



South Gloucestershire Market Position Statement - Supporting Adults to Live Independently

April 2014

Foreword

I am pleased to present our first Market Position Statement, which sets out our vision for care and support services in South Gloucestershire and the Council's intentions as a strategic commissioner of services. Strategic commissioning is about analysing and prioritising needs in our communities and working with those communities designing and delivering services that target our resources in the most effective way.

We want providers to offer citizens choice, quality and efficiency so that South Gloucestershire residents are able to access every opportunity to live independently and maintain their wellbeing.

In South Gloucestershire we already have high numbers of people who receive self-directed support - choosing how their care budget is spent - and we want everyone using social care in South Gloucestershire to exercise control over their own care and support. We are therefore working with customers, carers and providers to shape an innovative and diverse market so people can make individual choices.

This document is aimed at current and potential providers of care and support services so that they can understand the present and future demands and how services can respond to personalisation.

The Market Position Statement starts to develop an analysis of the community care market in South Gloucestershire, bringing together data from a variety of sources including the Joint Strategic Needs Assessment, commissioning strategies, and market and customer surveys into a single document. Using this document, independent, voluntary and community organisations can learn about future opportunities and how they can develop services to address local needs. Potential providers can find out about what it takes to deliver services, including the support available through the Council and other agencies to set up social enterprises, develop businesses and strengthen skills.

All local authorities are facing unprecedented financial and demographic pressures as budgets are limited and more people are living longer. We want to promote a market which thrives on excellence and provides good quality services where people can achieve better outcomes, safely and independently in their communities as well as achieving value for money from the available resources.

Peter Murphy
Director for Children, Adults & Health

Introduction

In South Gloucestershire we recognise that in the current financial and demographic context if we don't find new ways to help people to find better solutions we will not be able to meet the needs of those who are most dependent upon support, we end up rationing services and only intervening in crisis situations. We have recognised that we all need to work differently and have started on a journey to change our approach so that we;

- Focus on people's strengths and assets, both as an individual and within their wider family and community.
- Find new ways to engage individuals and communities and to deliver services differently.
- Have different conversations with individuals around "what matters to you" and "how can we work with you to find joint solutions?"
- Build a culture which encourages creativity and innovation across the whole sector, seeing providers as full and equal partners
- Ensure that people speak to someone who can help them there and then, this may be someone within the council or one of our partner agencies
- Raise awareness of the cost of social care provision within local communities and provide them with information as to how such needs arise and how more resilient and supportive communities might help prevent them.

Demographic Profile - Trends and Forecast

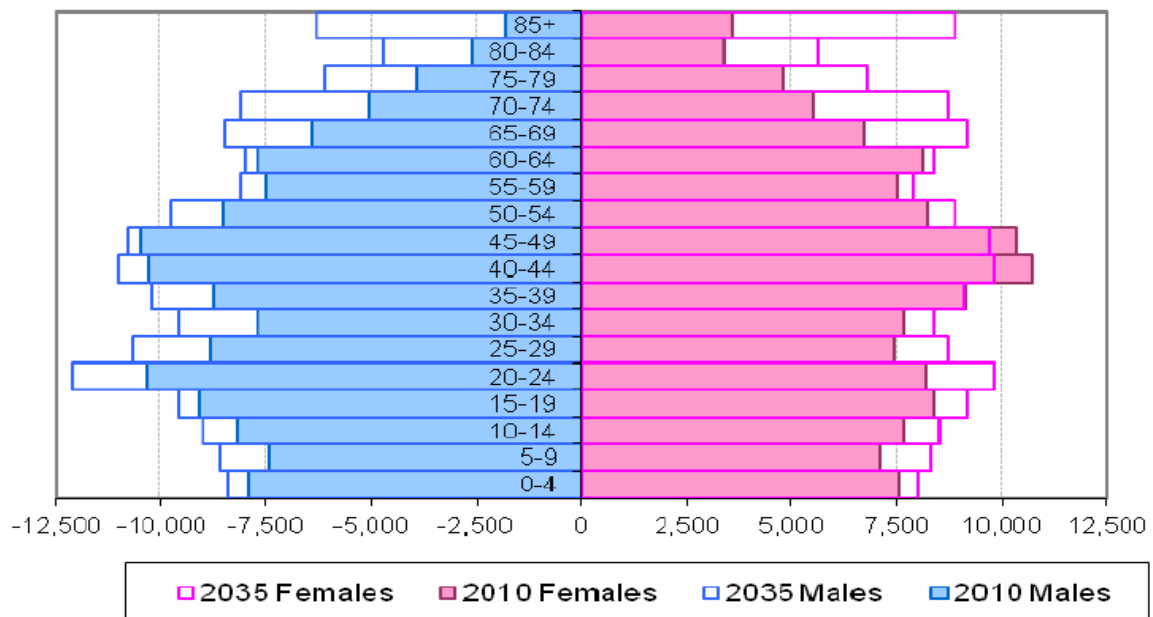
Based on the 2011 census, it is estimated that in 2013 there were approximately 273,100 people living in South Gloucestershire. Around 60% living in the urban areas surrounding Bristol, around 20% in the small market towns to the north and the rest in the rural areas in between. Some 5.7% of the population is estimated to be of black and minority ethnic origin, which is about half the national average.



The population is set to grow substantially, due to the number of births exceeding the number of deaths as well as net inward migration. Projections are that there will be 283,700 people in 2018 and 313,600 in 2035. If proposed additional housing development (from the Council's Core Strategy) is taken into account, up to 10,393 new homes will be built by 2018 and could increase the population by a substantial amount.

The population will also age over the next 5-20 years as life expectancy increases and people from the post-war 'baby boom' reach old age.

South Gloucestershire male and female population estimates, mid-year 2010 and 2035 projection



Source: ONS 2010 subnational population projections & mid-year estimates

Although South Gloucestershire has a lower proportion of elderly people than the UK average, people aged 65 years and over are the fastest growing age group.

Longer term ONS projections suggest that there will be around an extra 29,200 people aged over 65 years in South Gloucestershire by 2035 compared to 2010 figures; an increase of 66%. The greatest concentration of older people live on the fringes of Bristol in the Kingswood, Downend and Filton areas. Thornbury and the more rural areas of South Gloucestershire also have a significant proportion of over 65s.

The number of people aged over 85 is expected to nearly triple in the next 25 years, from around 5,378 in 2010 to 15,300 in 2035.

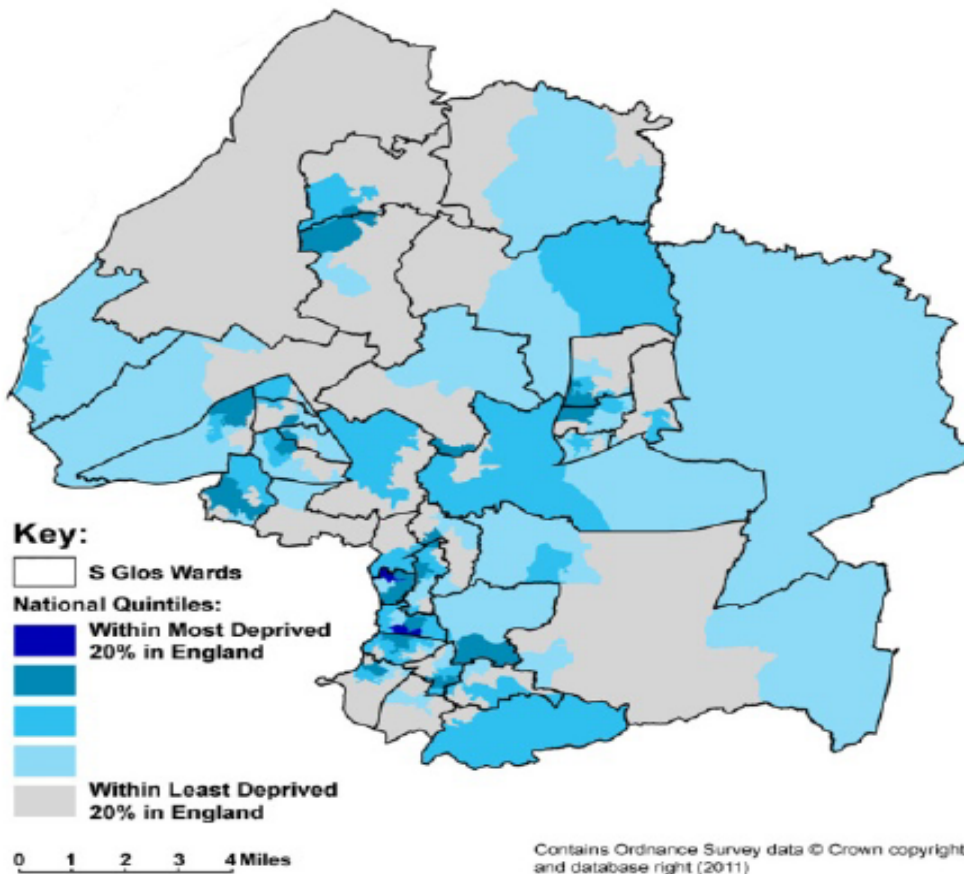
Table 2: South Gloucestershire wards with the highest number and percentages of older people (65+) in 2010

Ward name	%	Ward name	No.
Westerleigh	25.7	Downend	2,439
Winterbourne	24.5	Hanham	2,277
Thornbury North	22.8	Rodway	2,212
Chipping Sodbury	22.2	Kings Chase	2,164
Severn	22.2	Filton	1,807
Thornbury South and Alveston	21.8	Thornbury North	1,794
Downend	21.7	Winterbourne	1,781
Hanham	21.5	Woodstock	1,675
Yate Central	20.7	Thornbury South and Alveston	1,644
Frampton Cotterell	20.4	Yate Central	1,601
Rodway	20.3	Chipping Sodbury	1,557
Longwell Green	20.0	Yate North	1,499
Bitton	19.7	Frampton Cotterell	1,472
Kings Chase	19.7	Emersons Green	1,446
Almondsbury	19.5	Longwell Green	1,443
Cotswold Edge	19.2	Boyd Valley	1,424
Boyd Valley	18.4	Stoke Gifford	1,420
Staple Hill	18.4	Staple Hill	1,319
Ladden Brook	17.3	Patchway	1,251
Filton	17.2	Parkwall	1,180
Woodstock	15.8	Oldland Common	1,068
Pilning and Severn Beach	15.6	Westerleigh	998
Parkwall	14.5	Bradley Stoke Central and Stoke Lodge	871
Patchway	13.9	Severn	828
Oldland Common	13.9	Dodington	799
Charfield	13.0	Almondsbury	768
Siston	13.0	Bitton	684
Yate North	12.9	Ladden Brook	671
Stoke Gifford	11.5	Cotswold Edge	630
Emersons Green	11.3	Frenchay and Stoke Park	626
Bradley Stoke Central and Stoke Lodge	10.7	Charfield	593
Dodington	9.7	Siston	589
Frenchay and Stoke Park	9.4	Pilning and Severn Beach	581
Bradley Stoke North	8.0	Bradley Stoke South	399
Bradley Stoke South	4.2	Bradley Stoke North	338
South Gloucestershire	16.5	South Gloucestershire	43,828

Source: ONS 2010 mid-year estimates

South Gloucestershire as a whole is an affluent area: only 10% of local authority areas in England are more so. Like most other places in the country, there are locations within the area which are much worse off, and they represent about 10% of the population. These locations are referred to as 'Priority Neighbourhoods' and are in Kingswood, Staple Hill, Yate, Cadbury Heath, Filton and Patchway

Figure 9: Indices of Deprivation 2010, Income Deprivation Affecting Older People Index (IDAOP), South Gloucestershire



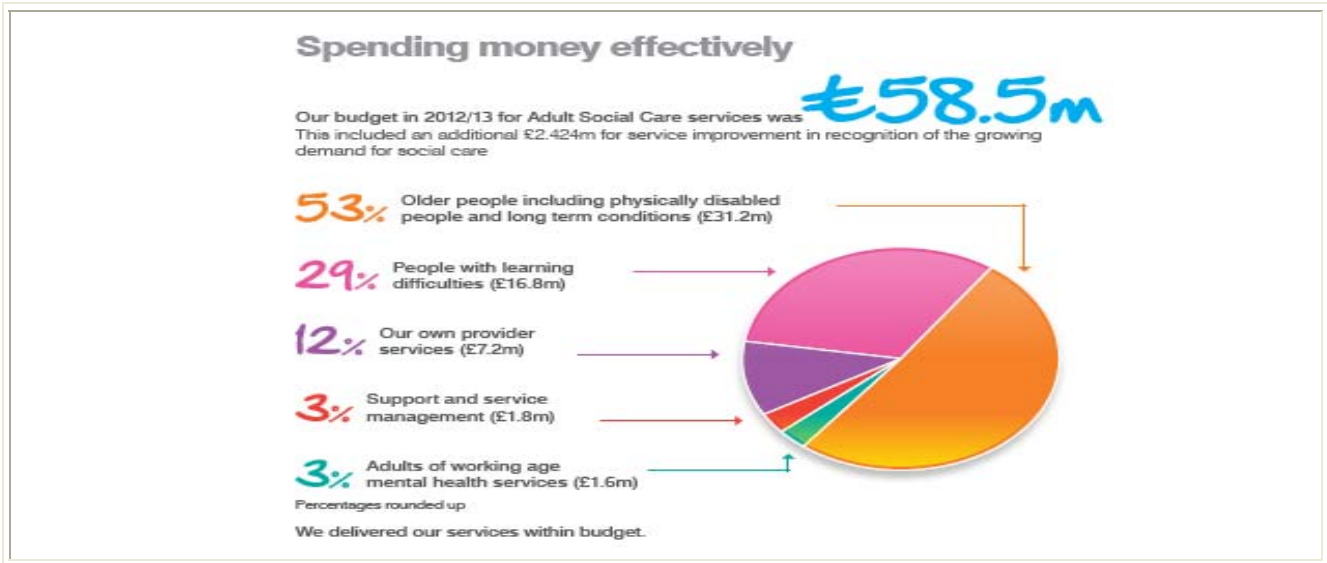
Source: Indices of Deprivation 2010, South West Observatory

The numbers of people with learning difficulties living in South Gloucestershire are estimated as follows:

- A total adult learning difficulties population of 5,028 of which 4,101 are estimated to be aged between 18-64 years;
- 1,048 people aged 18 and over predicted to have a moderate or severe learning disability
- 246 people aged 18-64 predicted to have a severe learning disability
- 929 people known to statutory agencies
- 327 people in care homes, of which 20 are in care homes with nursing.

(Source: Projecting Older People Population Information / Projecting Adult Needs and Service Information 2011).

Resources and Demand Profile



Members have recently approved the medium term financial plan (MTFP) for the Council covering the next 6 years which, in order to deliver a balanced budget over the period projects requires savings in the order of £40m. These are over and above savings of £43m which will already have been achieved by 2014/15. The budget was finalised following extensive consultation with residents which included road show events at the district's main shopping areas, together with paper and online surveys and Area Forum exercises. In total, more than 2,300 people responded to the consultation. Respondents were asked to consider which services the council should prioritise in the coming years, with care for vulnerable older people identified as the highest-priority service (selected by 68 per cent of respondents). Despite this the Children, Adults and Health Department's share of the £40million is £13.7 million (13%), a significant amount of this is proposed to be achieved through how we commission services and support and will require us all to work very differently to how we do at present.

Welfare Reform

The Council recognises that the significant welfare reforms currently being implemented will have a significant impact, particularly on South Gloucestershire's disabled population. For example we recognise that there is potential that these changes may increase demand for social care services which in turn impact on providers and their development strategies to deliver Accommodation with Care.

Demand and Supply, Market Analysis and Commissioning Intentions

The focus of the document and the remainder of the document is an analysis of current market provision, trends, current and future commissioning arrangements, strategic commissioning intentions and resulting business opportunities. Where practical this follows the format of the Customer's journey through services beginning with low-level preventative services and working through to more intensive care/support such as Residential and Nursing Care.

Information, Prevention, Technology & Carers

As an authority we recognise the importance of investing in services that prevent individuals from needing social care support in the future. Individuals eligible for funding are those identified as having substantial or critical needs (Fair Access to Care Services). Due to funding criteria and the continued growth in personal wealth, we expect to see an increase in the self-funder market for non-residential services and an increased uptake in low level support services purchased directly by customers.

One of our priorities has to be to ensure that the whole population is better informed and equipped to take control of their own lives and to put in place the arrangements that they need to live the life they chose. We need to ensure that people have access to good, accurate and up to date information so local authority resources can be targeted at those who will benefit most from an intervention.

Over the last year we have worked with a voluntary sector partner to pilot an approach to improving access to information and advice for people who contact Adult Services, this initiative has seen a significant number of individuals diverted to more appropriate solutions rather than being offered traditional social care solutions which, if utilised too early, can create a culture of dependency.

Local data identifies that there are more than 27,000 carers in South Gloucestershire, at least 4,054 of whom are providing unpaid care for 50 hours or more, per week. As 65% of carers do not identify themselves as such in their first year of caring, and many never do, this number is likely to be a huge underestimate. We currently know of approximately 2,500 of which 817 come from BME communities with the largest numbers of carers from BME communities

are carers from Asian and Asian British Communities (432). 15,701 carers are balancing work and care.

The current Joint Carers Strategy was developed by South Gloucestershire Council, NHS South Gloucestershire and the Carers Support Centre runs until 2014. Within the strategy 5 key priority aims have been identified;

Aim 1: Carers will be supported to identify themselves as carers at an early stage and carers will be respected as expert care partners and will have access to the integrated and personalised services they need to support them in their caring role, enabling them to have a family and community life.

Aim 2: Carers will be able to have a life of their own alongside their caring role and are enabled to fulfil their educational potential.

Aim 3: Carers will be supported so that they are not forced into financial hardship by their caring role and are enabled to fulfil their employment potential.

Aim 4: Carers will be supported to stay mentally and physically well and treated with dignity.

Aim 5: Carers will have access to a wide range of advice and information to support them to carry out their caring role in the context of their individual life. Information needs to be supplied in a timely manner.

In addition to the carers priorities listed under the aims below there were three cross cutting themes identified by all carers as key to the future development of support and provision of services;

- Support and services must be accessible to all recognising every carer as an individual, giving consideration to age, disability, gender, sexual orientation, race and ethnicity, religion or belief as well as language and communication needs;
- An approach which promotes access to preventative services with a focus on enabling carers to sort out the simple things can make a huge difference to their lives;
- Recognition of carers as expert care partners.

Over the last 18 months we have worked together with carers to co-produce 'Do you look after someone, Getting Help and connected' and 'Connecting carers' as positive outcome focused tools to support carers and will continue to promote their use. At the same time we have seen an increase in the number and range of carer led peer support groups which are continuing to thrive.

Direction and possible Business Opportunities.

- A priority in 2014 is to review our existing customer information arrangements and seeking opportunities to improve the accuracy and availability of information for the general public. We will evaluate the impact of the www.wellaware.org.uk information hub, face to face, online and printed information prepared by the Council and partners. We recognise that increasingly technological developments offer new accessible ways to inform and communicate with citizens. We have heard that often it is not a lack of information that is the problem but the timeliness of how it is delivered.
- South Gloucestershire recognises the positive impact that the role of 'community connectors' can have on keeping people independent and well, we will explore the potential to establish a Local Area Coordination approach as well as engaging with other initiatives focused upon asset based community development.

- Enabling universal access to preventative services can help individuals to remain independent, opportunities exist to provide services and support at affordable rates which can be marketed directly at members of the community who may benefit most – there is significant interest in cleaning, gardening, shopping, simple home maintenance as well as pet care and visiting / befriending initiatives. We are developing tools to support the development of micro enterprises.
- We are promoting to providers the opportunities available through the self-funder market offering low level support services directly to customers, we recognise the need to ensure that people who fund their own care have access to good financial advice.
- We are promoting and supporting communities to become “dementia friendly” in line with the Prime Minister’s Challenge on Dementia, initially this work has focused on Patchway and the Cribbs Causeway area but partners are now working to expand the approach across South Gloucestershire.
- We are working with the voluntary sector to review how we commission services to ensure that resources are being used as effectively as possible and that there is both sufficient capacity and appropriate services to help people to remain at home. We are keen to support a vibrant community sector that is not dependent upon public sector funding.
- Continuing work is needed to reduce the cost of social care packages through the use of Assistive Technology.
- We welcome expansion of the market in Assistive Technology and wish to work with providers of Residential/ Nursing Care, Extracare and care at home to identify how services can be remodelled using Assistive Technology.
- We will continue work with providers to embed the use of technology to support people with dementia, stroke survivors and people living with other long term conditions to have greater control over their lives, remain in their own homes with support from carers.
- Our carers support service will be re-tendered within the next 12 months, we will be seeking to ensure that priorities within the Carers Strategy are addressed, with carers being supported to continue caring whilst being able to live a life outside of caring and the independence of both carers and those they support being maximised.
- We will ensure there are mechanisms in place to meaningfully involve carers as expert care partners in service commissioning, delivery and monitoring of services at all levels.
- We will continue to support the establishment and development of carer led peer support initiatives which help carers maintain their own identity and offer mutual support. We are particularly keen to support further initiatives which recognise the diversity of our communities.

Day Opportunities and participation

In recent years there has been a significant shift in the way day opportunities are accessed and participation within the community is supported, these changes will continue in response to customer expectation and demographic pressure.

The Council concluded its 'What people do in the day' review in 2013 which recognised that significant progress has been made in modernising services and providing more individualised and personal solution to support people in their lives. There are no longer any large scale Day Centres in South Gloucestershire and there is a very diverse range of community and smaller scale building based provision provided by the independent and not for profit sector and by the local authority, with the majority of capacity being commissioned either by the council or by Direct Payment recipients.

In South Gloucestershire we are working hard to promote a presumption of employability, working to ensure that all disabled people have the opportunities and support to live fulfilling lives and are supported to develop their skills and interests when ever possible leading to employment, self employment or contributing to their community in other ways. Sustaining this approach requires everyone to work together and to start by raising the aspirations of young people, ensuring that there is easy access appropriate learning and training, work experience and volunteering opportunities and support to enable young people to develop the skills for independent living and getting out and about within the community. The current work to establish a 0-25 disability service, together with consolidation of the existing employment support services with the commissioning of current work to re-commission employment services in South Gloucestershire will both help to drive an improved emphasis on employment.

Loneliness and social isolation can affect everyone but older people are particularly vulnerable after the loss of friends and family, reduced mobility or limited income. It is estimated that among those aged over 65, between 5 and 16 per cent report loneliness and 12 per cent feel isolated. These figures are likely to increase due to demographic developments including family dispersal and the ageing of the population. Studies show that acute loneliness and social isolation can impact gravely on wellbeing and quality of life, with demonstrable negative health effects. It is also associated with depression (either as a cause or as a consequence) and higher rates of mortality. The influence of social relationships on the risk of death are comparable to well-established risks such as smoking and alcohol consumption. Health issues arising from loneliness and isolation add pressure on statutory health and social care services. In South Gloucestershire we recognise that by intervening in this issue, we can improve older people's quality of life, while limiting dependence on more costly services. Partners are working together to tackle loneliness and isolation through the successful Precious Time partnership. Precious Time recognises that everybody has skills and talents that can benefit someone else, it promotes principles of reciprocity and mutual respect.

In order to ensure that people benefit from strong natural support networks we are keen to ensure that people are able to participate in activities and groups within their own communities and neighbourhoods. South Gloucestershire has a strong and vibrant community sector with we continue to work with partners to strengthen this, promoting an asset based approach building community capacity rather than seeking to provide services.

The approach to supporting people affected by dementia in South Gloucestershire places a significant emphasis on ensuring people can continue to live an active life and remain as independent as possible within their community. This approach promotes inclusion and seeks to ensure that there are opportunities and support for people to participate in activities and groups that appeal to their interests. We have seen an increasing range of community based activities being established across South Gloucestershire and continue to promote this approach. The community lead work to develop Patchway and Cribbs Causeway as a dementia friendly community is starting to have a real impact, the influence from which is being shared across South Gloucestershire.

The Council's remaining in-house day services are currently being redesigned making use of the modern purpose built facilities available to them. The new service model is designed to support a reducing number of individuals but recognises that for a small proportion of the population there remains a need for particularly accessible facilities. The new promoting independence service will be a community facing service operating from Kingswood and Thornbury working with individuals to achieved agreed outcomes with a particular emphasis on moving on to become more independent whilst the dementia service in Yate will seek to complement and engage with community based support and as individuals' needs become greater.

Direction and possible Business Opportunities.

- Greater emphasis on people of working age being supported to work and contribute to their community, opportunities to work with disabled people to create employment opportunities and enterprises.
- Re commissioning employment support services during 2014.
- There remains a continuing interest in ensuring that community groups and venues are accessible to all people and that groups make themselves welcoming and supportive.
- The increase in Personal Budgets and a greater emphasis on supporting people to take control of their own lives means that increasingly individuals will be making their own arrangements and will be looking for flexible, value for money activities.
- Where the council is purchasing services on behalf of individuals we shall do so either via the community support framework agreement or via a new building based day services framework agreement.
- Older and disabled people have often been incorrectly seen a burden who are passive recipients of services, in South Gloucestershire we are working together to develop a culture which sees people as assets with their own set of skills and interests which can be used to benefit others, particularly where this presents opportunities to work across different age groups. We will be working with partners to explore how this approach can have a beneficial impact.
- South Gloucestershire is keen to continue supporting peer led groups and activities, where people are working together to support each other.
- The most effective and popular activities that can be developed are those that promote the maintenance of an active mind and active body, make the use of natural resources and those that create an opportunity for people to build and maintain social networks focusing on a shared interest e.g. Knit and natter, mensheds, friendship clubs and (gentle) exercise groups. There remains scope for the establishment of other initiatives responding to community interest.

- Over time the number of people with dementia is increasing substantially and diagnosis rates are improving rapidly (Across South Gloucestershire GP practices and the Memory Service have diagnosed 55.3% of those currently expected to have dementia. This compares well with the national average of 48-49%). We therefore need to continue to increase the range and type of community support options available to people to help them live well with dementia within their local communities and remain independent for longer.

Support in the Home & to access the community

In South Gloucestershire we have implemented a reablement approach, which means that for the majority of people who are identified as requiring support this will initially be through the Promoting Independence reablement service, a multidisciplinary approach designed to work with the individual to support them to make progress on shared goals designed to improve confidence and regain or retain a level of independence. We have established two Promoting Independence (reablement) teams, one focused on supporting timely discharge from hospital and the other working across the community, both are supported by reablement practitioners commissioned from an independent sector partner. Building on earlier pilots this approach has been fully rolled out across South Gloucestershire from February 2014.

One of the aims of the reablement approach is to increase people's independence and reduce the need for ongoing support however where it is recognised that there will be a need for longer term support the reablement team will work with that individual and their family (when appropriate) to agree longer term outcomes and explore how they can best be achieved within an identified personal budget.

The further development of self-directed support is a priority in South Gloucestershire – this means a different way of thinking across the whole system including the way providers operate and engage with the people they support. We want to increase substantially the uptake of Direct Payments and will explore whether there are benefits to be gained by investigating the use of Individual Service Funds (ISF's). The aim is to ensure that there is greater choice, control and flexibility for users of our services and that we support people to live the lives they choose.

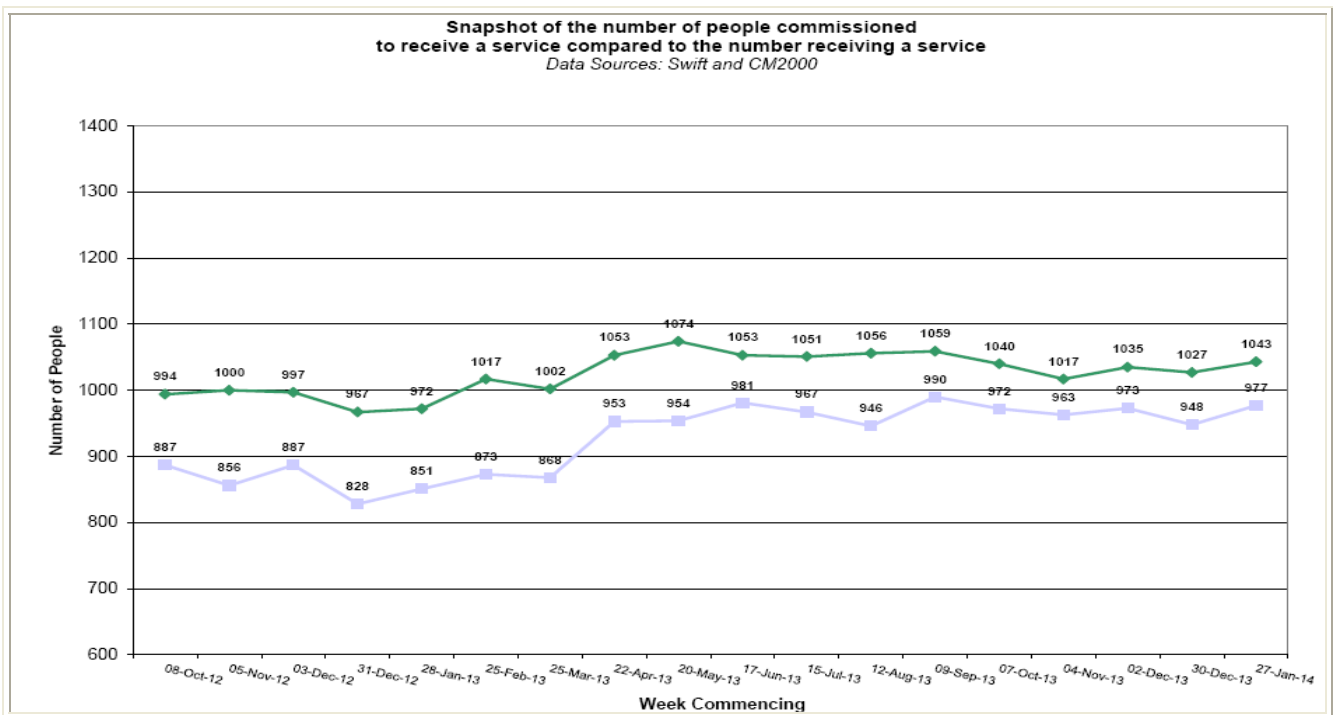
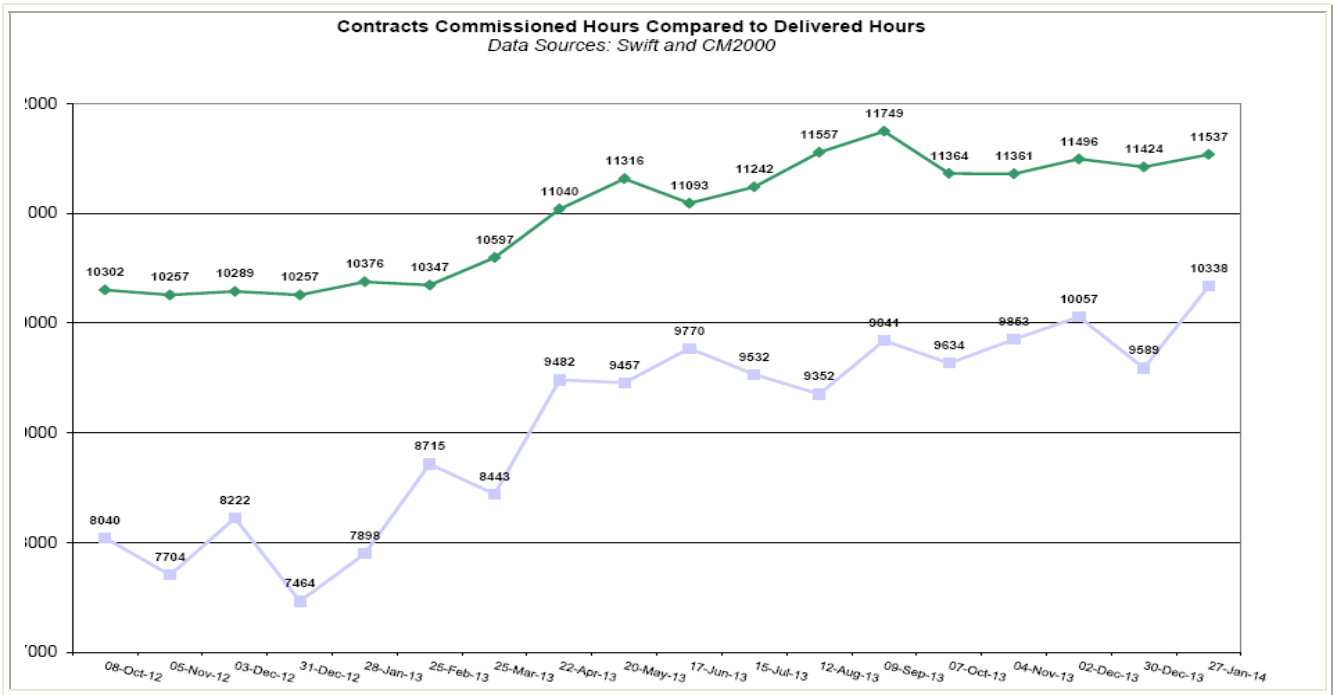
During 2014 we will be commissioning new arrangements to support the increased take up of direct payments including the introduction of a payment card and the establishment of a recognised provider list of organisations to support direct payment recipients.

South Gloucestershire recognises that central to our aim to increasing the use of direct payments is to ensure that there is an innovative and dynamic market able to work with direct payment recipients as 'micro commissioners'. This increasing flexibility and responsiveness is also vital to supporting the continued growth in the number of people who fund their own care.

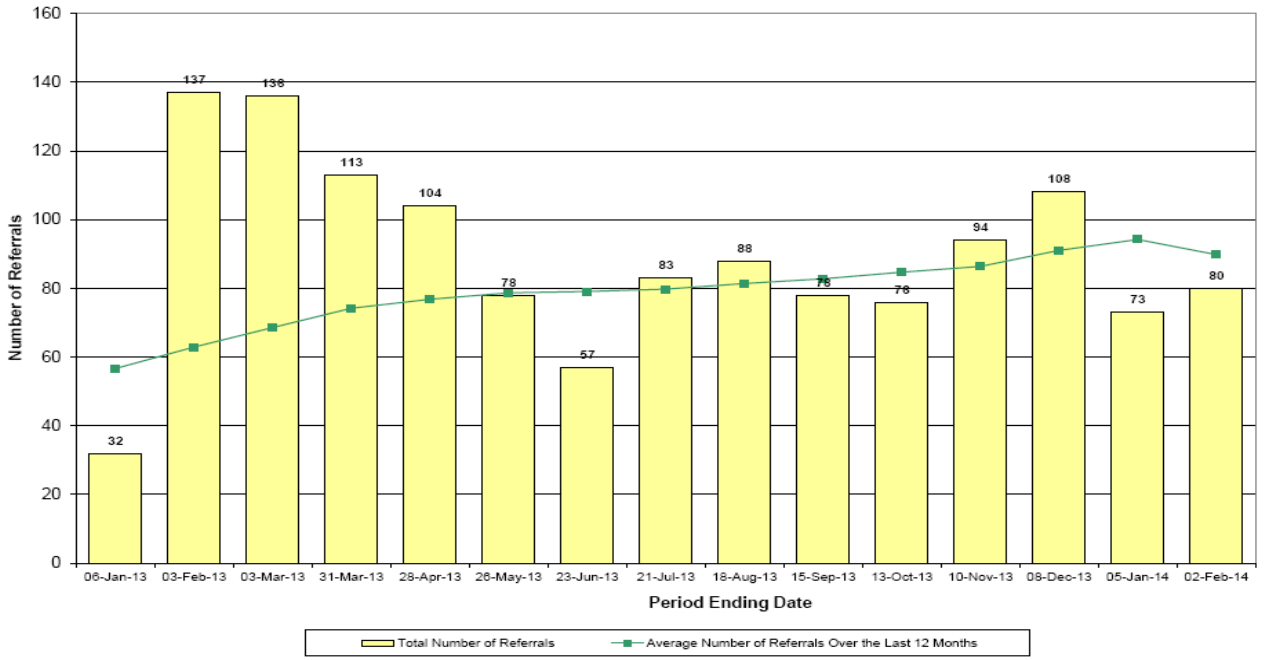
Equally important is the growth and development of the Personal Assistant workforce, during 2014 South Gloucestershire will be working extensively with this sector and with user led organisations to focus on bringing about the renewed emphasis that is needed.

South Gloucestershire recognises that even with a renewed emphasis on direct payments there will always be a need for local authority purchased support, this continues to be purchased via a framework agreement. South Gloucestershire's new Community based Support Framework is being introduced in February 2014. This is an open framework agreement and we welcome new providers onto the framework at any time. In line with our reablement approach the new framework places a greater emphasis on 'doing things with' people who require support rather than 'doing things for'.

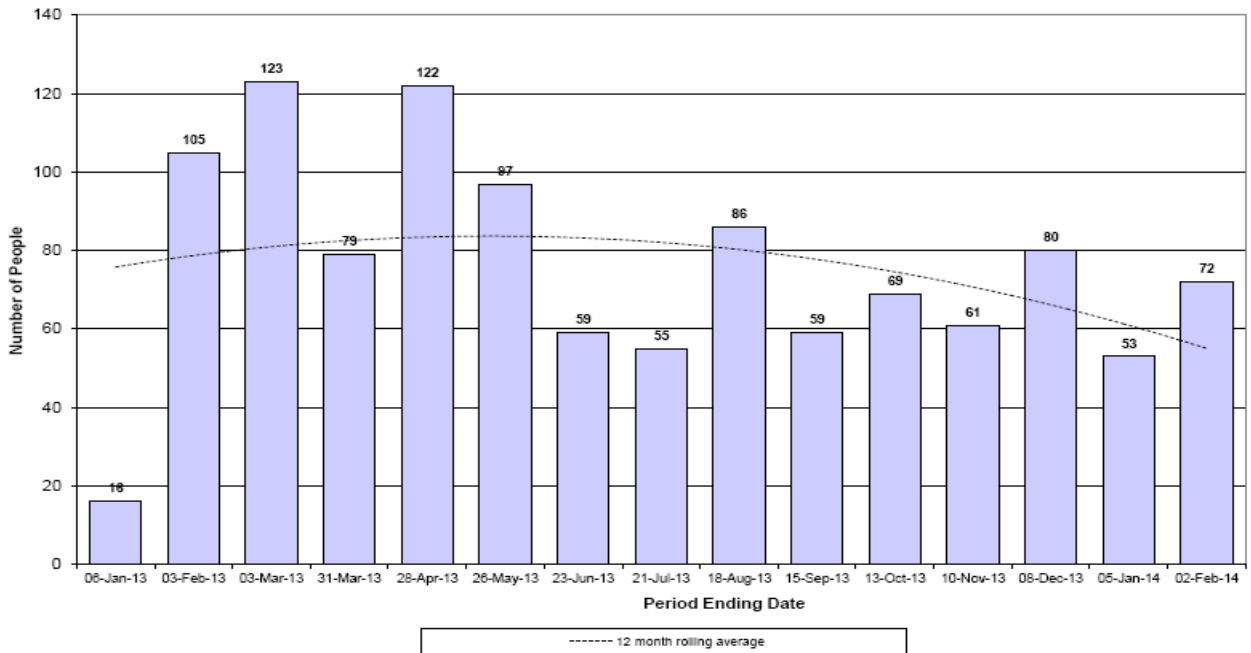
The following charts identify trends in provision purchased by the local authority;

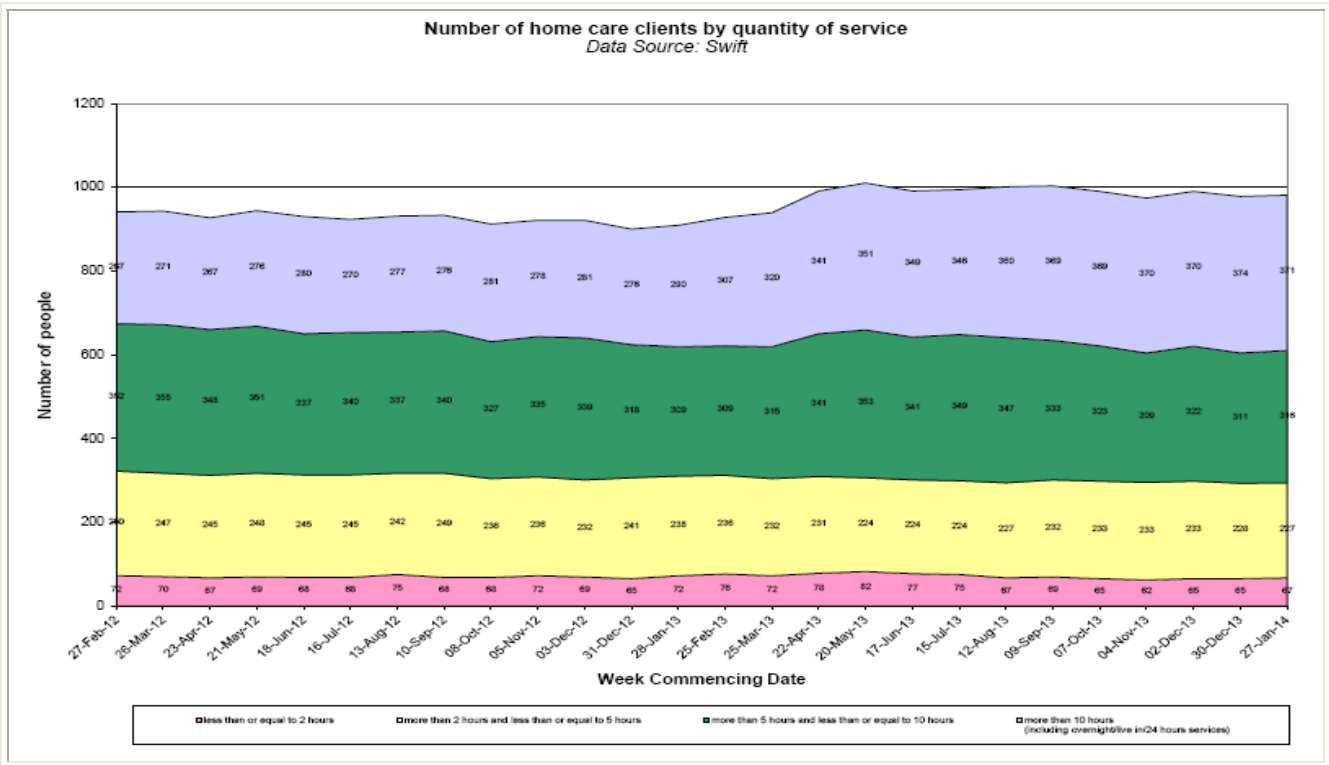
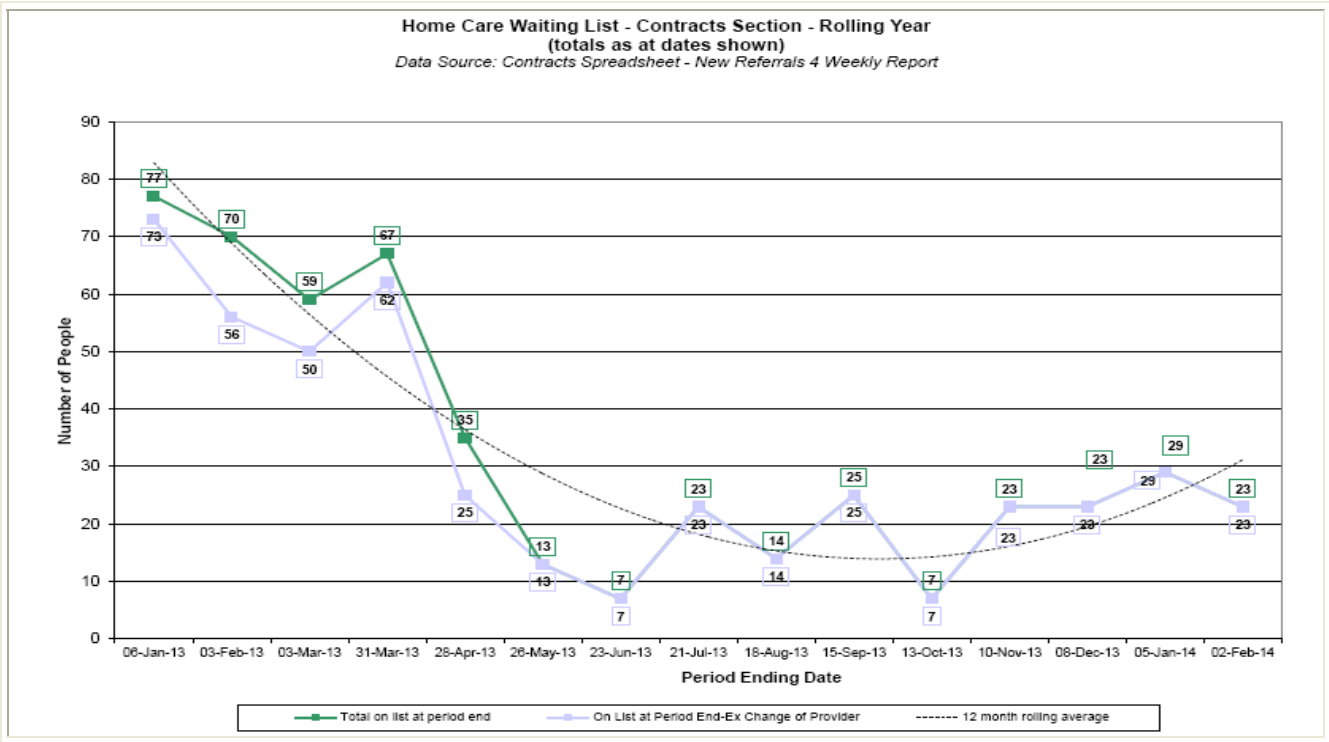


Total Home Care Referrals - Contracts Section
 Data Source: Contracts Spreadsheet - New Referrals 4 Weekly Report



Home Care Services Started - Contracts Section - Rolling Year
 (totals in four week periods ending on date shown)
 Data Source: Contracts Spreadsheet - New Referrals 4 Weekly Report





We recognise that there are particular geographic areas and communities of interest within South Gloucestershire where it is more challenging to meet individual expectations and offer appropriate choice and control. We are keen to work with partners to explore more innovative and creative ways of responding to the challenge of providing support in those communities and are particularly keen to explore the potential for supporting the development of micro-enterprises. The areas presenting the greatest challenge tend to be the less populous rural areas, especially along the Severn estuary and the outlying rural

villages on the eastern border of South Gloucestershire. It can often also be more challenging to identify support to meet needs of individuals from minority groups, particularly when a request for support in a particular language other than English.

South Gloucestershire has recognised that the 'Shared Lives' model fits closely with our approach to promoting independence and personalisation. The Council has recently agreed to 'spin out' the existing small 'in-house' Shared Lives scheme and is working to achieve this during 2014. The existing scheme works predominantly with people with learning disabilities and a smaller number of people with dementia. The business case supporting this approach recognises that there are significant opportunities for the Shared Lives approach to be expanded in South Gloucestershire and to be of benefit to a wider population. It is hoped that the 'spin out' will be supported with social finance investment to support the growth of the scheme. South Gloucestershire will be reviewing this new and innovative approach and exploring whether there are further opportunities to seek social finance investment.

Direction and possible Business Opportunities.

- There is an increasing role for Homecare providers in meeting an increasing self-funding demand, where customers require a wide-range of care/ support around the home. This includes non-FACS eligible customers. Providers are encouraged to market services using www.wellaware.org.uk
- With the increased use of personal budgets and Direct Payments there is an opportunity for the Personal Assistant market to grow to meet demand.
- South Gloucestershire will be undertaking a procurement exercise in 2014 to identify a corporate partner to deliver a payment card solution to support the increased use of Direct Payments
- A Recognised Provider List of support organisations able to support direct payment recipients is being established in 2014 and we welcome providers interested in joining the list at any time. . Further information on becoming a recognised provider can be found at www.supplyingthesouthwest.org.uk
- South Gloucestershire Council welcomes new providers on to the community based support framework, particularly those providers able to deliver support in areas of under supply. Further information on the Community based Support Framework can be found at www.supplyingthesouthwest.org.uk . With the introduction in February 2014 of a South Gloucestershire wide reablement approach we will continue to work with the domiciliary care market to embed the reablement approach.
- South Gloucestershire is keen to explore opportunities to support the development of micro enterprises and other alternative approaches to meeting individual needs, particularly within communities where more traditional support is hard to arrange.
- We will be further developing quality assurance processes to ensure that Homecare services are of the right quality, with a particular emphasis on involving people who use services in monitoring quality.
- We continue to identify a need for a Rapid Response Service to provide emergency homecare backup capacity and to fill any gaps between hospital discharge (or avoiding admission) and the start of a home care service. During 2014/15 we will examine the type of service required and make a commissioning decision about the future of the current inhouse Council Service.
- We would be interested to hear of alternative cost effective ways of supporting people with complex needs.

- The Council's continues to encourage and support the provision of Changing Places facilities across South Gloucestershire.
- Working with Avon & Somerset Police the Council intends to relaunch the current 'Safe Haven' scheme as 'Safer Places' engaging with shops, businesses and community buildings, expanding from Learning Disabilities to cover other vulnerable groups.

ExtraCare & Supported Housing

South Gloucestershire has a strategic aim to enable the delivery of ExtraCare accommodation as an effective housing with care solution for Older People. Underpinning this commitment is the provision of a wider choice of tenure to match the increasing demographic change of Older People in South Gloucestershire.

Extra Care is one important component of a continuum of housing designed to meet the needs of an ageing population where care and support needs can be focussed into individual housing developments as required. The continuum includes more traditional sheltered housing schemes, some of which may eventually be converted into Extra Care Schemes, good quality housing for retirement, "assisted living schemes", as well as the general provision of "lifetime homes". The term Extra Care has therefore gained prominence as the generic description of housing with care support.

ExtraCare Housing design should enable individuals to live in self-contained flats or chalets within an environment that promotes privacy, comfort, support and companionship. Extra care should also enable lives that are active and independent by readily accessing high quality care and support services and social activities.

As well as the care and social benefits, improving housing choice for older people will in many cases release under occupied family homes in the rented and owner occupied sector thereby improving its supply. Overall its provision will lead to a better utilisation of the housing stock and can add to housing choice for local communities. Schemes may also contribute to the wider regeneration of an area through the redevelopment of buildings, the better utilisation of land and the creation of new employment opportunities.

In South Gloucestershire we have seen the development of 3 new purpose built schemes in Kingswood, Yate and Downend in addition to the conversion of two existing sheltered schemes in Filton, providing 268 units in total. 96% of accommodation provided so far has been for rental with significantly fewer units available for intermediate/shared Ownership or outright purchase.

The target is to have delivered or commissioned 700 Extracare dwellings by 2016, with a preferred tenure split of 300 rented and 400 leasehold. Beyond 2016 further Extracare housing will need to be commissioned to match the demographic profile of older people and maintain the proportion of Extracare to older people.

In order to achieve the strategic aim South Gloucestershire is working with a range of partner organisations to develop significant increases in the availability of sales and shared ownership units to reflect potential demand from older people who own their own homes.

To enable delivery and maintain quality, the West of England Housing Delivery Panel (HDP) has been developed. It consists of a group of housing organisations selected

through an OJEU compliant process to deliver market, affordable and specialist housing that specifically includes ExtraCare and across the four Unitary Authority (UA) areas of the West of England. For South Gloucestershire the HDP replaces the development partnerships of Homes West and the South Gloucestershire Housing Partnership. The HDP has been operational from October 2011 and due for renewal in September 2015.

Direction and possible Business Opportunities.

- South Gloucestershire Council has produced a design brief designed to inform potential providers of extracare housing
<http://www.southglos.gov.uk/Documents/ECH%20Design%20brief%20Nov%2013%20FINAL.pdf>
- There is a dedicated Extracare programme officer interested in discussing possible development opportunities.
- In addition, to meet emerging need, the South Gloucestershire Core Strategy policy CS20 - ExtraCare Housing - identifies three new neighbourhoods where ExtraCare will be provided. These areas are:

1. Cribbs/Patchway New Neighbourhoods Policy CS26
2. East of Harry Stoke New Neighbourhood Policy CS27
3. North Yate New Neighbourhood Policy CS31

We anticipate all new-build Extracare Schemes to be designed with the needs of people with dementia in mind and to incorporate the use of Assistive Technology as an integral part of the design.

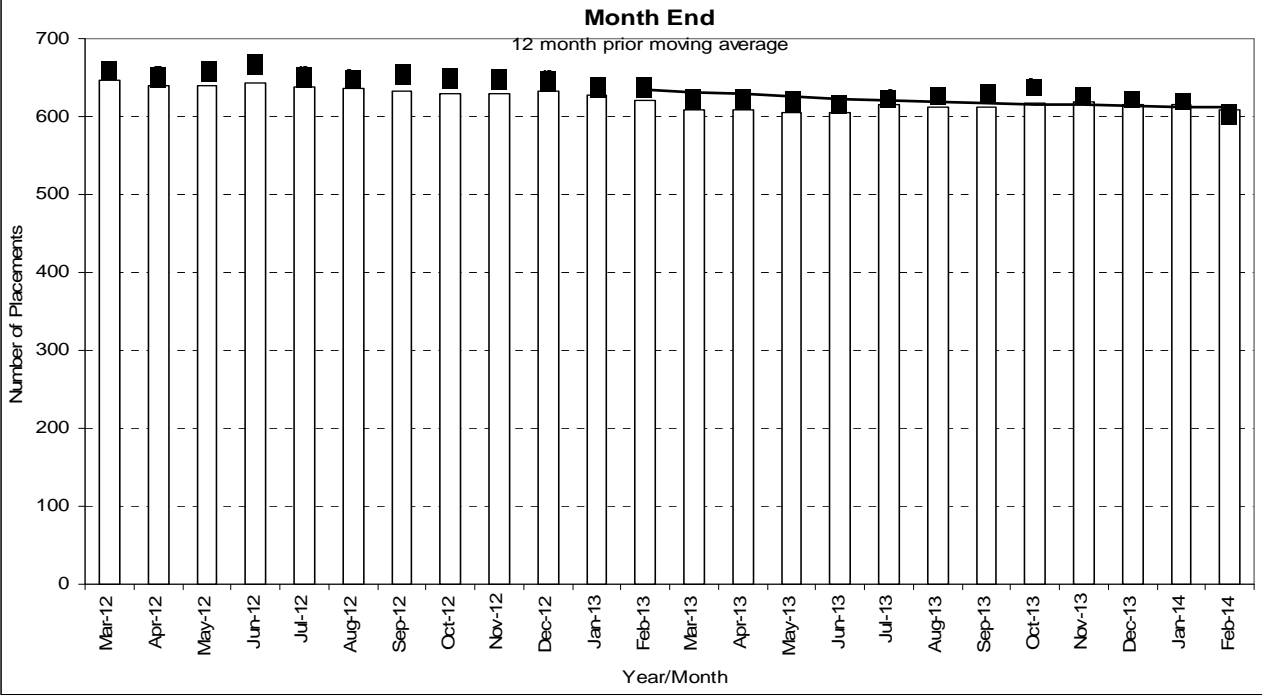
Residential and Nursing Care

In recent years we are seeing a steady decline in demand for local authority commissioned residential care with a slight increase in demand for nursing care provision. As an indicator of the population's ability to self fund Residential Care, Housing statistics show that South Gloucestershire has an above average level of owner-occupancy of 77% against a national average of 68.6%.

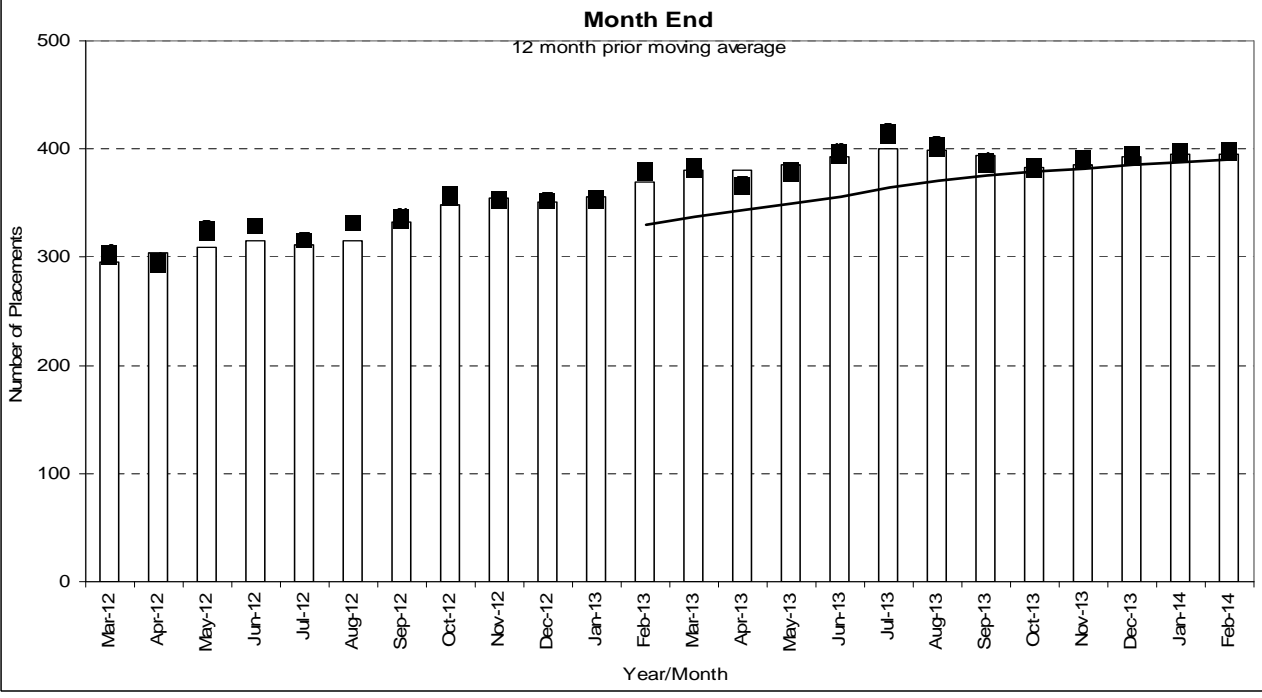
The residential and nursing care market within South Gloucestershire is diverse with 63 residential homes with capacity to support 957 individuals and capacity for a further 797 people across 20 nursing homes. Care home capacity has markedly increased in recent year with an additional five care homes having opened since 2010 providing 244 beds whilst in the same period the Council has decommissioned 170 beds across 6 homes (a net increase of 74 beds).

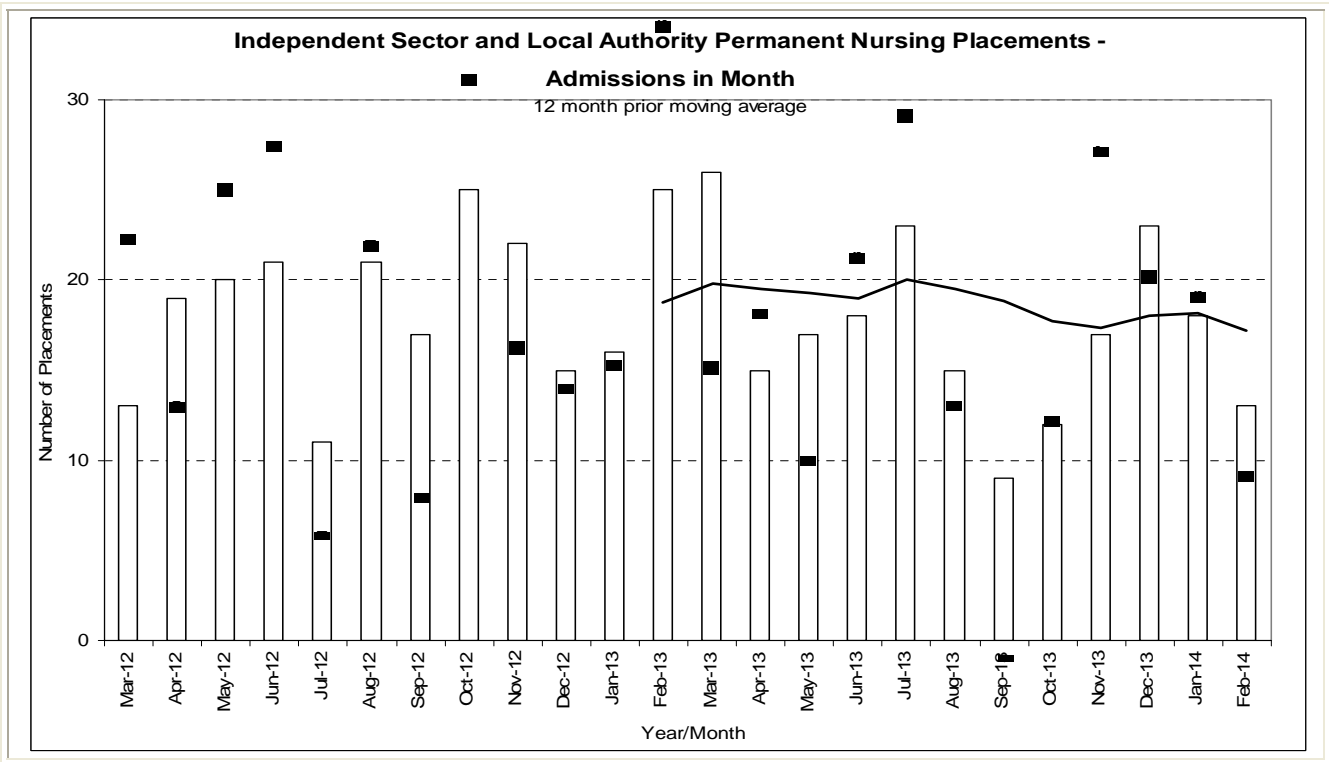
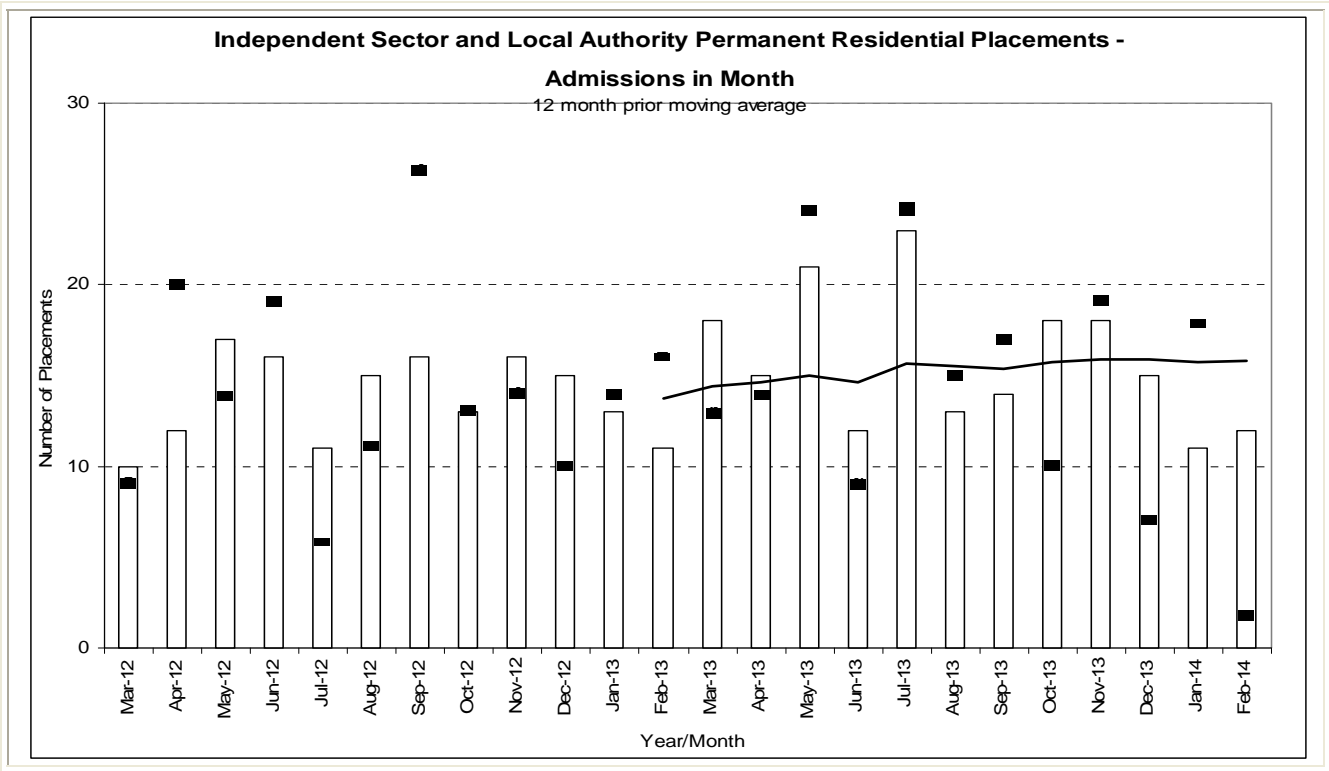
The Council receives a weekly vacancy list which details vacant beds in all nursing and residential care homes in South Gloucestershire. During the first week of January 2014, the list showed that nursing care homes had 25 nursing care beds and 28 residential care beds. Although occupancy rates change on a daily basis, this shows that overall demand for residential care is currently being adequately met by private provision and there are beds available, although there is often a mismatch between the availability of beds and individual choice.

Independent Sector and Local Authority Permanent Residential Placements - Open at



Independent Sector and Local Authority Permanent Nursing Placements - Open at





The closure of 6 local authority homes over the last 3 years has been managed in a way so as to minimise impact upon the sector.

South Gloucestershire is committed to a diverse and sustainable market and wishes to work with SME's, larger scale providers and not for profit organisations to help ensure that the market is sufficiently balanced in order to promote customer choice, quality, mitigate risk and deliver value for money.

The geographic spread of care homes across South Gloucestershire varies considerably with significantly less choice in the more rural and north eastern areas of South Gloucestershire.

Fee rates are set individually with homes depending on a range of factors including locality, physical environment, quality and wider market conditions.

Council is taking a partnership approach to engaging with providers to assess market and cost pressures, safeguard and develop quality of services and monitor sustainability and viability within the sector.

South Gloucestershire's approach is to continue building on the progress made by working closely with the care home sector to promote quality, customer choice and value. This is in the context of the challenging financial climate and the continued emphasis on reducing traditional Residential Care services in favour of supporting people in the community and within Extra Care settings.

The focus of this partnership approach is through the s256 Care Homes project overseen by a partnership board with membership from the care home sector, CCG and Local Authority. Through this partnership we are seeking to invest in collaborative initiatives designed to improve quality, skills and outcomes across all care homes.

Direction and possible Business Opportunities.

- South Gloucestershire remains committed to Residential and Nursing Care where this is the most suitable option, for example where customers have a need for specialist support, such as dementia care and end of life care.
- In line with our way of working residential and nursing care homes will be encouraged to adopt a reablement / rehabilitation approach, seeking to promote a culture where individual's are supported to retain and regain independent living skills.
- There is likely to remain a particular demand appropriate residential and nursing care for people affected by dementia.
- There are some areas within South Gloucestershire with limited capacity to meet the demand for residential and nursing care, particularly along Severnside and the Thornbury area.
- All Care Homes in South Gloucestershire are encouraged to participate in and engage with the s256 project.
- We will be exploring the potential to work with providers of Residential and Nursing Care to develop step-down services to facilitate a more successful discharge from acute hospital settings for Older People, preventing hospital re-admission or permanent admission into Residential and Nursing Care in line with our reablement approach.

- South Gloucestershire will be exploring the potential for outcomes-linked models such as Payment by Results to stimulate improvements in quality, person centred care and embed a culture of reablement/ rehabilitation.

Conclusion and summary

This market position statement is intended to provide an overview of current thinking in relation to adult care services in South Gloucestershire, to highlight some of the opportunities and demands we have recognised and to encourage a dialogue with others. We recognise that it is only by working together with partners and people living in South Gloucestershire that we will achieve the best possible outcomes.

All business opportunities contained within this report must be considered within the context of significant budget pressures and planned reductions in funding for public services over the medium term. There is a need for commissioners and service providers to work more closely in the future to support the development of a sustainable market for people requiring support that encourages innovation and creativity, focuses on supporting people to achieve the things that matter to them and lead the life they choose while achieving required savings.

We wish to continue to engage with our partners to build a quality framework, to work together to ensure we can promote independence, choice and control for all. In addition to clear contract and performance monitoring and management arrangements we are exploring a range of new approaches to ensure the commissioning of quality, outcome based and value for money support services, we are particularly keen to ensure that people with experience of services are more actively involved in the design of services and monitoring the quality of support provided.

We welcome your comments about this Market Position Statement and in particular its value to you as a provider and how it can be enhanced in future versions. We are interested, particularly, in your views about how we continue to provide quality services that deliver real outcomes for individuals within a reducing financial envelope.

If you are a provider reading this and would like to know more then please contact us at cengagement@southglos.gov.uk

Finally thank you for taking the time to read South Gloucestershire's first Market Position Statement. We will continue to build and forge strong relationships with you so that together we can be proud of the services delivered.