Market Shaping in Adult Social Care
The Institute of Public Care

- We are part of Oxford Brookes University.
- We work with our clients to deliver better health and social care outcomes.
- We use our professional experience and academic rigour to drive improvement and innovation, and to generate new learning for the benefit of people, organisations and communities.
# What we do

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Health and social care

Commissioning
- Local authorities
- CCGs

Health and care services
- Locally commissioned services
- Nationally commissioned services

Department of Health
- NHS England
- Public Health England

Regulation and data
- NHSI
- CQC
- NICE
- NHS Digital
- SfC
How the money flows

- **HM Treasury**
  - NHSE £106b (CCGs £76b)
  - NHS transfer
  - Local authorities £17b

- **Local authorities £17b**
  - £3b NHS spending on social care
  - Social care providers
  - £10b self-funded care
  - Unpaid care

- **Patients / service users and carers**
  - £55b - £132b
  - £2.5b service user charges
  - £1.4b direct payments

- **Local citizens**
A duty towards care markets

The Care Act (2014) placed a new duty on local authorities to promote the efficient and effective operation of the market for adult care and support as a whole.

- Sustainable
- Diverse
- Quality
What does the market look like?
The number of care home beds in England has fallen 2012 - 2017

Institute of Public Care (2017) Market Shaping in Adult Social Care
The number of care homes has fallen rapidly

-1,409

-7.9%

% change in the number of care homes from April 2012 to April 2017
Homes are getting bigger

Homes closing

Homes opening

29

37
Workforce issues

New nurse registrants from the EU

Total number of EU nurse registrants in the UK, January 2016–April 2017

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Challenges

'Lack of money' prompts care firms out of care homes market

Home care crisis as more private companies quit: The elderly are being put at risk as firms abandon services, watchdog warns

- The Care Quality Commission said more
Key components of market shaping

Shared understanding of supply and demand

Activity taken to influence current and future range of care and support - published in an MPS
Care home development in Poole: why

- Increasing need
- Home closures
- Self funders
- Increase in placements outside the borough
- Delays in discharges
Care home development in Poole: lessons learnt

- Capital investment
- Financial viability
- Public and market engagement
- Political engagement

Phil Hornsby
P.Hornsby@poole.gov.uk
Stimulating micro enterprises in Somerset

- Traditional homecare services struggling
- Lack of capacity, particularly in rural areas
- Low take up of direct payments
- Tap into local creatively and enterprise

Vanessa’s story: how community enterprise helped us get a good life
Stimulating micro enterprises in Somerset

- Support via Community Catalysts
- Nurturing small community enterprises
- Offering older people a wider choice of local care options
- Support conditions for micros to thrive:
  - Code of conduct
  - Best practice and quality
  - Link with civic institutions (GPs, Parish councils)

Iona Brimson
IBrimson@somerset.gov.uk
Impact

- 300 community-led enterprises
- 173 new providers
- 800 people helped to stay at home
- 180 jobs created
The result: innovative, personal, local, flexible support for marginalised communities, value for money

The ‘ripple effect’ – local jobs, local money staying local, community confidence and resilience…….
Conclusion

- Better understanding of how to influence demand
- A better understanding of the local health and social care market
- Better dialogue and relationships
More Information

- What is market shaping?
- Market Shaping in adult social care
- Market position statement guidance and MPS database
- Six steps to managing demand in adult social care
- Zena Dighton: Ws c-6 Figbury Lodge presented at the National Commissioning and Contracting Training Conference October 2017
- Sian Lockwood: Community Catalysts in Somerset presented at the Care Markets and Quality Forum September 2017
Thank you

- IPC reports and guidance available at http://ipc.brookes.ac.uk
- Sign up for email alerts from http://ipc.brookes.ac.uk
- Follow us on twitter @IPC_Brookes and @Fiona_IPC
- Contact Fiona Richardson with any questions frichardson@brookes.ac.uk