlands region and England as a whole. The majority of the population in Warwickshire identifies as White, accounting for 89.1% of the population.

Our care records systems show that our older people care home population appears to have a different ethnic composition compared with the wider UK population. However, the ethnicity of 10% of our residents in care homes is undeclared. Because of this, work needs to be undertaken in this area to understand more accurately what the real diversity of care is in Warwickshire, and we will seek to work with providers to help ensure the care provided meets the specific needs of the wider community. For additional information please use the links provided. <u>Warwickshire Insights</u>

Older People Population Information System (POPPI) Oxford Brookes University Institute of Public Health (other data sources are available <u>POPPI</u>

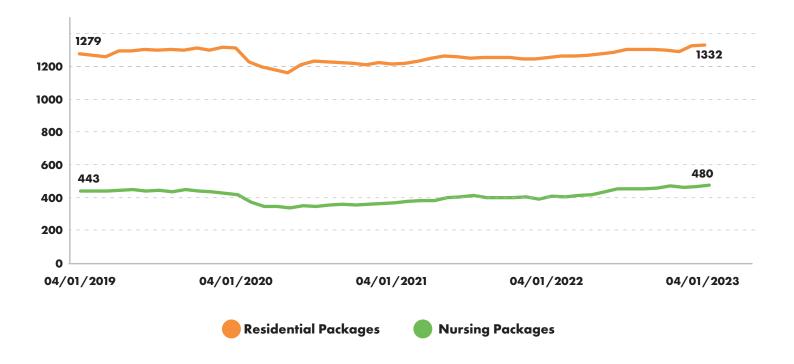
Current Capacity, and Forecasted Demand

As the population of Warwickshire continues to age, the demand for care homes for those aged 65 and over is expected to increase in the coming years. However, forecasting this demand accurately is a complex and challenging task. This is due to a range of factors, including demographic changes, evolving health needs, and economic conditions. This complexity means that it is difficult to predict demand or precisely how much of any service might be needed in any given location.

While we have seen fluctuations in both our residential and nursing care bed occupancy over the period from April 2019 to April 2023, there is an overall increasing trend in the latter months. These findings suggest a growing demand for care services and emphasise the importance of adequate resources and planning to meet the evolving needs of older adults requiring residential and nursing care.

Our, out of county residential beds account for 6% of existing WCC clients and nursing beds account for 13% of existing clients. The predominate reason for these out of county beds is service user choice, often to live closer to relatives.

Number of Unique Persons Receiving WCC Funded Packages



Care Home Provision in Warwickshire

Across the county, three care homes were rated by CQC (Care Quality Commission) as "Outstanding," while the majority of locations across all districts/boroughs were rated "Good." Nuneaton & Bedworth had the highest number of locations rated "Requires Improvement" with five residential homes and three nursing homes.

Alongside our commitment to quality, our Commissioning and Quality Assurance teams continue to collaborate closely with residential care providers through ongoing communication, visits and access to training to support providers to improve quality of their services. We will continue to work closely with our Social Care Providers to drive quality improvement through our 'See, Hear and Act' approach through which we gather and triangulate intelligence from multiple sources to identify any quality themes or concerns. Where concerns are identified we undertake quality assurance activity to understand these in more detail and this could include a visit to the provider to validate the intelligence.

Where necessary support improvements through Service Improvement Plans (SIP). Significant concerns are escalated to Service Escalation Panel (SEP) where remedial actions are discussed, agreed and monitored. Remedial actions could include restrictions on admissions to the service until sufficient improvements have been evidenced and sustained. This could be a Voluntary Placement Stop (VPS) where the provider agrees to restrictions on admissions and enables them to have the resources to implement improvements as identified in the SIP.

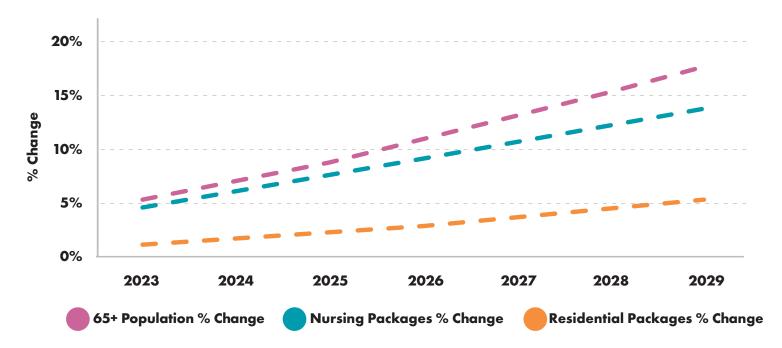
This collaborative approach benefits the service users whilst building supportive partnership with the providers.

	RESIDENTIAL CARE 65+						NURSING CARE 65+					
DISTRICT / BOROUGH	NORTH WARWICKSHIRE	NUNEATON & BEDWORTH	RUGBY	WARWICK	STRATFORD	TOTALS	NORTH WARWICKSHIRE	NUNEATON & BEDWORTH	RUGBY	WARWICK	STRATFORD	TOTALS
Number of locations	9	11	17	13	14	64	6	5	7	10	15	43
Number of CQC Registered Beds	324	491	583	602	611	2611	396	240	406	585	816	2443
CQC rated 'Outstanding'	0	0	1	0	1	2	0	0	0	0	1	1
CQC rated 'Good'	7	6	9	11	11	44	6	2	6	9	12	35
CQC rated 'Requirements Improvement'	2	5	5	2	1	15	2	3	1	0	2	8
CQC rated 'Inadequate'	0	0	1	0	1	2	0	0	0	0	0	0
CQC not yet rated	0	0	1	0	0	1	1	0	0	1	0	2

Source - Care Quality Commission, Care Directory with filters - June 2023

The projected data from 2023 to 2029 reveals differing rates of increase between the number of WCC residential and nursing care packages and the over-65 population. During this period, the 65+ population is anticipated to expand by 13%. In contrast, Warwickshire's residential care packages are expected to grow by 4%, while nursing care packages are projected to increase by 9%. These projections indicate that the growth in the number of individuals receiving support from WCC to transition to care homes is not aligning with the overall population growth. Instead, current trends indicate varying demands for residential and nursing beds.

The challenges posed by the COVID-19 pandemic has further complicated our ability to predict future trends. Significant drops in occupancy levels during the pandemic, followed by increased demand in recent times, have made forecasting more complex. Consequently, we remain committed to collecting regional and national data and collaborating with providers to gain insights into demand trends. This collaborative effort will help us determine the appropriate level of investment and development needed for our market.



Warwickshire Population and Placement Trends (Base year = 2020)

Changes in Warwickshire Older People Care Home Market January 2017- December 2023

Warwickshire has seen an increase in overall capacity in the past few years. CQC registrations of new and closing homes in Warwickshire for Older People during the period 2017-23 (excluding re-registrations) indicate that the market is growing. There has however, been a significant increase in nursing beds in Warwickshire compared to residential beds which have seen an overall reduction of 162 beds compared to an increase of 501 new nursing beds. The biggest increases in nursing beds can be seen in Stratford, Warwick and Nuneaton & Bedworth. Overall, Warwickshire has seen a net increase of 339 beds with 746 new beds and 407 closed beds.

		TOTAL		NURSING ONLY			
DISTRICT & BOROUGH	NUMBER OF NEW BEDS	NUMBER OF CLOSED BEDS	CHANGE	NUMBER OF NEW BEDS	NUMBER OF CLOSED BEDS	CHANGE	
North Warwickshire	91	89	2	91	89	2	
Stratford	284	49	235	218	14	204	
Nuneaton & Bedworth	107	185	-78	107	0	107	
Warwick	152	84	68	152	0	152	
Rugby	112	0	112	36	0	36	
Warwickshire	746	407	339	604	103	501	

Source: CQC database as of 1 December 2023

Understanding demand - location and need

Although the average number of available beds may suggest an adequate supply to meet our demands, the current situation regarding supply and demand varies significantly across the county. This disparity encompasses both bed capacity and pricing. When comparing data on bed vacancies with demand and the local population's size, it becomes evident that in areas such as North Warwickshire and Nuneaton and Bedworth, the supply is notably less compared to other parts of the county, for both nursing and residential care services.

While it's positive that providers are investing in Warwickshire, with several new care and nursing homes established, these facilities tend to target the higher end of the market in terms of fee rates. Self-funders in older people's care homes adds complexity to the challenges of forecasting future demand for services faced by local authorities. These individuals privately pay for their care instead of relying on government-funded support and the challenge arises from factors including a lack of reporting. This complexity can significantly impact our ability to predict future demand accurately and ensure that Warwickshire's care market possesses the necessary capacity.

To address this, we are committed to fostering collaboration with care providers. Through close cooperation, we aim to enhance our understanding of the self-funder population within our region and work with providers to shape the market to meet needs.



Source - Care Quality Commission, Care Directory with filters – June 2023

Summary

The Market Position Statement provides an overview of our approach to market development, our commitment to achieving positive outcomes, strategic intentions, and the financial context within which we operate. Collaboration, sustainability, and innovation are underscored as crucial elements in the provision of care services in Warwickshire.

Moving forward, we will continue working closely with our Health and Social Care partners to integrate services and ensure the delivery of high-quality care and support in the most suitable settings, with a focus on minimising hospital admissions. Technological advancements and innovation will be leveraged to transform commissioned services, enabling service users to receive personalised care. This involves ongoing development of digital platforms and the utilisation of Assistive Technology (AT) to promote independent living.

Furthermore, we recognise the importance of our voluntary and community sector partners in addressing social care challenges and meeting the diverse needs of communities. We will actively collaborate with these organisations, fostering innovation and seeking to strengthen partnerships to enhance the well-being of citizens in the years to come.

We are seeking opportunities to work with providers on developments that would provide a wider range of pricing within new homes and that would increase the number of options for people with Section 117 Mental Health aftercare or Dementia needs. We would therefore very much welcome discussions with interested providers.

Useful Contact Details

If you would like to be alerted when tendering opportunities arise at Warwickshire County Council, we would encourage you to register your organisation with <u>CSW-JETS</u> which is the electronic procurement portal used by Warwickshire County Council and other local Councils to advertise tendering opportunities.

If you would like to enquire about opportunities to open or consider new services in Warwickshire, please email: <u>marketmanagement@warwickshire.gov.uk</u>

Warwickshire Climate Emergency Warwickshire Climate Emergency – <u>Warwickshire Climate Emergency</u>

Social Care Information and Learning Services is an online learning resource/community dedicated to the Health and Social Care Sector. <u>Social Care</u> <u>Information & Learning Services (SCILS)</u>