



Market position statement – older people’s services

2024/25-2029/29

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Version control

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FOREWORD

Welcome to this market position statement for services commissioned by Trafford Council adult social care directorate for local residents who are older people.

This statement is intended to assist providers in shaping their strategic and commercial business planning over the next five years, by providing them with intelligence as to the Council's purchasing intentions both in relation to the types of services that are required, but also the values, principles and approaches all services should be built upon.

The market position statement has been prepared on behalf of Trafford Council with input from the all-age commissioning team, from providers themselves, and from key stakeholders especially partners in NHS Greater Manchester.

The statement will be reviewed on an annual basis and providers are encouraged to use the existing engagement structures, including the various provider forums, to contribute to these reviews.

On behalf of the directorate, we look forward to working with you over the next few years.

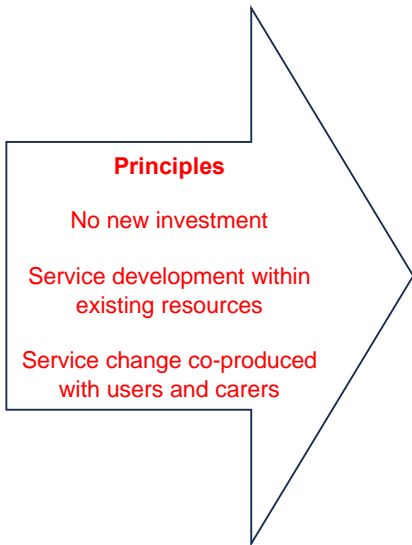
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EXECUTIVE SUMMARY

**Trafford in 2024/25
Key issues**

- Very challenging financial position
- Population growth
- Provider costs increasing
- Increases in complexity of need
- Recruitment and retention challenges
- Significant numbers of service users placed outside of the borough



Market position statement summary action plan				
2024/25	2025/26	2026/27	2027/28	2028/29
Recommission stabilise and make safe service Awareness raising and training to encourage take up of personal budgets Care home fee review Retender of extra care and establishment of FPS for care home beds	Recommission homecare framework	Review of opportunities for respite care services	Commence preparation for next market position statement	Increase housing with care units by 724 (by 2030) Increase in purchasing of nursing care beds by 50+

A. INTRODUCTION AND BACKGROUND

1. Purpose and context

This market position statement sets out Trafford Council's expectations for the commissioning of adult social care services for older people for the five-year period 2024/25-2028/29.

The context in which this position statement has been prepared, and the overall aims and objectives of the Council in its adult social care commissioning role, have been set out in the adult social care commissioning strategy, which also covers the period 2024/25-2028/29. This strategy should be consulted by readers of this market position statement.

In essence, the Council's financial position over the lifetime of this market position statement is likely to be very challenging. This means that any new services that are commissioning must be funded either from one-off grants from central government, or by the transformation and de-commissioning of existing services. Any exceptions to this will need the approval of the corporate directors of adult services and finance. One-off grants are, by their nature, unpredictable: in the event of such grants being available, they will be used to take forward relevant areas of this market position statement.

The transformation and de-commissioning of existing services can, of course, be challenging. However, it can also present important opportunities to move away from out dated services and ideas to better, more personalised and person-centred services, and also to services which make better use of technology and other forms of innovation. Trafford Council's adult social care directorate welcomes and wishes to support providers who have enthusiasm and commitment to introducing innovation where doing so both improves the personalisation of services and reduces their overall cost.

2. State of the current market

The current market in Trafford for services for older people is mixed. The descriptions below examine the market and some of the factors which affect it, before drawing conclusions for the Council's management of the market in the future.

2.1 Service users: changes in need and demand

The population of Trafford was estimated to be 235,100 in 2021. Of these, 41,297 were people aged 65 and over (approximately 17.6%). Estimates by the Projecting Older People's Population Information System (POPPIS) suggests that in 2030, one year after the conclusion of the timeframe of this market position statement, there will be 48,100 people aged 65+ in the borough, with the largest increase being in the 80-85 category.

In 2021-22, Trafford adult social care services provided care to 2,425 people aged 65 and over, this amounts to 1% of the overall population and approximately 5.9% of the

population of older people (65+). There were, on average, 1,545 people receiving long-term support at any one date.

On the basis of straight-line growth and a 'do nothing' scenario, by 2029, Trafford adult social care services will be supporting 2,476 older people. However, this figure is almost certainly an underestimate because of the differential growth in different age groups, including (as noted) the growth in the numbers of people aged 80-85.

Population change and need, in addition, will most likely not be even across the wards and neighbourhoods in the borough. As a general working assumption, it is appropriate to anticipate that residents in the more deprived boroughs will enter into ill health earlier in age, and that their life expectancy will be lower than those living in less deprived boroughs. The commissioning of neighbourhood services will need to continue to take into account the specific population characteristics in each part of the borough.

Additionally, considerably increased demand has been noted by Trafford commissioners arising especially from hospital discharge arrangements. Prior to the Covid-19 pandemic, the adult social care commissioning team was managing 5-10 discharges per week. Since the pandemic, this is the number of people being discharged from hospital in need of a commissioned service or further assessment, every day.

2.2 The provider landscape

Providers in the older people's market offer, amongst other services:

- Extra-care supported living
- Residential and nursing care
- Day services
- Homecare services

There is no overall analysis of market share in older people's services. However, such analysis would be of limited value as many providers serve more than one borough and so market share may differ from place to place. The analysis that is available, provided by the Association of Directors of Adult Social Services, indicates that the providers which receive the largest shares of fees in older people's services (as at 1 September 2023) are Maria Mallaband Countrywide, and Kingsley Healthcare.

Older people's services are purchased in a variety of ways: as commissioned services, as spot purchases, and in arrangements with other commissioners or providers.

2.3 Investment and value for money

Older people's services consume the largest proportion of the Council's adult services budget (£32m in 2022/23), and this expenditure (gross) has grown by 10% since 2016/17. The Council and its partners have successfully implemented a Home First programme, which emphasises the provision of care in a person's own home, rather than in a more institutional setting such as a care home or a care home with nursing. The Home First programme also plays a critical role in Trafford's arrangements for

hospital discharge. Homecare providers are generally agreed to have been effective at helping older people stay at home for as long as possible, and other important contributions have been made by extra care housing and by specialist teams from the NHS.

2.4 Sustainability and market failure risk

A number of issues regarding market failure risk and sustainability have been identified in the course of preparing this market position statement.

First, there is a risk to some homecare providers arising from a combination of pricing for service provision, underlying liquidity, staffing recruitment and retention and quality expectations within the market. A small number of homecare providers have exited from the homecare market for these, and other, reasons. However, on the whole, the homecare market is resilient and there is a wide choice of provision. The Council has taken steps to improve resilience, e.g., by enabling providers who initiate the 'stabilise and make safe' service to continue to provide care where this is assessed as required after the initial service has run its course of 21 days. The Council will continue to work with providers in this, and all other segments of the market, to explore ways of increasing resilience without losing the benefits of a dynamic and flexible market place.

Second, there is a risk in relation to care home provision that the Council's care home fee structure does not provide adequate income to cover costs and to maintain standards of care. The Council is committed, through this market position statement, of 'squaring the circle' between the relatively high costs the Council is paying for care homes and the need for the market to remain resilient and dynamic.

Third, the Council acknowledges that there are other pressures on providers in the markets covered by this position statement. These pressures include:

- Increases in the national and real living wage over time
- Recruitment and retention challenges for workforce
- Access to capital
- Ability to obtain planning permission for modifications to buildings and for new build
- Costs arising from competition in public sector procurements

These factors, together with more specific local or organisational factors, can have an impact on providers' willingness and ability to maintain service levels and indeed, to stay in the social care market altogether. The Council will remain vigilant about the risk of market exit or market failure, and will regularly seek intelligence from providers about changes to the risk profile.

2.5 Quality assessment

Trafford care home providers (all client groups) present a positive picture in relation to quality. Data from MQIS, the regional social care database, at 1 September 2023 shows that 16.1% of care home beds purchased by Trafford Council were in providers rated as Outstanding by the Care Quality Commission, and 76.9% of beds were in care homes rated as Good. Only 7% of beds commissioned by Trafford adult social

care directorate were in care homes rated as Requires Improvement. It is perhaps noteworthy that the same dataset from MQIS shows that, for all care homes where there are Trafford residents, 91% of staff are permanent and only 1% are from agencies.

The Council will continue to work closely with the Care Quality Commission, and with NHS Greater Manchester where appropriate, to safeguard and improve the quality of services which it commissions, with the aim of ensuring that every regulated provider in the borough providing services to Trafford residents is rated as at least Good by the CQC.

2.6 Outcomes

The Council is introducing outcome-based measures in some contracts with providers in the social care market generally. The use of outcome measures will be extended during the lifetime of this market position statement and the Council is committed to ensuring outcome measures are co-produced with service users and carers. The Council welcomes expressions of interest from providers to trial new forms of outcomes-based contracts as they are developed over time.

2.7 Gaps, undersupply and oversupply now and in the future

A duty placed on the Council by the Care Act 2014 is to 'prevent, reduce and delay' the development of need for social care services, by strengthening independence, building on service users' and communities' assets and strengths, and by co-operating with others to prevent ill health. As already noted, the Council's Home First programme has been very effective in maintaining older people in their own homes for as long as possible. The Council will continue to strengthen its Home First programme and build on its success to date.

There remain further areas, however, where the Council can help prevent need for adult social care services in the future, whilst ensuring that vulnerable and frail older people receive the care that they need. Particular gaps identified by the market position strategy include the following:

Shortage of nursing home beds

There is general agreement that there is a shortage of nursing care beds, including specialist dementia nursing care beds, for Trafford residents. This is a national issue. There is a general view that approximately 50+ additional beds may be required over the lifetime of this strategy.

There is also general agreement that there is a need for increased capacity in extra care housing, and indeed there is interest in a home's-for-life model whereby all-purpose facilities could be developed that offered a range of provision from extra care housing through to nursing care, which would meet the needs of older people throughout the course of their lives.

Reablement

The Council currently commissions a reablement service, known locally as the stabilise and make safe service (SAMS), which is purchased on a block, 21-day basis, from home care providers but this is seen as not always supporting the cohort of people it was intended for. Recent changes to the contracting arrangements mean that a provider who has provided the stabilise and make safe service, will go on to provide the client with homecare services, if they are assessed as needing them. This change is perceived by commissioners as supporting stability within the homecare market. The Council intends to recommission the SAMS service starting in 2024 and this recommissioning will include a rebranding to move away from the SAMS concept towards re-ablement as a key part of short and long-term homecare.

At present there are plans for enhancing the SAMS discharge services by access to therapies, by working more closely with Trafford crisis services provided by the Trafford Local Care Organisation, that have been shown to be effective in reablement services elsewhere. Recruitment and retention of community therapists remains a challenge in Trafford as in many other parts of England.

Discharge to assess

In 2017, the Council established discharge to assess beds in a number of care homes, including Ascot House, which is the home of the intermediate care service. Some stakeholders regard this development as a reduction in the number of residential and nursing care beds available in the Trafford system, but as the level of vacancies in all care homes in Trafford has run at an average of 123 during 2023/24, it seems unlikely that this concern is well-founded.

Fees for care homes

The fee arrangements for care homes in Trafford is seen in some quarters as problematic, both as fees relate to the Council and to NHS Greater Manchester. A review of fee arrangements, and possible disincentives to providers to checklist residents under the NHS continuing healthcare arrangements, will be undertaken by the Council, starting in 2024/25. The review will build on the work the Council has already done on the Fair Cost of Care and work associated with the Market Sustainability and Investment Fund.

The review will also consider the potential impact high levels of self-funders have on the cost of care in Trafford, as there is good local evidence that Trafford attracts higher proportions of self-funders than most other Greater Manchester boroughs, and this high proportion has an inflationary impact on the overall cost of care.

The latest (2020-23) data from the Office of National Statistics indicates that 44.3% of care home residents in Trafford are self-funders, which compares with an England

average of 37% and a North West average of 30.2%. Trafford's proportion of self-funders in care homes is the highest in Greater Manchester¹:

Greater Manchester borough	Percentage of self-funded residents in care homes
Bolton	29.2
Bury	29.5
Manchester	14.0
Oldham	24.6
Rochdale	24.3
Salford	20.9
Stockport	43.4
Tameside	26.3
Trafford	44.3
Wigan	20.9

Top-ups/exceptional payments

A factor which appears to add significantly to Trafford Council's cost profile in regard to care home beds is the frequency and value of top-ups/exceptional payments in residential and nursing care in the borough.

Housing with care including extra care

Analysis completed for the Greater Manchester Combined Authority in 2023 indicates that Greater Manchester has a requirement for significant additional housing with care units.. The modelling suggests that in Trafford, against a baseline of 200 units specifically for older people, by 2030 there will need to be 924 units, an increase of 724 (362%). The Council is already working with a developer on a proposed development in Stretford of 70/80 units extra care, and with Irwell Valley on a proposed extra care development of about 30 units. The Irwell Valley will come on stream in the next 18-24 months.

Taking into account these and other issues explored in the strategies listed above, the commitments within this commissioning strategy in respect of older people are as follows:

- Subject to the availability of resources, the Council will look to expand the number of care home beds with nursing that are available for its residents during the lifetime of this strategy. The Council will aim to work with other

¹ Office of National Statistics, *Care homes and estimating the self-funding population, England: 2022 to 2023*

(<https://www.ons.gov.uk/peoplepopulationandcommunity/healthandsocialcare/socialcare/datasets/carehomesandestimatingtheselffundingpopulationengland>) accessed 23 January 2024

commissioners including NHS Greater Manchester and Greater Manchester Mental Health NHS Foundation Trust, to achieve this.

- The Council will seek to remove the disincentive currently in place for providers to conduct checklist assessments for NHS continuing healthcare for residents.
- The Council will re-tender its homecare service in 2024.
- The Council will ensure that all residents of nursing homes (in the first instance) are check-listed for NHS continuing healthcare by the end of 2024. The Council will ensure social care assessments are prepared for each resident who is found to require a full NHS continuing healthcare assessment, and will fully participate in the resulting multi-disciplinary team meetings.
- Subject to the availability of resources, planning and other constraints, the Council will look to develop additional housing with care including extra care housing for older people up to a maximum of 924 units by 2030.
- The Council has co-produced a specification for the retender of extra care support and the establishment of a flexible purchasing system (FPS) for care home beds which will enable the Council to commission innovative models of care to meet unmet need in a responsive and transparent way. This retender and FPS will be initiated in 2024/25

3. Key issues raised by providers

3.1 Key challenges raised by providers in consultation on this market position statement as follows:

3.1.1 Funding arrangements including the Fair Price for Care system

3.1.2 Recruitment and retention of staff

3.1.3 Challenges arising from the level of complexity of need of local authority funded service users, perhaps as a result of the impact of the Home First programme. Service users entering the care market (i.e., especially the care home market) are often very frail or present with very challenging behaviour, and typically enter the care market at a time of crisis. Funding arrangements, demands on skill mix and the impact on other residents are some of the factors that arise directly from these cases.

3.1.4. Every increasing bureaucratic burden and duplication of effort with, for example, multiple reporting streams where providers have to submit the same or similar information

3.1.5 Local Planning guidance can be an obstacle to development and innovation.

3.2 Whilst the Council has heard reports from both providers and from NHS Greater Manchester that disincentives exist for care home providers to put residents forward for completion of an NHS continuing care check, this is not a view

shared by all providers. The Council is committed to removing any such disincentive as it runs counter to individual residents' rights, but will explore this issue further with providers and NHS Greater Manchester before finalising its plans.

B. COUNCIL'S REQUIREMENTS AND EXPECTATIONS OF PROVIDERS

The Council needs providers within the adult social care market who can actively contribute to the achievement of key corporate and directorate priorities. Key issues in which providers should be able to demonstrate measurable contributions are as follows:

1. Resources

Providers should demonstrate that they make best use of the income they receive from the Council. Processes should be person-centred, efficient and productive. Duplication and failure demand should be eliminated.

2. Technological innovation

Providers should demonstrate their willingness to be at the leading edge of applying technological innovation, building on Trafford's work to date, e.g., with the Genie robot.

3. Workforce

Providers are expected to pay all relevant staff the national living wage and to support the delivery of the Council's Poverty Strategy. Providers are expected to operate as attractive employers within the market, and to minimise vacancy rates. Providers should have active staff engagement programmes including regular staff satisfaction surveys.

4. Climate change

Providers are expected to contribute actively to the Council's carbon reduction (net zero) programme and to be engaged as partners in the Council's approach to the climate emergency.

5. Population demographics

Population changes, and consequent changes in demand and need are predictable to some degree and the Council's predictions underlie the commissioning intentions in this market position statement. However, population changes and changes in growth and demand can also be subject to unforeseen influences (the Covid-19 pandemic being a very obvious one) and therefore providers, and the Council, need to retain a degree of flexibility about commissioning intentions and the shape of care provision in the future.

6. Changing model of commissioning

The Council is, of course, not the only commissioner of services for older people. NHS Greater Manchester is the statutory commissioner of healthcare services and increasingly commissioning is also undertaken through or alongside partnerships of organisations, including the Trafford Local Care Organisation. Much of the commissioning undertaken by NHS Greater Manchester relates to Greater Manchester as a whole, so the role of the Council as the body which has, by law, its focus on Trafford is particularly important in ensuring that commissioned services meet the specific needs of local people.

Over the course of this market position statement, it is likely that commissioning will continue to evolve. There is likely to be more and more involvement by providers, service users, carers and voluntary and community organisations in co-designing services. At the same time, the financial position of commissioners as a whole is likely to remain very challenging over the course of this market position statement.

The Council is committed to working constructively and positively with NHS Greater Manchester and with all groups with a role in commissioning and in keeping providers up to date with any major changes or developments that affect its commissioning in the future.

NB. Further information on the connections between NHS Greater Manchester strategic goals and those of this strategy are set out in section A.7 of the adult social care commissioning strategy.

7. Co-production

The Council wishes to ensure that, where changes to services are planned, or new services are being developed, this work is done in partnership with providers as far as legislation permits, and that all material changes are co-produced with service users and carers using the Council's agreed co-production methodology.

C. SUMMARY OF COMMISSIONING INTENTIONS

1. Older people's services

The Council anticipates pursuing the following commissioning intentions during the lifetime of this market position statement.

Ref.	Service	Commissioning intentions (summary)
1	Assessment and care management including reference to Let's Talk and Trafford's 3-conversation model and links to community hubs	Assessment and care management will continue to be focused on an assets-and-strengths based approach, underpinned by training and professional development. Trafford will continue to utilise the Let's Talk approach together with its 3-conversation model Assessment and care management will be strongly linked to community hubs albeit specialist social workers

		will be an important part of Trafford's social care service throughout the lifetime of this market position statement.
2	Homecare	The Council aims to recommission its framework for homecare services during 2025/26. It will aim to use a new outcomes-based contract which will be co-produced with service users.
3	Day care	The Council will conduct a review of opportunities in relation to day care services during 2024/25, working closely with service users, with the objective of developing a new, more personalised and individualised model that better supports users to access education, training and employment where this is relevant. For older people's day services, the emphasis will be on maintaining independence and quality of life in a personalised, individual manner.
4	Residential care	The Council will continue to promote Home First as the core of its approach to the commissioning and provision of social care. This means that the Council does not envisage any growth in the residential care sector over the lifetime of this market position statement, save in respect of demographically driven demand. The adult social care directorate notes that both recent (2019 and 2023) housing needs assessment forecast significant increases in residential care demand, associated with demographic change. These forecasts do not take into account the continued implementation of the Home First approach.
5	Nursing care	<p>There is a regional and national shortage of nursing care services for older people with dementia and other complex needs. Subject to the availability of resources and effective joint commissioning arrangements with NHS Greater Manchester, Trafford Council anticipates purchasing approximately 50+ further nursing care beds over the lifetime of this market position statement.</p> <p>The Council notes the desire of Greater Manchester Mental Health NHS Foundation Trust to expand the existing challenging behaviour unit by a further 4 beds. The Council is committed to working with the Trust and NHS Greater Manchester to explore the possibilities for achieving this aspiration.</p>
6	Rehabilitation and re-ablement	The Council currently commissions a stabilise and make safe (SAMS) service. The Council intends to recommission the SAMS service starting in 2024 and this recommissioning will include a rebranding to move away from the SAMS concept towards re-ablement. The

		recommissioning will be for all client groups including older people.
7	Intermediate care	<p>The Council does not plan any change to intermediate care services which would have an impact on this client group.</p> <p><i>Ascot House</i></p> <p>The Council and NHS Greater Manchester are currently considering a joint review of Ascot House, Trafford's intermediate care facility, as part of the continuous improvement to our discharge from hospital processes.</p>
8	Hospital discharge (discharge to assess)	The Council does not plan any change to hospital discharge services which would have an impact on this client group. However, hospital discharge arrangements are periodically the object of new, short-term, funding from NHS England. The Council will work closely with Manchester University NHS Foundation Trust and with NHS Greater Manchester to optimise the value and benefit to local people of any such grant made during the lifetime of this market position statement.
9	Supported housing/supported living/extra care	The Council wishes to expand the range of extra care housing units available to local residents, e.g., as a further alternative to residential care. The Council welcomes outline proposals from providers to develop such services within the borough, for purchase within the terms of the Council's fee framework. The Council has an ambition to purchase up to 724 additional units of housing with care by 2030 (giving a total of 924).
10	Personal budgets	The Council will run an awareness raising programme following by a training and education programme, to encourage the take-up of personal budgets for all client groups.

2. Care home fees

The fee arrangements for care homes in Trafford is seen in some quarters as problematic, both as fees relate to the Council and to NHS Greater Manchester. A review of fee arrangements, and possible disincentives to providers to checklist residents under the NHS continuing healthcare arrangements, will be undertaken by the Council, starting in 2024/25. This review will cover all client groups.

3. Council's approach to working with providers

Trafford Council very much values providers who offer high quality social care services at an appropriate price, to local residents. Trafford Council adult social care directorate will:

- Continue to develop means of engaging with providers on a regular basis to share ideas, hear concerns, and address practical and strategic issues
- Continue to work with the STAR procurement service to respond to providers' feedback regarding procurement processes. The Council will take appropriate opportunities arising from the new Provider Selection Regime to use different procurement routes where to do so meets the criteria of the regime.
- Continue to support providers to address key corporate objectives including education and training, employment opportunities, the development of cultural assets within the borough, the net reduction in carbon emissions and the promotion of equality, diversity and inclusion at all levels within society.
- Increase the direct connections between providers and the all-age commissioning team, by encouraging direct contact between commissioners and providers to resolve problems and challenges more quickly, and to support innovation.
- Continue to keep fees under review, whilst acknowledging both that providers face rising costs and that the Council's financial position is likely to remain highly challenging throughout the lifetime of this market position statement

4. Review

This market position statement will be reviewed on an annual basis and a refreshed and revised version will be prepared for the five-year period starting in 2029/30.

March 2024

Annex

Trafford's all-age commissioning team



All Age Commissioning Structure – April 2024

