



# Essex Adult Social Care Market Shaping Strategy 2023-30

*Making a difference every day*

January 2023



Essex County Council

# About this strategy

This is the Essex care market strategy for adult social care, covering the period 2023-30.

It has been developed over the past 12 months and reflects workshops and input from providers, Adults with Lived Experience, the NHS, Adult Social Care Operations and Commissioning, Procurement, Data & Insight and Finance.

In this strategy we cover:

- 1 Why we need a strategy
- 2 Overview of the Essex care market and how it is already changing
- 3 Future vision for social care in Essex, and what this means for how the market needs to change
- 4 Key strategic challenges and market gaps, and the associated actions to address them

# Why have a market shaping strategy

We want to make a positive difference every day to people living with care and support needs, enabling them to live their lives to the fullest.

Essex County Council (ECC) has a market shaping duty to:

- Understand the local market of care provision.
- Stimulate a diverse range of care and support services to meet needs and ensure that people, and their carers are able to achieve things that matter to them.
- Ensure that the care market as a whole is sustainable and fostering continuous improvement.
- Prepare for any provider failure to ensure that people continue to receive the care and support they need in the event that a care provider ceases to be able to provide services.

In Essex there is a wide range of care providers and voluntary & community organisations that supports and provides care to frail older people, adults with learning disabilities or autism, those with mental health support needs, and those living with physical and sensory impairments.

The care sector performs some of the most vital services in our society and is one of the largest employers in Essex, but it also faces significant challenges.

This strategy sets out ECC's approach to shaping and supporting the care market in meeting the needs of our residents.

# Overview of the Essex care market



# Where ECC spend its money

Essex County Council spends almost £600m each year on adult social care, supporting almost 17,000 people over the age of 18 at any one time. The vast majority of spend is currently on long-term support, rather than short-term support. Spending on residential care and on support to people in their own home is pretty equally matched at present.



We spend in total £496 Million on long term support, and the split by age is:

- £207 Million spend on people over 65 years old (41.7%)
- £289 Million spend on working age adults 18-64 (58.3%)

# Essex care market trends

## **1 in 5 adults are over 65 years**

Essex's population is 1.5 million and is growing by 10,000 every year, making it one of the largest county in UK. 21% of the population is over 65 years, and by 2040 is predicted to increase to 25%. Nearly 3% of the population is over 85, and this will increase by 24% in the next 10 years.

## **80% of Essex provider Good or Outstanding**

Essex has a large and diverse care market of over 700 providers, as well as a range of unregulated services. This number has largely been stable for a number of years. Around 80% of regulated providers are rated Good or Outstanding, this is down from around 83-84% pre-covid.

## **Home First approach**

There is an over-supply of residential care beds in Essex, and this over-supply is likely to grow as national and local trends continue to support more people to live at home. This has consequences for the number of, and business models of, care home operators. There is a need to grow domiciliary care capacity in some parts of the county.

## **Growing demand for complex care**

There is growing demand for complex care, particularly in nursing and dementia care – yet there are already challenges in meeting current levels of demand.

## **Care technology supports more life independence**

Care tech can help reduce the amount of direct care, but care technology is under-utilised across the care sector – unlocking this could help free-up direct care capacity for the benefit of more people.

## **Short term support after hospital reduces overall demand**

Short term recovery services from hospital can help reduce ongoing demand but current service provision is fragmented and we are not able meet the demand. This further erodes scarce domiciliary care capacity in an attempt to fill the gaps, and this calls for urgent attention.

## **1 out of 6 people in Essex have long term health issue or a disability**

The number of people with sensory impairment is 240,000 and this is set to grow by nearly 30% by 2030. The number of people with learning disabilities who need help from social care will likely go up by 8% by 2030. There needs to be a wider range of accommodation options that can provide a better community-based alternative to residential care and reduce dependency on out-of-county placements.

## **Unpaid carers plays a critical role**

In Essex we estimate there are over 150,000 unpaid carers, of which only 8,960 are known to ECC. The value of this unpaid care has been estimated at £2.5bn a year (University of Leeds, 2015).

## **Care workforce reduces by 2%**

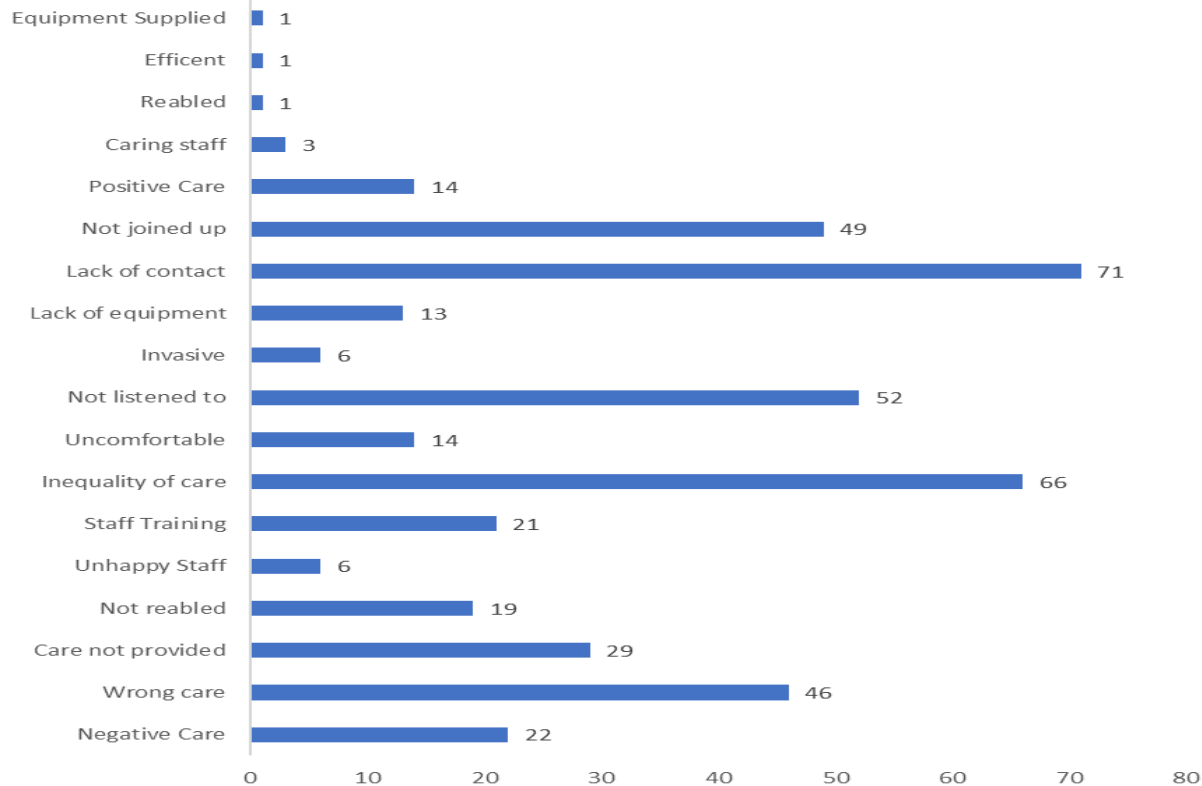
The care workforce has reduced by 2% this equates to almost a loss of 1,000 care workers in the last 12 months, in the face of competition from other sectors. Making the sector an attractive and valued place to work is a key challenge in Essex, as it is across the country.

# What people tell us

Adults and their families tell us that understanding and finding their way around the care market can be difficult. They want to be listened to and given the opportunity to express their desired support, as part of a team effort. People tell us there is a lack of awareness around people with specialist needs and those living with disabilities. Most importantly people did not say they want the traditional care services that we so often focus on but want to be as independent as possible and have opportunities to enjoy a meaningful and full life.

**68%** of the responders agreed that they have resources to sustain or improve on their current level of independence, and 18% disagreed.

## What were the less positive things that could be improved about the service you received from social care?



*“People just don't understand that some people don't know what is available. They think you are just going to know. I am someone who has never been to social care, so I did not know what was available.”*

*“More information, perhaps a key worker to co-ordinate things. There are too many people involved and so many people are telling you different things.”*

*“It was basically like this is what you have got, take it or leave it.”*

*“I am scared to ask for any changes, because the social worker will reduce my care package and I will struggle.”*

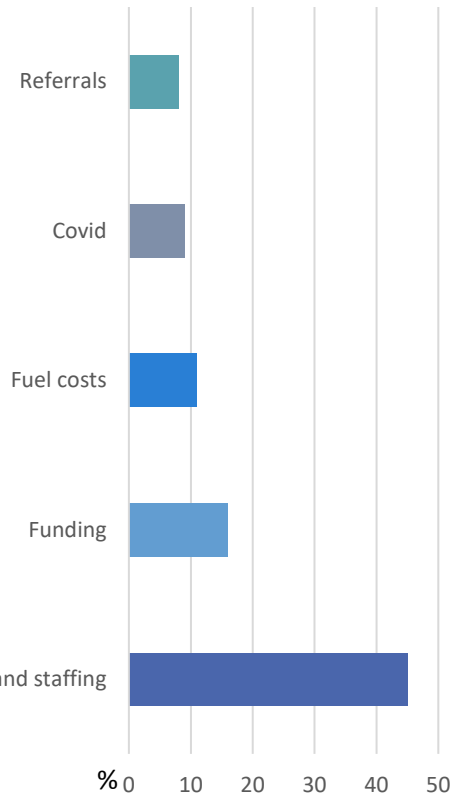
# What providers tell us

The biggest challenge for providers has been recruitment and retention of care workforce. There is a national shortage of care professionals. The economic situation is very difficult. Providers seek increased funding to enable them to recruit and retain workers, and to address challenges around high inflation and energy costs.

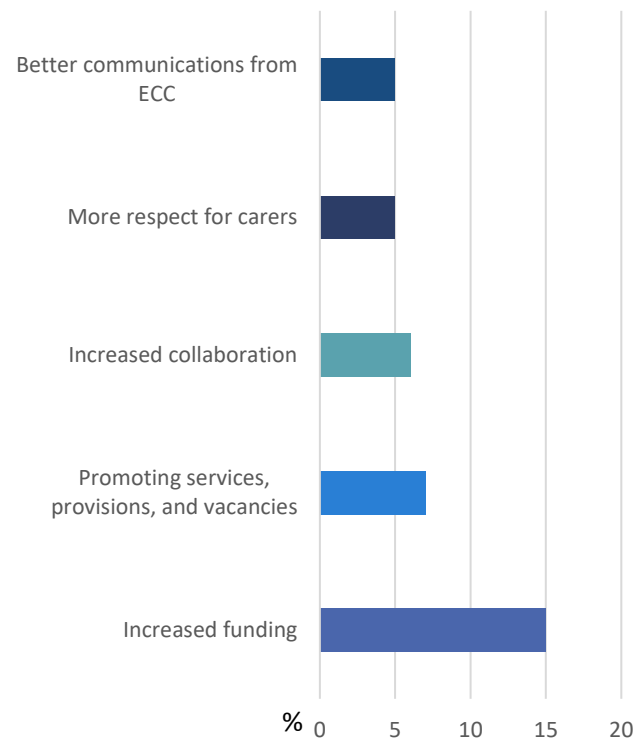
Supported Living providers have felt left out and feel they have not been prioritised as much as other parts of the market.

Relationships and working arrangements with the NHS need to be improved.

Key challenges



Support to improve business



*“We feel we are left out of any key decisions”*

*“NHS partners don’t treat us as equal partners”*

*“I need more clear information, less jargon”*

*“Carers used to overlook the money because they do the job out of love, but love doesn't put food on the table”*



# What does this mean for the care market



## Care Act 2014 responsibilities

The main priorities:

- Promote wellbeing & quality of life
- Promote independence
- Prevent, reduce or delay the onset of care needs
- Safeguard people from harm

The market needs to offer greater choice and personalisation.



## More care & support in the community

We want to see fewer people admitted into long-term residential care. This has implications for a market sector, where there is already over-supply of care home beds. It also has implications for supported accommodation and domiciliary care, where we want to see greater choice and capacity.



## Complex residential and nursing care need

There will always be some people whose care needs are so complex that they require greater levels of support, often in a residential care setting. It is important that we can meet such complex needs in Essex, rather than people have to seek support out-of-county.



## Working as a whole system with integrated care systems

We want to work in close partnership with integrated care systems to transform the way we deliver services. There needs to be a strong alignment between social care and health to advocate prevention and health inequalities, which will drive a sustainable delivery system.

# Care market role

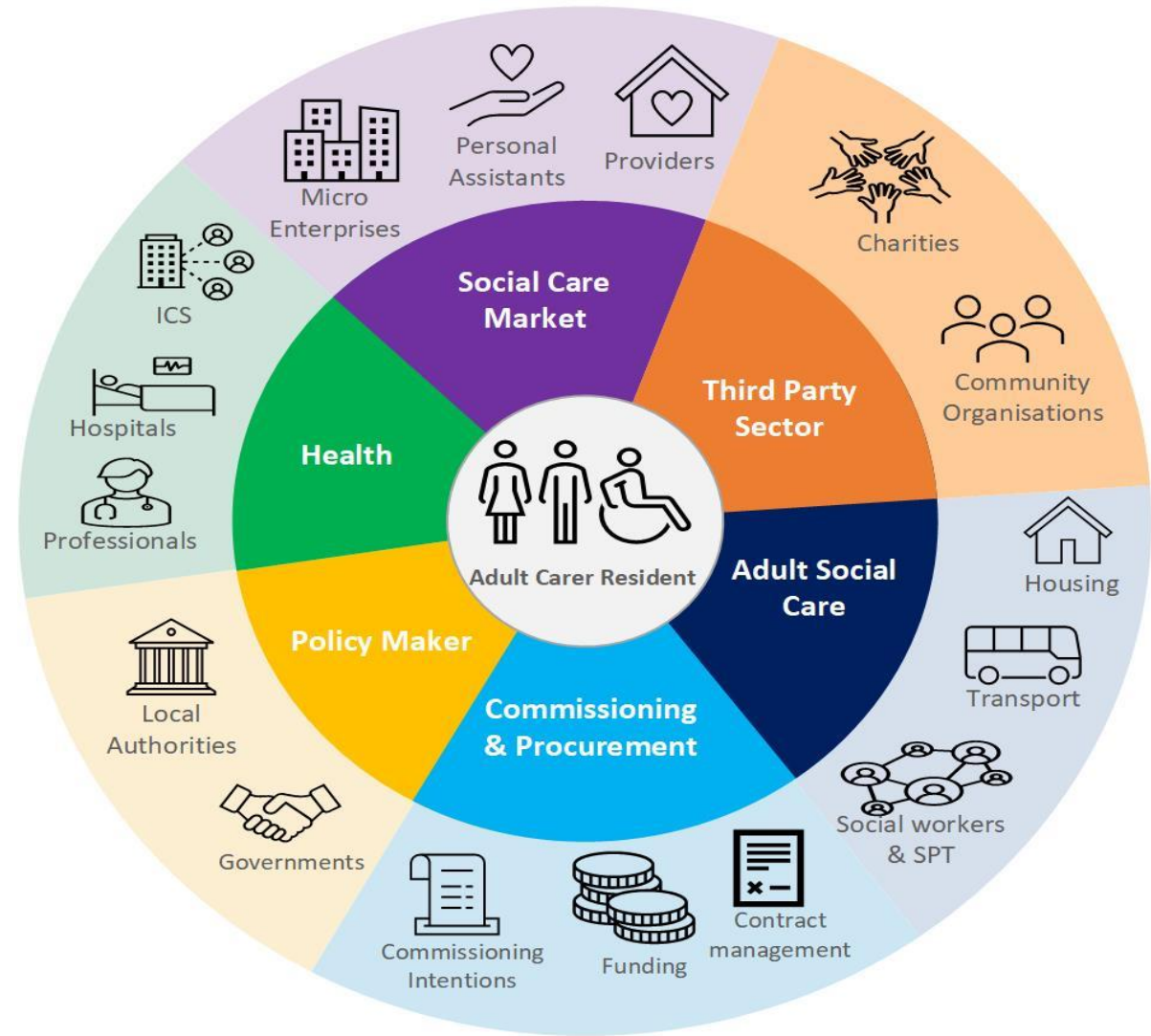
Essex County Council aspires to working in partnership with the market collectively. The Council see the care market as a collaborative partner that works across our network of systems to provide, transform and shape care services and outcomes for people.

Strong relationships between ECC and the care market are vital moving forward. Coproduction, sharing of strategic goals, strategic thinking and an agile approach to learning, and shaping services is vital.

This diagram shows the different influences and drivers on adult social care

Technology, a strong workforce, greater sharing of feedback, shared problem solving and joined up approaches are all key.

A healthy ecosystem requires multiple organisations in our community to benefit each other on their actions, such as adults, digital products and services, providers and partners. Moving forward the Council are keen to be a key player influencing change.



# The 'shape' of the market will change

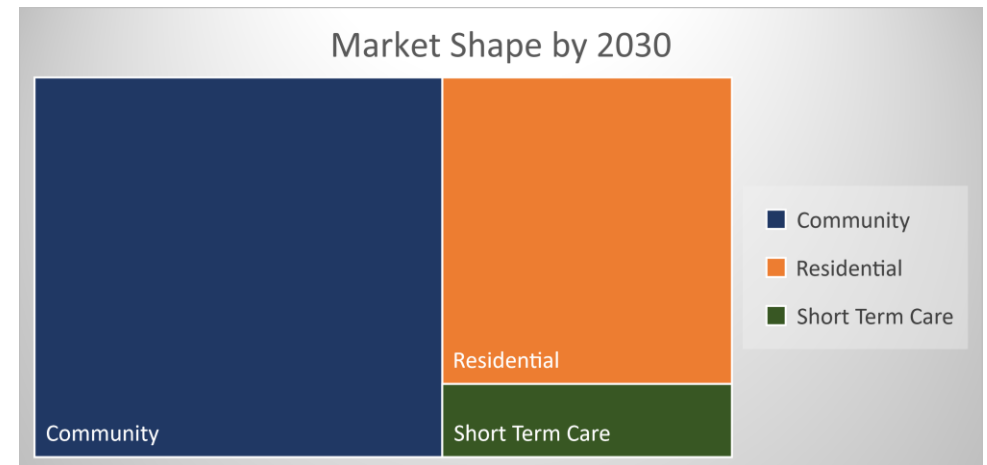
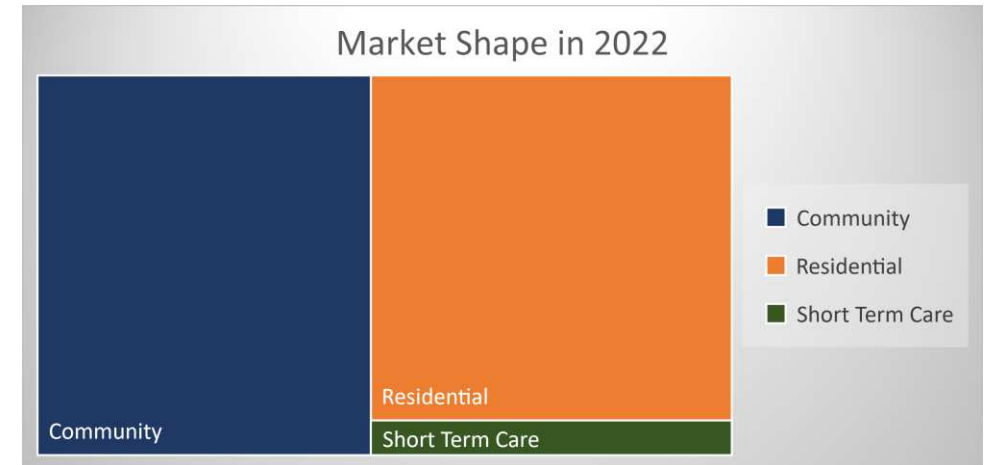
Essex County Council are looking to shape the market to provide more community-based services, and more short-term and early help. This will see residential care become a smaller, but still critical, part of the Essex care market by 2030.

Essex County Council would like to:

- Reduce over-supply of residential beds and ensure adults are able to stay at home with their family and community network for as long as possible.
- Slightly increase nursing provision or placements for Adults with complex needs or behaviours.
- Increase and evolve our community-led services like Domiciliary Care and other services, as well as supporting carers, and utilising technology and equipment that support the adult to remain independent at home.
- Increase Supported Living services to keep adults in the community, providing support and keeping adults safe.
- Increase the use of Personal Assistants, Micro-enterprises, Individual service funds and direct payments to optimise the Adults' opportunity for choice and control.
- Improve our short term and early help service offer to prevent and avoid hospital admissions, and reduce Adults requiring long term provision whilst reducing their needs for longer term services.
- Promote local community networks and provision for Adults and Carers that incorporates our voluntary sector, community provision and local services for Adults requiring services.

## Different markets will change over time

These charts provide an *indication* of the market size, and how we aim to see the relative market sectors change over time as we aim to see more people to be supported to live in their own homes.





# Our Market Vision

Enabling people to live their lives to the fullest through a vibrant and sustainable care market, supporting Essex residents to develop their strengths and personal independence

# Our Mission

*Making a difference every day*

# Our shared market values

Through conversations and engagements with our market and stakeholders, we have agreed on these values whilst working with our market and partners to deliver a diverse care market:

- To ensure lived experiences of people in Essex truly influence and are embedded in all our approaches
- To promote trust, transparency and honesty
- To communicate, engage and collaborate towards shared goals
- To show respect, objectivity and openness when collaborating
- To promote learning, change and excellence of social care provision

## **ECC will:**

- Publish clear commissioning intentions and provide access to a dynamic market position statement
- Commit to engage and work with ECA and other market forums to provide insight, information and intelligence on existing and up and coming procurements
- Share information & opportunities on our care provider hub
- Commit to collaborative events /workshops to ensure the Adult with Lived Experience shape future commissioning intentions alongside our providers/markets
- Support our providers to meet their social care skills training, and support with business skills that can encourage growth and innovation
- Promote the sector as a whole and celebrate success
- Encourage a zero-tolerance mandate around discrimination and abuse with the care providers

## **Provider & Partners will:**

- Invest their time to share insight to collaborate on existing or future markets
- Support good relationships across with health and social care, and other providers in the market
- Think Local, working with other providers in their area to support an effective localised model

# Our market principles

Through conversations and engagements with our market and stakeholders, we have agreed on a set of principles that will be utilised as part of our existing service delivery and support our future commissioning of services across Essex

Principles	I Statement	We Statement
<b>Person Centred &amp; Inclusive</b>	I feel treated with respect and dignity	We have a 'can do' approach which focuses on what matters to people and we think and act creatively to make things happen for them.
<b>Community-based</b>	I feel welcome and safe in my local community and can join in community life and activities that are important to me	We work in partnership with others to make our local area welcoming, supportive and inclusive for everyone
<b>Transparency</b>	I know what my rights are and can get information and advice on all the options for my health, care and housing.	We make sure we share information about what we do and how people can access our service with other relevant organisations so we can all work more effectively.
<b>Wellbeing &amp; Independence</b>	I live in a home which is accessible and designed so that I can be as independent as possible.	We make sure people feel safe and comfortable in their own home, which is accessible, with appropriate aids, adaptations, technology and medical equipment.
<b>Collaboration &amp; Integration</b>	I know how much money is available to meet my care and support needs. I can decide how it's used – whether it's my own money, a health or social care personal budget, or a budget managed on my behalf.	We work with people as equal partners and combine our respective knowledge and experience to support joint decision-making.
<b>Evidenced based &amp; Service Quality</b>	I can get skilled advice and support to understand how my care and support budgets work and enable me to make the best use of the money available.	We don't make assumptions about what people can or cannot do and don't limit or restrict people's options.

# Strategic priorities

What we want to achieve and what we need to focus on to get there?

# Our Shared Objectives

**For the adults and carers that need care and support, we want to:**

- improve and maintain their quality of life, and ensure they have a positive experience of care and support
- ensure they have a personalised approach to their care and support, and have choice and control over the services they receive
- support the use of our community-based offer, offering adults, carers and families to use services in their community
- improve service delivery models for pathways and integration which focuses on prevention and hospital avoidance
- ensure they are supported to be as independent as possible, and to remain in a safe place within their community for as long as possible
- support positive risk taking, whilst ensuring they are kept safe from harm, neglect or abuse
- promote support to carers by ensuring included in all pathways, and offer digital solution towards an overall family wellbeing





# Our Shared Objectives

## For the Essex care market, we want to:

- ensure Essex has a sustainable and vibrant market that is affordable and delivers good quality care for the residents of Essex
- ensure quality and choice in each part of the county
- ensure the care market has access to a skilled and valued workforce and is a sector that people want to choose to work in
- attain equality of market capacity with anticipated demand across the segments of the market
- ensure there is appropriate supply to meet existing and future demand for social care
- incentivise flexible approaches in delivering an outcome focused service that promotes independence, prevention and early intervention.
- ensure we can secure continuity of provision in the event of provider failure or breakdown of services
- improve collaborative working between care providers, and with Health and Housing partners, to identify opportunities to improve the delivery of services
- improve our localised community offer that incorporates our 3<sup>rd</sup> sectors, to optimise local services and networks for adults

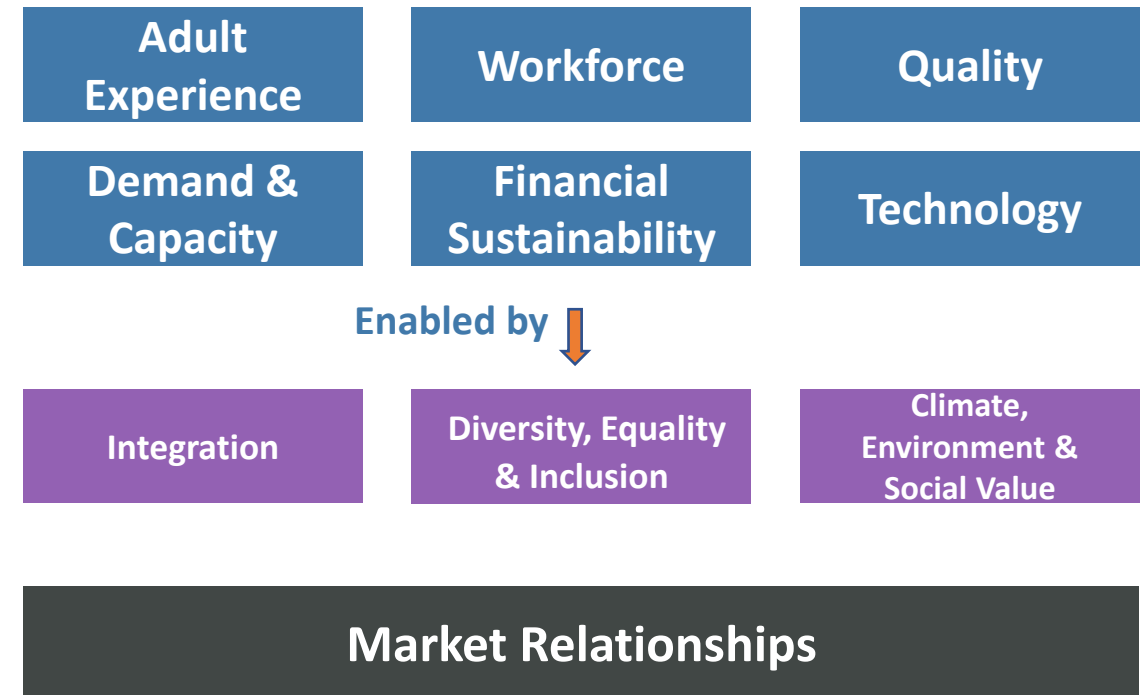


# Focus of this strategy

This strategy is primarily focused on addressing 6 critical themes that emerge from our market context and data and from the workshops and engagement we have held:

1. Addressing care market workforce recruitment and retention challenges
2. Ensuring effective management of capacity and demand, both now and for the future
3. Putting lived experience of the person at the centre of what we do
4. Ensuring delivery of good quality services
5. Digital & Technology that maximises independence and workforce efficiency
6. Promoting the financial sustainability of the sector as a whole

These are the foundational buildings blocks for success identified through our market engagements



# Why these 6 critical themes?

- 1. Addressing care market workforce recruitment and retention challenges**
  - About 12% jobs are vacant and the number of vacancies grew 33% in 21/22 (Skills for Care)
  - Lack of pipeline of new entrants to care sector among younger age groups, and 28% workforce already over 55
  - Lack of career progression opportunities
- 2. Ensuring effective management of capacity and demand, both now and for the future**
  - There are some supply issues in parts of the county, especially for domiciliary care and complex care
  - There is an over-supply of residential care beds, and this is likely to widen
  - Intermediate care services are fragmented and cannot fully meet demand
- 3. Putting lived experience of the person at the centre of what we do**
  - Lack of co-ordinated mechanism for capturing lived experience across the system
  - Personal Assistant market is under-developed and lacks support
  - Information, Advice and Guidance is fragmented and sub-optimal
- 4. Ensuring delivery of good quality services**
  - 80% providers are good or outstanding, but this means 1 in 5 require improvement or are inadequate
- 5. Digital & Technology that maximises independence and workforce efficiency**
  - Care technology is under-utilised in the sector and can support independence and quality of life
  - Opportunities to support workforce efficiency and workload
- 6. Promoting the financial sustainability of the sector as a whole**
  - Financial challenges facing council and care providers and major national care charging reforms due October 2025

# Our priority themes and strategic actions

Theme	Strategic actions
<b>Workforce recruitment &amp; retention</b>	<ol style="list-style-type: none"><li>1. Improve access to pipeline of new workers incl. links with school/colleges and international recruitment</li><li>2. Improve access to training and development opportunities for care workers</li><li>3. Improve access to better pay terms and conditions and access to other benefits (e.g. rewards, discounts)</li><li>4. Improve support offer for our voluntary and unpaid carers and PAs</li><li>5. Develop joint workforce plans with health</li></ol>
<b>Capacity &amp; demand management</b>	<ol style="list-style-type: none"><li>1. Commission new integrated intermediate care services, alongside the NHS, that promote recovery and reduce avoidable ongoing care needs</li><li>2. Develop support and investment to increase Supported Living, Extra Care and domiciliary care capacity</li><li>3. Work with ASC sector and NHS to facilitate and incentivise 7-day approach to discharge</li><li>4. Improve ECC systems to capture market data to enable better matching of supply and demand.</li><li>5. Develop improved Early Help offer, working with NHS, district councils and voluntary and community sector</li></ol>
<b>Putting lived experience at the centre</b>	<ol style="list-style-type: none"><li>1. Improve Information, Advice and Guidance and use a simple language that people understand</li><li>2. Improve process for capturing lived experience on a systematic basis – via ECC and via providers</li><li>3. Embed Co-Production and co-design with adults to inform commissioning of services</li><li>4. Develop and grow the PA market and community micro-enterprises</li><li>5. Improve ability for people to self-serve and to control their care and records</li></ol>
<b>Delivering good quality service</b>	<ol style="list-style-type: none"><li>1. Promote collaboration between providers to support quality and resilience (multi-academy trust model)</li><li>2. Use our commissioning frameworks to incentivise and reward quality and the delivery of outcomes</li><li>3. Local commissioning plans and joint working with voluntary and community sector</li><li>4. Focus ECC traded company on supporting critical statutory duties, innovation or risk of failure</li></ol>
<b>Technology capability</b>	<ol style="list-style-type: none"><li>1. Expand and grow care technology service, especially to support working age adults and Older People</li><li>2. Roll-out digital care records across care sector, with ability for adults to access and own their own record</li><li>3. Enhance ECC digital offer to enable people to self-serve and source their own care</li><li>4. Improve ECC data capture and processes for sourcing care</li></ol>
<b>Promoting financial sustainability</b>	<ol style="list-style-type: none"><li>1. Move towards paying Fair Cost of Care rates over next 2 years subject to available funding</li><li>2. Fee uplifts to be directed at framework and strategic suppliers</li><li>3. Develop ECC support offer to providers to support with their procurement, training and energy costs</li></ol>

# Enabling Themes

Further areas for development



# Enabling themes and strategic actions

## Theme

## Strategic actions

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### **Health & Social Care Integration**

1. Review and re-shape the Better Care Fund to promote shared outcomes and joint working
2. Develop joint place-based plans with each Alliance
3. Enhanced approach to addressing and reducing health inequalities
4. Enhance and develop integrated neighbourhood teams

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### **Diversity, Equality & Inclusion**

1. Increase uptake of disability training in the market such as sensory & autism
2. To promote inclusive employment opportunities through the supply chain
3. Ensure the levelling-up agenda is embedded within place-based plans
4. Adopt a Zero Tolerance policy to abuse across all protected characteristics

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### **Climate, Environment & Social value**

1. Establish baseline position of care market against Carbon Net Zero ambition
  2. Raise awareness, train and educate our social care market on the value of climate, environment & social value
  3. Support and incentivise providers to embrace climate, environment and social value
  4. Ensure all services in Adult Social Care incorporate Climate, Environment and Social Value
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# Enhancing Market Relationships

Working with the market to deliver the change we want to see



# Enhancing Market Relationship

## Theme

## Strategic actions

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### Market Relationship

1. Support the enhancement of Essex Care Association to increase offer to social care market
2. Drive towards Fair Cost of Care using government funding
3. ECC to publish clear commissioning and funding intentions for care market
4. Ensure ECC actively collaborate with providers on operational issues
5. Ensure engagement of care providers in Integrated Care Systems and local place-based alliances

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### Working with the market to deliver the change we want to see:

- Services to be person centred, inclusive and outcomes focused
- More focus on early intervention and prevention to reduce avoidable health inequalities
- Essex Care Association offer to the market is expanded to deliver training and has a proactive role within the market
- Greater collaboration between providers, encouraging providers to share mutual aid, share staff or services
- Social care and health integration have more collaboration towards commissioning models and more joint up around the recruitment
- Providers are valued and listened too, and to increase trust, productivity and a whole system service delivery
- Providers are supported and have built up relations within our localities which aligns to future alliance work
- Increase our market relationships with the smaller providers within our voluntary sector, or markets such as PA's and micro enterprises
- Care market providers are delivering towards their carbon reduction plans, and care workforce is fully carbon literacy trained by 2030



# Measuring success



# How we will measure success

This strategy sets out our ambitions and intentions for the care market. We need to develop a range of quantitative and qualitative measures to assess its success, and these will include:

- ✓ A reduction in permanent admissions to residential care
- ✓ A reduction in the supply of care home beds
- ✓ An increase in the use of short-term Services
- ✓ An increase in the % of people supported to live in their own home/community
- ✓ An increase in care market recruitment and retention rates
- ✓ An increase in the % of care providers rated Good or Outstanding
- ✓ An increase in satisfaction with services for care users and for unpaid carers
- ✓ An increase in the number of people supported via care technology to live as independently as possible
- ✓ An increase in adults with learning disabilities accessing paid employment
- ✓ Continued high levels of satisfaction on quality of care, value for money and choice
- ✓ Readiness for the Social Care Reforms and the reforms land well across Essex

This information is issued by:  
Essex County Council

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can be translated, and/or made available in  
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Further Appendices to be included