MARKET STABILITY REPORT (2022)

Executive Summary

version 1.0

Contents

1.0 Introduction

Section 144B of the Social Services and Well-being (Wales) Act 2014 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 as set out in the Partnership Arrangements (Amendment) and Regulated Services (Market Stability Reports) (Wales) Regulations 2021.

The Regulations also amend the Partnership Arrangements (Wales) Regulations 2015 so that 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 Regional Partnership Boards (RPBs).

The Regulations require local authorities to produce market stability reports every five years, with the first reports published by **1 June 2022**. The reports will help inform and shape the next five-year area plan, along with the 2022 Cwm Taf Morgannwg (CTM) population needs assessment.

In preparation for undertaking this report, local authorities carried out, in partnership with the Local Health Board and other RPB partners, an assessment of both:

- Sufficiency - an assessment of the sufficiency of care and support in meeting the needs and demand for social care as set out in the population needs assessment. and
- Stability - an assessment of the stability of the market for regulated services providing care and support.

2.0 Sufficiency assessment: Part A

Part A of this report provides a summary of the gaps and issues that have been identified when assessing the sufficiency of care and support services across Cwm Taf Morgannwg. The information is informed by the Population Needs Assessment and is presented across the prescribed priority groups for adults and older people and children and young people.

The summary highlights some of the key messages from the sufficiency assessment for each of the priority groups: -

Adults and older people

- The expected increase in older people is going to have a considerable effect on individuals, their communities and the services that provide care and support for them.
- Increased focus on delivering care and support within our communities could provide much needed capacity and reduce current national pressures on statutory services.
- With the data suggesting there are going to be more people living with dementia, chronic conditions and co-morbidities, the services that support them will have to adapt to the changes in demand.
- The national shortage of staff to deliver key social care and health services is having a significant impact on the capacity to meet growing domiciliary and residential care, which has seen an increase in demand during the pandemic.

Children and young people

- The pandemic has had a significant negative impact the mental health and wellbeing of children and young people, this is evident through the increased demand for specialist services across the region.
- The need for more social opportunities for children with additional needs was raised as a gap during the engagement activities, with parents stating there was limited places to take their children where they would be safe.
- Between 2016-2019 the number of young people presenting as homeless and needing to access the local authority's final duty to secure accommodation increased sharply.
- The number of children looked after across CTM increased by 8.23% between March 2018 and March 2020, compared to a 12% increase across Wales.

Health and physical disabilities

- The reduction in services during the pandemic has seen a disproportionate negative impact for people with health and physical disabilities.
- All local authorities across the region recorded a significant increase in the number of falls requiring an ambulance, between 2018/19 and 2020/21 this increased by over 80%, with over 50% aged 80+.
- A lack of early intervention and preventative services (adults and children), based within communities, was highlighted as a gap that could prevent the escalation of need and the requirement of higher end/specialist services.

Learning disabilities and autism

- The lack of opportunities to engage in services within their communities was raised as a major gap in provision for people with a learning disability.
- The number of adults (18+) with autism is expected to increase slightly over the next 20 years (6%)
- An increase in mental health concerns for people with a learning disability and autism was highlighted during engagement with families and services.
- A lack of specialist mental health support for people with a learning disability or autism has resulted in many not receiving the support they require.
- Waiting times to access services, specifically in relation to a diagnosis of autism was one of the main concerns identified by the PNA.

Sensory loss

- With the ageing population we are likely to see an increase in the number of people with sensory loss over future years, increasing the demand for specialist support services as well as sensory friendly local provision.
- There has been a long-term lack of opportunities for people with sensory loss to engage with local community, reducing opportunities to make friends.
- A major service gap highlighted during the engagement activities was the lack of information available in appropriate formats, especially receiving information using British Sign Language

Mental health

- Children and young people, especially those with previous mental health issues, has further deteriorated during the pandemic.
- People are reporting gaps in services to support mental health across the spectrum.
- Research suggests that more people are now using substances and alcohol as a coping mechanism.
- The pandemic has had a significant impact on the ability to provide mental health support, which has subsequently increased the waiting times for children's and adult's services.
- A survey undertaken by Mind Cymru about the consequences the pandemic has had on mental health found that young people were most likely to be using negative coping mechanisms to deal with mental health issues.

Unpaid carers

- The predicated number of people providing unpaid care across Wales over the next 10 years is expected to increase by almost 5%.
- During the pandemic, young carers and young adult carers mental health has worsened, they are more worried about the future, more stressed, less connected, and their caring hours have increased.
- Services supporting carers are reporting a significant increase in the numbers accessing their services that are close to crisis point
- A consistent message highlighted by carers has been the difficulty in accessing the relevant information when they need it with many reporting that they are not aware of the services or support available to them.

Violence against women, domestic abuse & sexual violence

- Reports to children's services due to domestic violence increased during the pandemic, which is reflected across the region as the highest child protection re-registration rate.
- Nationally there was an increase in demand for victim support services, including a 65% increase in calls and contacts logged by the National Domestic Abuse Helpline between April and June 2020, compared with the first three months of the year.
- A lack of access to alternative, early intervention or preventative services was reported by both victims of domestic abuse and those provide the specialist support.
- A lack of support for marginalised communities was raised by a number of people during the engagement activities.

Secure estate

- Under 4% of people with no identified ACEs had been incarcerated, yet this rose to 38.5% of those with four or more ACEs.
- A review looking at the impact of covid on prisoners concluded that the cumulative effect of the pandemic on prisoners' well-being and rehabilitation was likely to be significant and far-reaching.

Dementia

- The number of people living with dementia across Cwm Taf Morgannwg is expected to increase by 62% by 2040.
- The increase in the number of people with dementia is going to increase the complexity of the populations needs and have a significant impact on the services required to support them.
- Research indicates that people with dementia have been disproportionately affected by the pandemic, with the Office for National Statistics (2020) stating 49% of COVID-19 deaths in care homes and 25.6% of all COVID-19 deaths were people with dementia.

3.0   Stability assessment: Part B

Part B of this report provides an assessment of the stability of the market for regulated services providing care and support and the sufficiency to meet existing and projected demand.

The information contained within this section summarises the key messages from the market stability report for each of the regulated services as detailed in the Schedule to the 2016 Act.

Care homes (Adults and older people)

Key messages

- All three local authorities are below the national average for care homes with nursing, which suggests a squeeze on supply and availability across the region.
- Difficulties highlighted in being able to find suitable placements in a timely manner and to match supply to changes in demand.

- At least half of all providers (49%) have occupancy of less than 85%, which is the level defined by Care Forum Wales as being "non-sustainable".
- Current provision unable to meet the increasing need for respite care, particularly dementia care.
- Respite care for individuals with learning disabilities with older parents has also been identified as a particular problem.
- Where regional provision is unable to meet the needs of an individual, specialist complex provision may be identified out of county.
- There is no longer the capacity to deal with all patients discharged from hospital who may benefit from community support due to extreme pressure on community care.
- Resulting in people staying in hospital longer than necessary or become permanent in residential care.
- Fall in demand for general residential care as people are entering residential care with more complex needs and at a more advanced stage in their mental and/or physical health condition.
- At the provider level, finance is critical to the viability of individual (independent) care homes, their ability to invest in maintaining and improving homes and reconfiguring to meet the changing demand.
- A significant area of concern is the availability of Adult with Nursing Placements for those individuals who require specialist EMI nursing.
- Staff recruitment and retention of nurses and care workers is a challenge for many homes, particularly local authority-owned homes, reducing the regions capacity.

Recommendations

1. Development of a consistent dataset covering the three local authorities.
2. Develop and implement a consistent regional approach to measure the quality of the care homes.

3. Enhance partnership working with providers.
4. Action should be taken to remedy the under-utilisation of capacity in local-authority-owned homes.
5. Increase the following types of provision:

> (i) Short-term/respite beds and/or respite unit(s).
>
> (ii) Step-down care, facilitating recovery and assessment of needs outside the hospital environment.
>
> (iii) Nursing and EMI nursing beds.

Adults placement ('Shared lives') scheme

Key messages

- Each council have separate arrangements in place for the management of long-term and short-term placements, with local authorities reporting that provision is not sufficient to meet current and projected demand.
- The matching process between families and individuals needing support is complex and often lengthy, resulting in lengthy delays.
- The services delivered are adequate though increasing demand and a lack of choice negatively impacts the overall quality.
- These services have delivered annual savings and demonstrated positive outcomes for service users.
- The pandemic has resulted in issues for developing the service further, impacting on service capacity, low interest in new families to the scheme and client group scope.
- There is a lack of capacity for family placements, issues with matching individuals to families and long processing and waiting times.

Recommendations

1. Local Shared Lives Schemes have provided excellent outcomes previously and provide a worthwhile service for young people across Cwm Taf Morgannwg.
2. Additional investment should be considered, if necessary, to overcome any delays caused by the pandemic.
3. Transition to adulthood.

Advocacy services (children)

Key messages

- Concerns about the availability and consistency of advocacy for children led to the introduction of a national approach to statutory advocacy services in 2017.
- Tros Gynnal Plant (TGP), providing service across the three local authority areas.
- The quality of advocacy services provided to children and young people is of sufficient quality.
- The move to online and digital communications was embraced by both provider and many clients in receipt of service.
- Issue-Based Advocacy continues to be provided and has a high level of demand.
- Reported increases in demand for Advocacy for parent carers involved in child protection cases, and advocacy work undertaken within Parc Prison secure estate.

Recommendations

1. Increase the capacity of advocacy across the Cwm Taf Morgannwg region with a greater emphasis on co-producing and improving the opportunities for the voices of users to be heard.

Advocacy services (adults)

Key messages

- There is a growing demand for advocacy support services for adults and older people.
- Statutory (Regulated) Advocacy sits alongside, and is complementary to, non-statutory advocacy services. All commissioned providers deliver both statutory and non-statutory advocacy.
- There is suitable support available for eligible clients, the quality varies across the region from good to adequate, with the quality of the service adversely impacted by delays in response time.
- The restrictions introduced nationally due to the Coronavirus has had an impact in the number of people accessing the service.
- Organisations providing advocacy rely on a small group of trained advocates making the services fragile. Without increased capacity and client group scope this will remain an area of concern.

Recommendations

1. There is room for further development on the Active Offer – work is underway in this area on a regional and local level to increase the number of active offers.
2. A gap has been identified for advocacy for parents, which is non-statutory.

Care homes (children and young people)

Key messages

- All local authorities across the Cwm Taf Morgannwg region have seen an increase over the past 4 years in residential care, but over the past 2 years RCT has started to see a decline.
- There has been a slight increase in vacancies across the sector, though vacancies remain very limited and lower within Cwm Taf Morgannwg than other regions across Wales.
- Consensus that the placements market is not providing sufficient appropriate places to fully meet children's needs at the point of need.
- To identify appropriate accommodation children and young people are often placed out of county or even country.
- Growing pressure on residential spend with increase in external providers and out of county placements.
- Gaps in provision identified include insufficient therapy services, inability to support sibling groups etc.. that could have a detrimental impact on the well-being of the child.
- Placement decision making appears to be heavily impacted by available supply as opposed to needs driven.
- The Welsh Government have published 'Removing Profit from the care of looked after children' Programme Board policy statement and affirmed commitment adding that plans to be in place to transition to not-for-profit foster and residential care in Wales'.
- Removing profit from children's residential sector may disincentivise providers to enter this market place and further exacerbate the lack of sufficient capacity within the current market.
- Require greater scope to develop more regional provision, including a focus on higher need groups, Family group, long terms, short break and emergency bed and family safeguarding, specialist fostering.
- Recruitment and retention are a challenge shared across social care and applies to both in-house and independent provision.

- A number of challenges identified in the PNA include increase support for mental health and domestic abuse impacting on support services.
- Capacity issues in fostering are placing a strain on residential services, resulting in a shortage of beds.

Recommendations

1. Increase the supply of registered Children's Homes for children, especially services with the ability to meet the needs of children with complex needs.
2. Actions required to address the lack of integrated approach to residential care.
3. Reduce the delays for safe accommodation.
4. Workforce development need for skilled staff available to support young people in crisis.
5. Action required to increase the supply of local authority foster carers.
6. Address the insufficient supply of not for profit.
7. IFA placements particularly for children whose earlier experiences mean they need more skilful care (particularly 8+ yrs).

Secure accommodation services

Key messages

- Hillside Secure Children's Home in Neath is the only facility currently in Wales. The unit has capacity of 22 places shared between the Youth Justice Board (linked to offending), and Welsh local authorities for welfare purposes.
- Due to the few secure units (also few in England), they are used nationally, resulting in difficulties in securing a place.

- There is a national shortage (England and Wales) of secure placement, often leading to Local Authorities having to care for young people in settings that are not secure placements, despite them being assessed as meeting the threshold for secure provision.
- Secure accommodation is costly ,difficult to provide and recruiting and retaining skilled staff willing to work in a challenging environment is difficult.
- Placements are often out of area and can be prohibitive to be able to support a rehab back to family/residential/foster placement.

Recommendations

1. Secure accommodation needs to be developed on a national level however new regional accommodation developments will help to meet lower-level needs.

Adoption services

Key messages

- CTM spans the footprint of 2 regional adoption collaborations.
- In general, children who are adopted achieve positive outcomes but the adoption process, from assessment, through matching and then placing children is often lengthy.
- There has been a slow decrease in the number of children being made subject of a placement order with an agreed plan of adoption.
- Children coming through with an agreed plan of adoption have increasingly complex needs, the main issues include exposure to significant drug and alcohol use during pregnancy, genetic conditions and disability issues as a result of non-accidental injury.

- There is insufficient adoption support for adopters who have more complex needs, exacerbated by up to 3 year waiting lists for ND assessment.
- There is a continuing need to identify and support suitable adoptive families for small children for whom it is not safe form them to grow up with a foster carer or relative
- Demand for adoption has now stabilised following a decrease in children requiring adoptive placements and emphasis placed upon preventative measures to enable children to remain at home.
- The primary concern continues to be the recruiting of adoptive families and establishing a sufficient selection ensuring choice when matching.

Recommendations

1. Increase the availability of psychology
2. Action required to reduce the waiting list for neuro developmental services.
3. Introduction of an integrated therapeutic adoption support services (MAPPS is LA only).
4. Consider the development of a specialist support provision to provide bespoked support to learners in schools.
5. Increase the use of TESSA for adoptive families with greater needs.
6. Development of sensory OT interventions as identified as a service gap by TESSA.

Residential family centres

Key messages

- There are only two registered residential family centres in the whole of Wales, one of which recently reopened after a closure. One of those centres is at Crossroads (Ty Seren) in Bridgend.

- Placements in residential family centres are less preferred, with parent and child foster placements seen as a better option as they can provide an assessment in a more 'natural setting'.
- This shift in preference is evident through the relatively low numbers placed from each of the local authorities in the region.
- Although numbers are low, placements are often out of area, making it difficult to step down back into the community, and impacting contact with family, siblings etc.
- Spot purchasing occasional places avoids committing resources to provision that may not be needed. However, it does mean that costs are likely to be high and placements likely to be distant.

Recommendations

1. Insufficient need for residential family placements makes it difficult to justify commissioning a dedicated local centre.
2. Increasing regional parent and child fostering capacity, either in house or commissioned from an IFA, would provide local capacity where commissioners have more influence in cost and quality.

Fostering services

Key messages

- There is increased difficulty in recruiting enough foster carers and the issue of authorities outside of the region purchasing placements has resulted in a shortage.
- There is also growing demand for more specialist foster placements, including:
  - Transitional foster carers
  - Children with autism

- o Children with learning disabilities
- o Young people who exhibit multiple risk-taking behaviours including substance misuse, risk of CSE and absconding
- o Parent and child placements; and
- o Welsh language foster placements.
- The increase in the number of children becoming looked after has subsequently made placing children in a local provision harder.
- These increased levels of demand for foster carers, both within the region and nationally, has resulted in further difficulties when securing appropriate placements for children.
- There is considerable uncertainty in the market with the commitment to eliminate 'for profit' provision and the impact of the pandemic impacting the ability to identify foster carers across the region.
- A growing area of concern for the region are foster carers who do not have the correct skills to support children, often resulting in them being placed in emergency/ bridging placements.

Recommendations

1. Increasing in-house capacity to respond to the demand for foster carers will be help address many of issues identified above.
2. In addition to a new recruitment campaign, review and enhance the offer to foster carers to increase the likelihood of encouraging new foster carers.
3. Introduce different commissioning models to encourage/ensure IFAs have tailor their offer to local requirements.
4. Investment in preventative, respite and edge of care services can help reduce the need for children to be looked after away from their families.
5. Engagement with IFA providers will be vital before and during the transition to a not-for-profit model to ensure that capacity isn't lost.

Domiciliary support services

Key messages

- The increase in the over 65 population and in particular the 85+ population presents an expected and unprecedented increase in demand on services.

- Demand for domiciliary care is likely to grow in the long term due to the aging population and the increasing numbers of people with dementia and other complex needs.

- Recruitment and retention have become increasingly challenging due to competition from other sectors and the pandemic and associated risks.

- This underlines the need to develop support and services that promote and maximise independence, ensuring the provision of acute and longer-term support is targeted to those in most need, including specialist support for children with disabilities and their families.

- The number of double handed calls has increased, reducing capacity and the requirement to upskill staff and provide more complex equipment.

- The number of urgent orders for complex equipment has increased significantly and continues to rise.

- The overall stability of the domiciliary care market in the region appears fragile and risks sufficiency in meeting demand and expectations based on current projections.

- There are opportunities to build on Community resilience models developed to support COVID response to create resourceful communities under a place-based approach.

Recommendations

1. Commissioners and providers need to work together across the region to develop innovative sustainable services to meet needs.
2. Investigate alternative, new models for recruiting and retaining a skilled workforce.
3. In line with The Healthier Wales Action Plan (2019), continue to prioritise 'the shift from hospitals to communities and communities to homes', and emphasise the important role played by right-sizing community services to facilitate timely discharge.
4. Processes and procedures for setting fee across the region should be reviewed to consider greater consistency and address issues relating to costs (e.g. national commitment to the Real Living Wage).