

**Waltham Forest Council**

# Market Position Statement

for the registered care market

July 2016

## Why publish a Market Position Statement?

### Waltham Forest “By Autumn 2016 will have:”

- Published a Local Authority Adult and Older Person’s strategy.
- Published a Transforming Care Partnership plan to strengthen the support available to people with a learning disability and/or autism.
- Developed joint Council and CCG commissioning intentions that address in-year and medium term financial constraints.
- Commenced the delivery of an integrated Community Health Services contract for planned and unplanned care.
- Commenced the delivery of enhanced support to identified care homes within the borough.
- Designed an accountable care system involving care homes.
- Further developed our integrated care programmes, including our discharge to assess processes.
- Worked with our third sector and local people to change the face of volunteering in the borough.
- Specified our new “care closer to home pathways”, that form part of Transforming Care Together.
- Transformed our equipment service and changed our supplier.
- Strengthened the delivery of our Care Act responsibilities.

This is Waltham Forest’s first integrated Market Position Statement (MPS) for the registered care market, developed by the Council and Waltham Forest NHS Clinical Commissioning Group.

As commissioners, working together, the Council and the CCG wish to forge new relationships with their partners to benefit all who need support from the registered care market in the borough.

The commissioners have segmented the registered care market as follows:

- Care homes with and without nursing
- Services in service users and customers’ own homes (inc. Home care and Supported living schemes)
- Community based services

We recognise that care providers contribute to the economic growth of the borough and are therefore key partners in realising our ambition to become London’s leading borough to live, work and play.

Through this MPS, commissioners wish to stimulate a vibrant, diverse and evolving market so local people have real choice of provision. This may come from existing partners, whose work we value, those who currently do not work in the borough or new organisations.

The demographic information and strategic plans developed by the Council and CCG, will assist the adoption of a systematic approach to understanding and meeting future care and support needs; help to identify future demand and to act as a starting point for discussions with interested care providers.

## The future of integrated services in Waltham Forest

### Key statistics

- The population registered with a Waltham Forest GP in 2016 is 303,659 of which 29,487 are over the age of 65 year. *Source: Exeter system*
- Waltham Forest is home to an estimated 271,200 residents and 104,000 households. Of these, 28,000 are over the age of 65 year. *Source: ONS 2015 Population Projections*
- We are a young borough: the median age of residents is 34 years compared to the UK average of 40 years. However, similar to other places, our older population is the fastest growing group. *Source: ONS 2015 Population Projections & GLA Projections*
- Population projections indicate 13,500 additional residents between 2016 and 2020. Projected growth for those aged 65+ is 9% 2016-20 and 82% 2016 - 2040. *Source: GLA 2015 Round of Demographic Projections*

Waltham Forest recognises that demand for services is changing, as is the evidence base for the management of long term health problems and the criteria for eligibility to access adult social care services.

Waltham Forest Council and Waltham Forest Clinical Commissioning Group have described their strategic commitments and ambition is to transform public services in the following documents:

**Redefining Waltham Forest** and the **Think Family Strategy**, that strives to ensure that residents are: Safe, Well, Independent and Resilient. [Web link](#)

**Transforming Services Together**, that will change the design of Whipps Cross Hospital and change the provision of community based health and social care. [Web link](#)

**Health and Wellbeing Strategy** that describes our approach to early intervention and prevention. [Web link](#)

**Better Care Together Programme** that will oversee the delivery of the managed network of integrated care; improve the risk assessment and care coordination for people and their families whose care and support needs are complex or unpredictable. [Web link](#)

## The future of integrated services in Waltham Forest

### Key statistics

- Nearly half (48%) of residents are from a minority ethnic background and 37% of Waltham Forest residents were born overseas. Urdu and Polish are the most widely spoken languages after English. *Source 2011 census*
- Waltham Forest is currently ranked 35th most deprived borough nationally (of 326 LAs) which is an improvement from 15th in 2010. *Source: 2015 Index of Multiple Deprivation*
- In total, 3253 people in 2015 were accessing long term social care support, 1505 were over 65 years, 1748 aged 18- 64 years. *Source: Provisional SALT 2015/16 unpublished and subject to change*

### Adult Social Care Users

- Over 10,000 contacts were made to Waltham Forest Council in 2015 seeking adult social care advice and support. *Source: WF Adult Social Care Strategy.*
- In total, 3253 people in 2015 were accessing long term social care support: 1505 were over 65 years; 1748 aged 18-64 years. *Source: Provisional SALT 2015/16 unpublished and subject to change*

**Transforming Care Partnership** : that will replace long-term hospital care with community alternatives for people who have very challenging behaviour. [Web link](#)

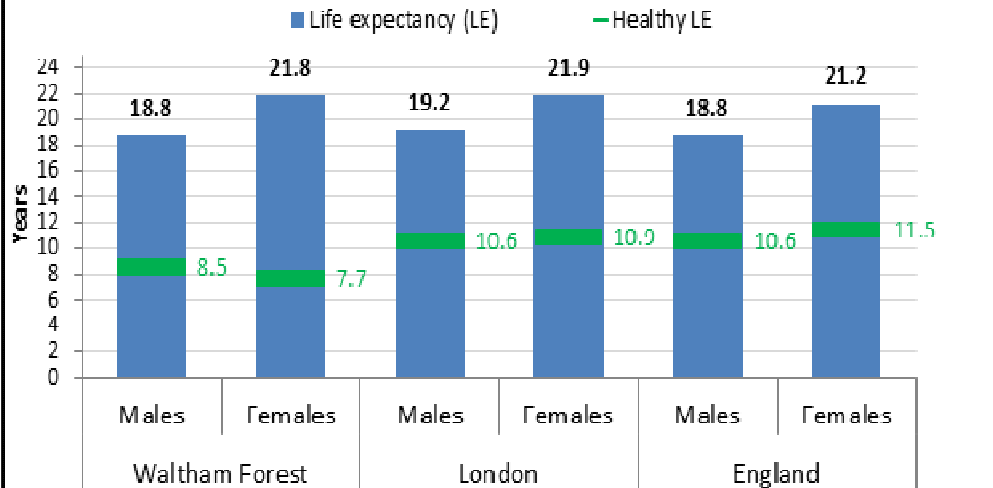
**Primary Care Strategy**: that will change the range of medical care available in the community, the locations it is provided from and the way it is integrated with other community based services. [Web link](#)

**Adult Social Care Strategy**: that will ensure that future care and support is focused on:

- maximising people's independence where ever possible;
- transforming day opportunities to increase social inclusion, maximise personal budgets and increase choice and control over care and support;
- increasing access to paid employment;
- improving support to unpaid carers by developing the "carers offer";
- supporting people with long term conditions to remain supported in their own homes and supporting young people in their families through transition into adult service and ensuring that services are designed with future needs in mind. [Web link](#)

## Key statistics

Life expectancy at age 65, 2012-2014 (Source: ONS)



This graph suggests that Waltham Forest residents are predicted to live as long as the London average but will experience poorer health.

## People accessing social care services in 2015/16

- 346 people aged 18 – 64 years and 1335 aged 65 plus received support for their physical or sensory needs
- 626 people with a learning disability aged 18- 64 years and 86 people aged 65 years plus received support
- 1040 people aged 18 – 64 years and 483 people aged 65 plus received support for their mental health needs
- 9 people aged 18 – 64 years and 157 aged 65 years plus received support for their memory or cognitive impairment needs

Source: Provisional SALT 2015/16 unpublished and subject to change

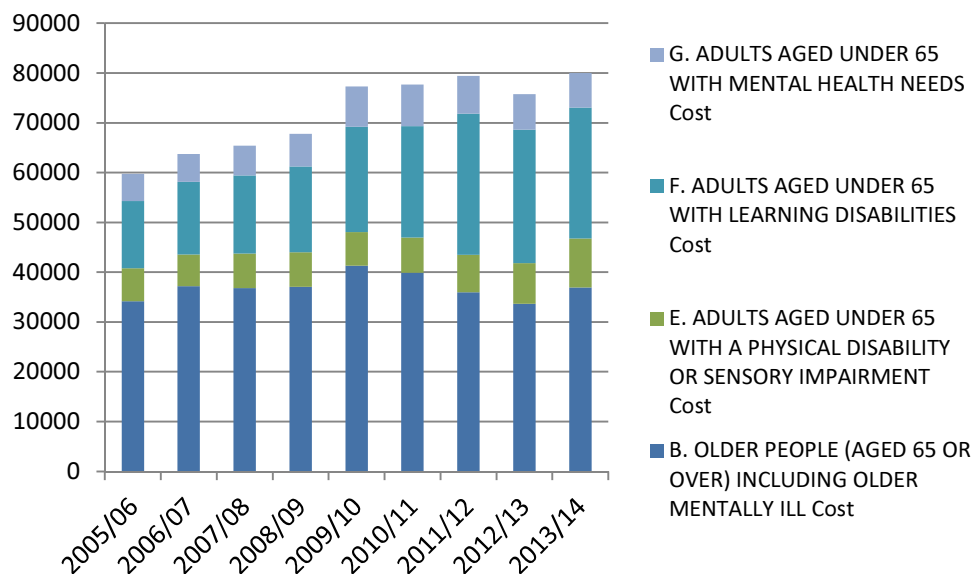


## Operating Environment

- Between April 2015 and February 2016 there were 5515 A&E attendances by people resident in care homes at a cost of £831,586. *Source: Waltham Forest CCG, performance report July 2016*
  - For people aged 65 years and over, the emergency hospital admission rate for people with dementia is high: 50 people per 1,000 population compared with 37 people per 1,000 across London and 33 people per 1,000 across England. *Source: PHE 2014/15.*
  - Between April 15 and March 16 there were 1174 journeys made by London Ambulance crews to care homes with and without nursing, 1011 (13.9% ) resulted in the resident going to hospital. *Source: LAS 15/16 incident reporting*
  - In 2015, over 1,318 people have a dementia diagnosis, 854 are living in a care home.
  - Prevalence of dementia is higher among the 65 years plus in Waltham Forest compared with the London average for this age group. *Source: PHE, Sept 2015*
  - Waltham Forest’s predicted rise in its population over 65 years will continue to pose a challenge to health and social care commissioning.
  - In 2014/15 Waltham Forest had an above average long-term client rate (clients per population) compared with similar London boroughs:
    - Age 18-64: 11 per 1,000 of the population in Waltham Forest, compared with comparator group average of 8 per 1,000 and an England average of 9 per 1,000.
    - Age 65 and over: 73 per 1,000 of the population in Waltham Forest (higher than the England rate of 63 per 1,000 – but lower compared with comparator group average of 87 per 1,000).
- Source: SALT Return 2014/15 Comparator Dashboard, published*



## Key statistics



Source: Cost of all client cohorts over time (PSS-EX1 data from Waltham Forest Resident Insight)

### Trends:

- The amount of money spent on adult social care per 100,000 population has not grown in the last 7 years and the financial grant received by the Council from central government will continue to reduce over the next 4 years
- The percentage of investment in services for people with Learning Disabilities is increasing
- Investment in Older People's services remains high but has fallen from its peak in 2009/10

Other key borough statistics can be found on our [website](#).



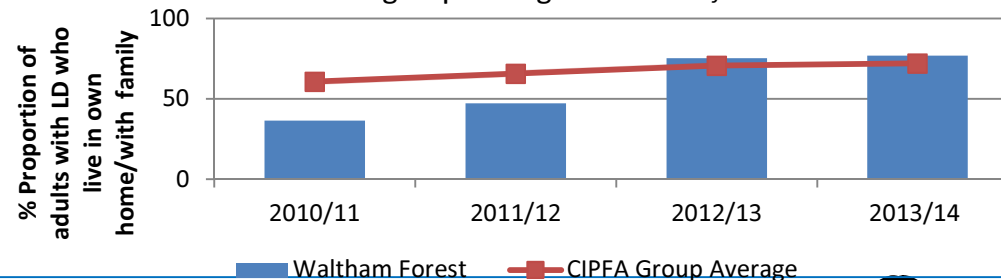
## Operating Environment

Public services play an important part in the economic growth of the borough. The employment provided by the local care market make a significant contribution to this growth.

Waltham Forest Council is responsible for the delivery of a range of registered care services and is subject to the same quality and value for money tests as other providers.

- Commissioners are aware that from time to time embargos are placed on local providers and improvement plans are issued.
- Commissioners wish to incentivise providers to:
  - develop innovative solutions to optimise the health and well being of local service users and patients
  - minimise the escalation of emergencies and crisis

Access to employment and settled accommodation are key markers of resilience and independence. Employment rates, in Waltham Forest, for people with Learning Disabilities are above the Chartered Institute of Public Finance and Accountancy (CIPFA) group average, but below the London and England average. This is also the case for all people known to Waltham Forest Council with a disability. *Source: LG Inform & Annual Population Survey Jan-Dec 2015.* For settled accommodation Waltham Forest is the same as the CIPFA group average *Source: LG Inform*



## What do commissioners want?

Services that are:

**person centred** and focussed on outcomes, able to promote health and well being and able to deliver social value

**inclusive** and are co-produced with local people, their carers and communities and can engage positively with other providers in order to promote equality

**are well led** and can adopt a whole system approach and offer services that are evidence based, high quality and safe

**diverse and sustainable** and are able to offer choice to the customer and delivered by a sustainable workforce that is competent

**value for money** and are able to demonstrate ongoing efficiencies

## What does good look like?

### What will local people expect?

- Good information and advice to enable them to look after themselves and each other, and get the right help at the right time as their needs change.
- The recognition that people supplying the service and the people using the service are interdependent and therefore collaboration is required to build supportive relationships and resilient communities.
- Services that help people get back on track after illness or support disabled people to increase their independence.
- Care and support, services that are personalised, of good quality, that address mental, physical, and other forms of wellbeing and are much better joined- up around individual needs and those of carers. Personal budgets are central to this approach.

### What might this mean to local people and organisations

Residents thinking ahead about the eventuality of their extensive care needs. This might include: financial planning and making changes to their home.

Organisations building on the range of innovations across the sector that have made information and advice more readily available and tailored to meet people's needs.

Organisations supporting informal carers and mobilising unpaid carers.

Organisations offering episodic treatment and care to assist recovery from illness and enabling access to employment for younger people, social interaction and independent living for all.

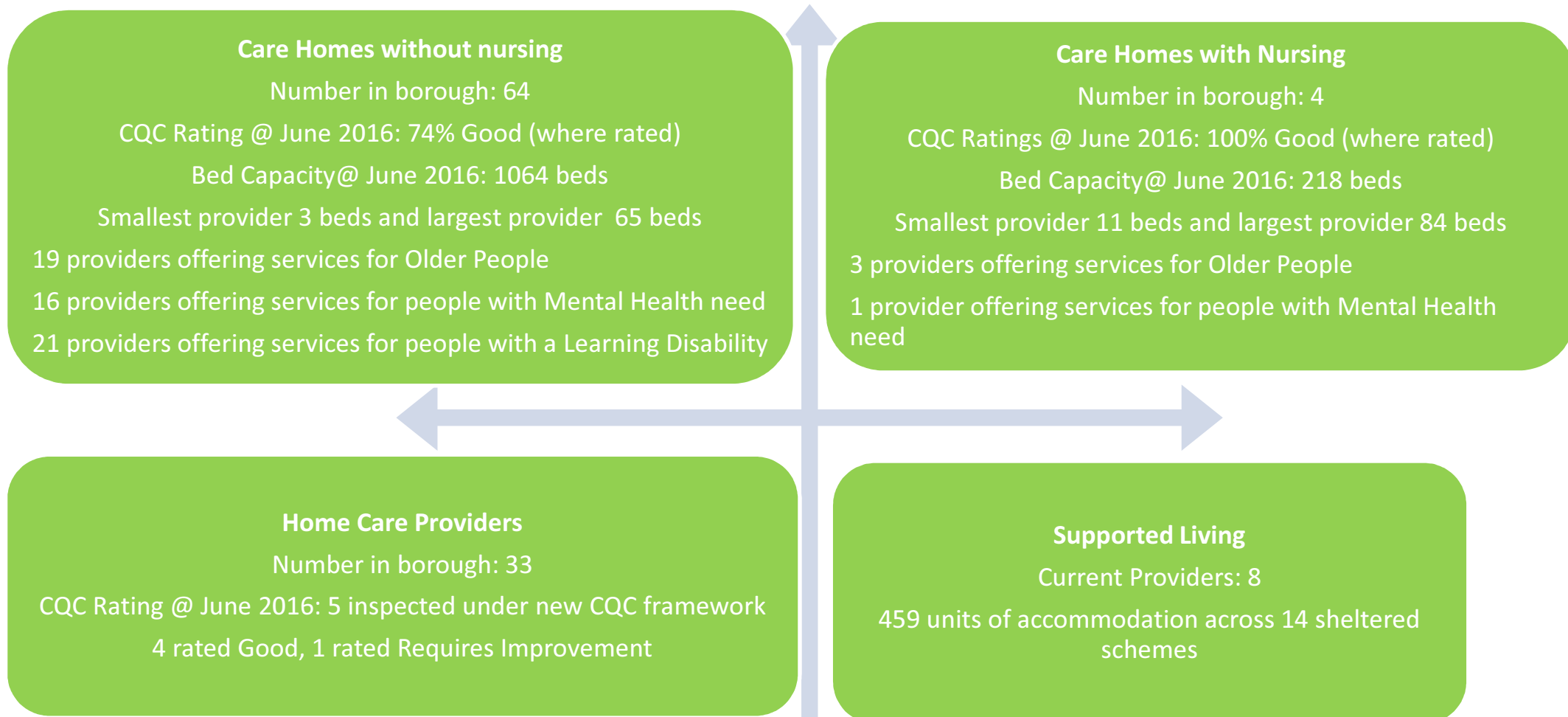
Services that are personalised, of good quality, and much better coordinated and joined-up around the needs of the individual, with a parity of emphasis on our physical, mental, and other needs. This will entail care coordination, integrated teams, shared assessment and records, and integrated personal commissioning.

Services are well led, with well trained workforce to provide effective, high quality, person centred care and support.

Source: ADASS- Distinctive, Valued, Personal: Whys social care matters the next five years

## Current Market Overview

The table below summarises the registered care provision in Waltham Forest. It is recognised, that Waltham Forest residents or people registered with a Waltham Forest GP will use registered services located outside the borough. It is the Council and the CCG's intention to publish, in the future, information about the "out of borough" provision.





## Waltham Forest Contracts

The table below sets out the council's current major contracts for registered Adult Social Care. Other services, such as Residential Care, are currently purchased by spot contracting arrangements. As part of the council's Strategic Commissioning Forward Plan, all service areas will be subject to review to ensure that there are appropriate contracts in place and that all arrangements offer value for money and deliver high quality services to our vulnerable residents. Such reviews will consider all available delivery models, including frameworks, block contracts and dynamic purchasing systems. Tendering opportunities will be published as currently via the London Tenders Portal.

Type	Provider	Start Date	End Date	Annual Spend	Opportunities
Homecare	Dynamic Purchasing System – Multiple providers	1 <sup>st</sup> Oct 2015	30 <sup>th</sup> September 2019	£6.5m pa	Apply for DPS via London Tenders Portal <a href="http://www.londontenders.org">www.londontenders.org</a>
Supported Living: Learning Disabilities	Framework – Multiple providers	April 2016	April 2020	£5.2m pa	No current opportunities
Older People Extra Care	Two providers	1 <sup>st</sup> Oct 2011	30 <sup>th</sup> September 2015	£0.545m pa	Expected to be re-tendered between October – December 2016
Older People – Sheltered Accommodation		1 <sup>st</sup> October 2013	30 <sup>th</sup> September 2016	£0.333 m pa	Expected to be re-tendered between October – December 2016
Mental Health	Framework – Five providers	1 <sup>st</sup> April 2015	31 <sup>st</sup> March 2016	£1.6 m pa	To be tendered in the second half of 2018/19

## Care worker fact file

### Care workers in Waltham Forest

3400 care workers  
Average hourly rate £9.15 an hour (London average £8.00)  
Statutory sector £11.51 an hour, Independent sector £6.90 an hour  
Turnover 16% (London average 25.6%)  
Vacancy rate 6.9% (London average 11.4%)  
21% aged over 55 years & 700 may retire in the next 10 years

### Training of Care workers in Waltham Forest

A rolling program of training to improve end of life care has commenced  
A targeted program of “Positive Behavior Support” to better meet the needs of people with challenging behavior has commenced.

### Registered care providers

107 registered providers in the borough  
84 registered managers in post vacancy rate 15% (London average 13.1%)  
Average pay £34,500 (Stat sector £39,900 & Ind. Sector £32,500)  
30% over 55 & 25 may retire in next decade

### Carers

Compared to the CIPFA group average, Waltham Forest has fewer carers supported by the borough and fewer carers claiming financial support from Department of Work and Pensions.  
Only 40% of WF carers receive direct payments or self-manage their support – compared to 92% in Haringey.  
The Family Resources Survey has illustrated that, even 12 years after implementation only about 60% of people who are eligible actually claim Carer’s Allowance (nationally).

Service Area	Current position	Priorities
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Learning Disabilities

**Care homes with and without nursing**

- We currently spend £13,788,606 - (15/16) on residential placements, 123 placements at a value of £9,540,167 are made outside the borough of Waltham Forest
- This accounts to 26% of the people who use this service, most of whom are between the age of 18-64 years
- There are currently 10 placements by the specialist commissioning team for NHS England.
- We have completed a comprehensive review of these placements and at the last review, 5 people were identified as suitable to move back to the borough and 5 more had already identified a local provider.

**Residents' own homes**

- We spend £305,908 on home care for people under 65 years who have a learning disability
- Over 75% of LD service users known to ASC, live in their own home or with their family.

**Direct Payments**

- There were 123 recipients of direct payments; 159 recipients of part direct payments, 182 CASSR managed personal budgets, *2015/16 SALT return for people 18- 64 years*
- The value of direct payments in 2015/16 was: £1,102,604 for people eligible for continuing health care; £2,405,074 for people aged 18-64 years; £804,702 for people in transition from children's to adult services.

**Care homes with and without nursing**

We wish to work with local providers, people with a learning disability and their families and carers to :

- reduce our reliance on residential services
- to decommission some "distant" provision
- Develop the local offer that is currently based on a system of spot payments
- Consider the value of a Dynamic Purchasing System as well as block contracts.

**Residents' own homes**

We wish to work with local providers, people with a learning disability and their families and carers to :

- Increase the diversity of services available in residents own home and the community
- Develop service specifications that ensure delivery of
  - an agreed service model
  - a culturally appropriate service
  - contingency or crisis plans
  - access to paid employment
- Increase the capability of the workforce so that Positive Behaviour Support is routinely available
- Develop provider workforce collaborations so that client support teams can be assembled at very short notice
- Enable providers to be able to make changes to the clients "care environment" to better reflect changes in health and/or social needs
- Develop services that enhance the contributions of unpaid carers (including older unpaid carers)
- Increase the resilience of services available in residents own home and community

Service Area

Current position

Priorities

Older People  
Including  
dementia

**Care homes with and without nursing**

- Average of 146 monthly service users receiving care via the Council; 35 receiving residential, 111 nursing and 109 receiving dementia care
- £3,766,738 was spent in nursing homes 2015/16 by LBWF
- £4,793,525 was spent in residential homes in 2015/16 by LBWF
- Older service users represents the largest spend in nursing, amounting to an £3,356,957 from the CCG (140 service users)
- Numbers admitted to residential homes are gradually declining in line with CIPFA average as at 2013/14

**Residents' own homes**

- £4,928,087 is spent by London Borough of Waltham Forest on homecare services (not in-house provision) for people over 65years while £944,000 is spent on in-house provision
- A further £1,256,218 is spent on service users living in supported living accommodation

**Community**

- A further £1,267,000 is spent on OP receiving day care services in the community

**Direct Payments**

- In 2015/16, there were 222 recipients of direct payments
- These recipients received a combined total of £2,112,852

**Care homes with and without nursing**

- Currently our residential placements are done on a spot-contract basis, but we would welcome a conversation with the market in order to explore other models, e.g. a Dynamic Purchasing System, or Large Volume block contract.

**Residents own homes**

- A Dynamic Purchasing System is already in place for Homecare, which potential suppliers can apply to join via the London Tenders Portal
- Supported Living framework to be rolled out to include people aged over 65 years
- We would welcome discussions with providers about how they might work together to form workforce collaborations so that home care support teams can be assembled at very short notice to support service users
- We have a high demand, across the borough for double handed care packages. We would welcome a conversation with the market on how this demand might be managed more effectively.
- We are aware of the provision gap in Chingford. We would welcome a conversation with the market on how this gap might best be addressed.

**Community**

- Opportunities will exist for providers to extend their offers as the number of service users that receive direct payments increases. We would welcome a conversation with the market about how they might diversify their offer.

Service Area

Current position

Priorities

Mental Health Excluding dementia

**Care homes with and without nursing**

- £2,013,830 was spent in residential care settings by LBWaltham Forest for people aged 18-64 who have a mental health need.
- Further £285,094 was spent by the CCG, specifically on nursing provision (CCG data states they have 8 service users but not separated-by-service)

**Residents' own homes**

- £2,674,000 spent in supported living, and a further 425,590 in homecare.
- CCG spent £8,040 on domiciliary care for people with functional mental health

**Community**

- £322,000 spent on day opportunities by the Council

**Direct Payments**

- In 2015/16, there were 88 recipients of direct payments, receiving £596,049
- 17.3% of mental health service users known to social care receive self-directed support, compared to the London average of 34.5%. The London Borough of Redbridge have achieved 67.4%
- Prevalence of all types of common mental health disorders for Waltham Forest residents 16-74 years is at or slightly above the London average.

We would welcome a discussion with providers in order to develop an approach to decommission long term "Care homes with and without nursing" placements where service users are resistant to recovery.

We would wish to increase the commissioning focus on services that:

- Improve recovery and rehabilitation
- Increased uptake of employment
- Increased life skills
- Sustained tenancy

We would wish to increased options for

- Supported living
- Floating support
- Support packages delivered in service users own homes

Increased commissioning of Community based options that make "high street" facilities more attractive and inviting for people with mental health needs.

Increase the connectivity between the 24/7 specialist MH services and support options in the community.

Supported Living framework to be rolled out to include people over the age of 65 years

We wish to test the benefit of intensive high level support packages in the community that then reduce in intensity over time

Develop provider workforce collaborations so that support teams can be assembled at very short notice

Service Area	Current issues	Priorities
<p>Physical/sensory disability</p>	<p><b>Care homes with and without nursing</b></p> <ul style="list-style-type: none"> <li>£1,254,493 is spent in residential care homes and £175,525 on nursing care homes by the Council</li> <li>A further £2,647,475 is spent by the CCG on 95 service users.</li> <li>All service users receive services externally from private providers</li> </ul> <p><b>Residents' own homes</b></p> <ul style="list-style-type: none"> <li>CCG spent £1,670,251 on domiciliary care in 2015/16</li> <li>The Council spent £718,000 on homecare provision</li> </ul> <p><b>Direct Payments</b></p> <ul style="list-style-type: none"> <li>In 2015/16, there were 173 recipients of direct payments receiving £2,506,463 from the Council</li> </ul>	<ul style="list-style-type: none"> <li>We have recently let a Home Improvement Contract, so would not be looking to re-tender in the near future</li> <li>We would welcome the opportunity to talk to providers, service users and their families/carers to consider how we might develop cost effective community support systems, including supported housing units, and further reduce care provided in care homes (with or without nursing).</li> <li>We wish to work with local providers, people with a physical or sensory disability and their families and carers to :             <ul style="list-style-type: none"> <li>reduce our reliance on residential services</li> <li>to decommission some "distant" provision</li> </ul> </li> </ul>

Service Area	Current position	Priorities
<p><b>General comments</b></p>	<p><b>Care homes with and without nursing</b></p> <p>Recent changes have been made in a small number of care homes that will strengthen the support available to residents when they experience a medical emergency. Enhanced care is brought to the resident in the home, rather than the resident being transferred to hospital.</p> <p><b>Services in service users and customers' own homes</b></p> <p>Three organisations provide the majority of Supported Living services for local people. The commissioners would wish to ensure that this arrangement offers choice and diversity to service users and doesn't expose commissioners and service users to unreasonable risk if there is a loss of confidence in these organisations.</p> <p>34% of residential nursing care is provided by 2 organisations.</p> <p>40% of residential care is provided by 20 organisations, only 4 providers have an income from Waltham Forest of over £500,00. 1 provider supplies over 4% of this service.</p> <p>Commissioners are aware of the pressures placed on providers to meet national and local quality, policy and legal requirements that threaten the resilience and sustainability of local provision.</p> <p>The workforce is the market's greatest asset and ensuring its development to deliver the emerging models of care and support is essential.</p>	<ul style="list-style-type: none"> <li>• We would welcome the opportunity to talk and exchange views with the registered care market to:             <ul style="list-style-type: none"> <li>• ensure Waltham Forest is a place that people want to live and work</li> <li>• develop integrated and consistent standards of care provision regardless of the commissioner</li> <li>• improve the supply of packages that in the first instance offer complex and intensive care, often following a hospital discharge.</li> <li>• expand the local provision of the "shared lives" scheme ( a type of foster care/ support for adults and older people) to support emergency provision in the community</li> <li>• ensure the sustainability of local providers</li> </ul> </li>   <li>• Work with the Council's Housing team to review opportunities to access general housing stock and make adaptations</li>   <li>• We would welcome the opportunity to talk and exchange views with the registered care market to ensure that clients' accommodation can be adapted to reflect changing needs.</li>   <li>• Our expectation is that providers will want to enable service users to the world of work, exercise the civil rights</li> </ul>

The London Borough of Waltham Forest and Waltham Forest NHS Clinical Commissioning Group see this Market Position Statement as one of many ways to talk to providers of registered care.

The Council and CCG commissioners are committed to the development of regular updates to this MPS and to consult with partners about the usefulness of the statement to enable them to plan their future services.

If you would like to discuss how your services might help the Council and CCG commissioners to achieve the outcomes described in this MPS, please contact:

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