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| **Briefing** |
| **Strategic Market Review**  |
| **Subject** |
| **Care Homes (residential and nursing) and Domiciliary Care** |
| **Project overview** |
| Suffolk County Council, NHS Ipswich & East Suffolk Clinical Commissioning Group and West Suffolk Clinical Commissioning Group (the Partners) are reviewing their commissioning strategies for care homes (residential and nursing) and domiciliary care. In order to make informed decisions about forward plans to support a new way of working from April, 2017 and ensuring services are fit for the future there is a need to bring together market intelligence to ensure that the commissioned services are sustainable, of the right quality and affordable.To this end we are looking to jointly commission a time-limited Strategic Market Review to inform our future market development strategy to meet the care and support needs of the people in Suffolk.The review would cover the following geographical areas:* Entirety of the Suffolk County Council Locality;
* NHS Ipswich & East Suffolk Clinical Commissioning Group locality;
* West Suffolk Clinical Commissioning Group locality;
* Waveney district covered by NHS Great Yarmouth and Waveney; and,
* Potentially the Great Yarmouth borough within NHS Great Yarmouth and Waveney.
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| **Deliverables & Approach** |
| 1. A commercial review of the care home market that includes
	1. Proposal for a sustainable price point/model for the provision of care that ensures providers can deliver effective high quality services effectively.
	2. An assessment of the financial impact of the implementation of a shared pricing framework for the NHS and Social Care.
2. Demand model for care, projecting the capacity required over the coming months/years.
3. A directory of care services for Suffolk at boarder providers that includes:
	1. Capacity
	2. Capability & Quality
	3. Price
4. Assessment of market readiness for integration and early intervention/prevention models within residential/nursing and community based settings
5. A road map to take Suffolk from an unstable care market with variable ‘value’, to a sustainable engaged active care provision.
6. A robust methodology and approach to the delivery of this time focused work, including
	1. Delivered by senior resources with both health and social care experience
	2. Experience of the delivery of whole system market reviews including an ability to deliver deep analytics
	3. Commercial / financial forecasting experience / evidence of delivery
	4. Proven stakeholder engagement and management methodology.
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| **INformation to be included** |
| * Increase commissioners understanding of the Suffolk care market (including borders) through understanding the key features of the market? i.e.
	+ provider types (private and voluntary sector)
	+ types of service provision; including reablement and respite / short break
	+ number of providers and market share
	+ purchasers of care (self-funders / Local Authority, and, or, NHS funded)
	+ pricing and market share (private market, SCC and NHS)
	+ quality profile / outcomes and trends
* Understand current and predicted future growth in demand for care and support services.
	+ What are the underpinning demographics, drivers and trends and how do we ensure adequate / sustainable supply for the needs for our population?
* Intelligence about the aspirations, priorities, needs and preferences of those who will need care and support, their families and carers, and the changing care and support needs of people as they progress through their lives.
* What are the key challenges, risks and opportunities facing the community care sector? i.e.
	+ cost pressures
	+ nursing and care staff workforce availability, retention and development
	+ Impact of increased acuity, challenging behaviour (dementia care) and End of Life
	+ Maintaining and driving up quality
* Identify gaps in service provision, with reasons and impact i.e.
	+ Avoidable hospital admissions
	+ Delayed discharges from hospital
	+ Where in the county is additional care capacity required to meet future demand?
* Assess the costs of care; ensuring appropriately resourced care and support to provide quality services
* Assess the impact of Personal Health Budgets, Individual Service Funds and Direct Payments
* Identify and understand the role and impact of services and support provided by voluntary, community services, supported housing providers, and other groups that make up ‘community assets.’ How can we make sure that the services are provided in a more joined-up way with other services?
* Identify ‘best practice’ examples from commissioning approaches elsewhere and from the local market.
* Identify innovation opportunities for service development and efficiencies through co-production and joint commissioning i.e. nursing care provided in residential settings, step up / down / cross service capacity according to need.
* Ensure ‘future proofing’ suggestions align with and support the system (commissioners and providers) in the shaping and development of the future integrated health and care models as described in the emerging ‘Sustainability and Transformation Plan’.
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| **Approach** |
| * This work will need to be undertaken using a variety of methods, including;
	+ Analysis and synthesis of Suffolk care market data / information;
		- Commissioner data / information
		- Care provider data / information
		- Other sources i.e. CCN Report, Valuing Care, NMDS.
	+ Use of mapping tools – geographical distribution of residential and nursing homes
	+ Desktop research to identify local, regional and national issues affecting the care market
	+ Direct engagement with; stakeholders, i.e. service users, their families and carers, care providers, other ‘community assets’ providers and commissioners – through a combination of one to one interviews, workshops and questionnaires.
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