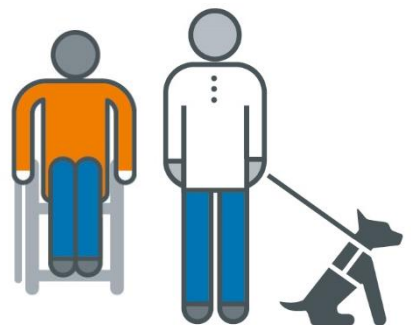


Adult Social Care Market Position Statement- April 2024 to 2027



CITY OF LONDON CORPORATION

**DEPARTMENT OF COMMUNITY AND
CHILDREN'S SERVICES**

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Introduction

The health and social care landscape has transformed over the past decade. With an ageing population and greater emphasis on choice, control and community-based support, the City of London Corporation is working to adapt its services to this changing social care market. This includes a greater focus on home care, specialist mental health provision, and supported living that enables independent living.

The City Corporation welcomes these changes as an opportunity to enhance outcomes for residents. Our vision focuses on prevention, early intervention and strengths-based care that maximises independence. We are embracing integrated, person-centred approaches across health and social care. This will support our residents to lead fulfilling lives within a community that meets their needs.

Although the City of London is seeing an increase in its elderly population as well as a small increase in its total population (Census 2021), this is not currently correlating into a greater demand for our services.

By publishing this Market Position Statement, we seek to promote constructive dialogue on the future of social care provision in the City of London. We invite innovative partnerships to help shape a local care system centred on quality of life and wellbeing. These partners may be from the commercial sector, as well as voluntary sector partners or other local authorities. Together, we can develop services that enable people to age well and maintain connections to the place they call home.

About this document

This Market Position Statement summarises current and future adult social care needs within the City of London. It outlines how the City Corporation and partners will collaborate with providers to commission quality, sustainable services that support our ageing population.

Primarily aimed at care providers, the statement sets out our commissioning priorities to shape the social care market in 2024 and beyond. It provides an evidence-based overview of our existing provision and projected demand. This intelligence intends to assist providers in targeting service innovations that enable local people to age well despite increasing demand for our services.

Our vision is to build a person-centred care system tailored to the City of London's unique circumstances. By understanding our strengths as well as challenges, we invite fresh thinking on community support that upholds dignity and connections in later life. This statement establishes a foundation for constructive dialogue between partners united in enabling people to remain in the places they call home.

Adult Social Care in the City of London

The City of London is home to 8,600 residents, with 14% aged 65 or over. Life expectancy exceeds the London average, yet complex needs persist among vulnerable groups like rough sleepers. Compared with the England average, the City of London has significantly lower levels of income deprivation and older people in

deprivation. However, according to the Indices of Multiple Deprivation 2019, the City of London's most deprived ward (Portsoken) on the east side of the City of London was amongst the top 20% in the country for levels of income deprivation, including income deprivation affecting older people. Additionally, the Mansell Street and Petticoat Lane area is the most deprived in the City of London falling into the 40% most deprived in England. However, this area of the City of London tends to have a younger profile and therefore is not having a detrimental impact on demand for adult social care services.

The City of London is surrounded by seven local authorities, and therefore many of its residents seek and access services hosted within these neighbouring authorities. There is one commissioned homecare provider and a high rate of people who have a direct payment to purchase their own provision. There are no accommodation-based support options based within our boundary, and therefore placements are spot purchased.

There is one GP Practice in the City of London (the Neaman Practice) which has 6366 (80%) of City of London residents registered while around 1577 (20%) of residents (on the east side of the City of London) are registered with Tower Hamlets GPs. Of those residents who attend a Tower Hamlets GP, 90% go to two practices – Goodman's Fields Health Centre (50%) and The Spitalfields Practice (40%) All these practices sit within the North-East London Integrated Care System. In terms of acute hospitals, City of London residents generally go to the Royal London hospital in Tower Hamlets or University College Hospital in Camden (which is in the North Central London Integrated Care System). Community Services for City of London residents are provided by Homerton Hospital.

This juxtaposition of affluence and deprivation, coupled with the unique but complex pattern of service delivery shapes adult social care demand within the City Corporation's compact jurisdiction.

Future needs forecast

A key factor in influencing the demand for adult social care is demography. In an ageing society, it is logical to expect that demand will increase.

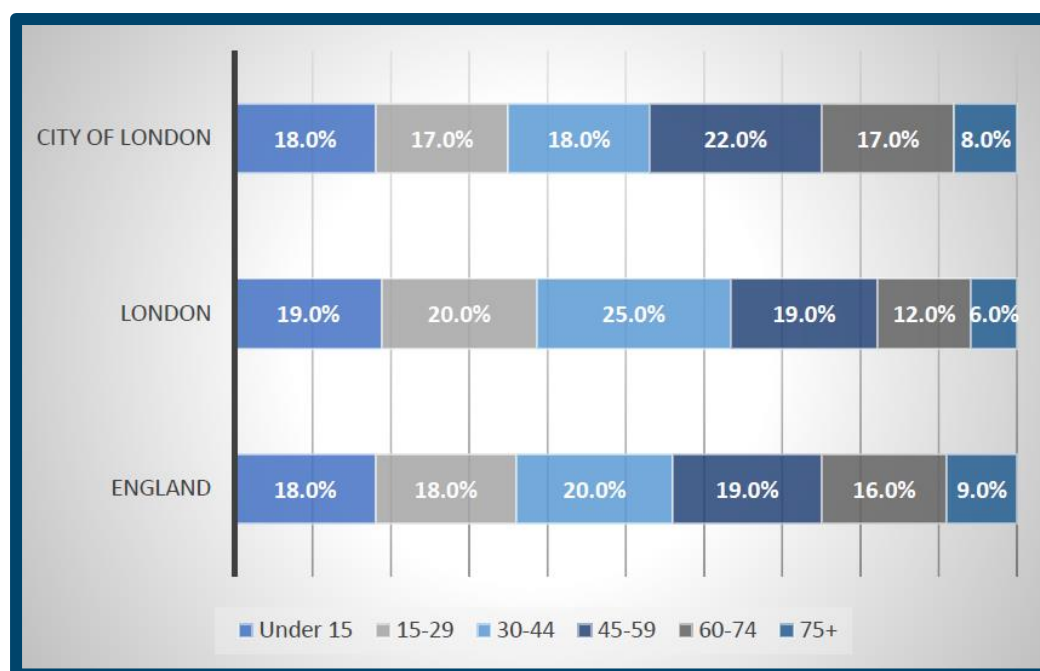
The population of the City of London is recorded as being around 8,600 people in the 2021 Census, up from around 7,400 in 2011. This represents an increase of 16.6% against an England figure of 6.6%. Table one below shows the projected changes in numbers of households from 2023 to 2043.

Table one: Projected changes in City of London household population and size 2023 – 43. Year

| Year | Number of Households | Household population | Average household size |
|-------------|-----------------------------|-----------------------------|-------------------------------|
| 2023 | 4,328 | 8,712 | 2.01 |
| 2033 | 4,586 | 9,094 | 1.98 |
| 2043 | 4,848 | 9,367 | 1.93 |

Figure one shows the current age population estimates within the City of London, London, and England. It shows that the population over the age of 60 makes up 25% of the total population in the City of London. The number of older people living in the City of London is projected to increase, with projected growth of 41% in people over the age of 60 by 2043.¹ This suggests that older people will make up a higher proportion of the total population in the City of London than regionally or nationally.

Figure one: Age population profile 2023 (Source, ONS population estimates)



Self-funding

In October 2023, the Government introduced a new £86,000 cap on the amount anyone in England will need to spend on their personal care over their lifetime. In addition, the upper capital limit of eligibility of people who have savings worth more than £23,250 will rise to £100,000 from October 2025. As a result, people with less than £100,000 of chargeable assets will never contribute more than 20% of these assets per year.

Due to the higher level of affluency in the City of London, as well as high house prices, it is likely that there are a number of self-funders within our boundary.

¹ [City Plan 2040 \(cityoflondon.gov.uk\)](https://cityoflondon.gov.uk/city-plan-2040), accessed 12 January 2024

Current and future challenges for social care provision in the City of London

The table below summarises the key challenges in the Adult Social Care market in the City of London both currently and projected.

| Factor | Challenge |
|-------------------------------------|--|
| Aging population | Increased demand for services as the population over the age of 60 increases. |
| Mental health | Increased demand for mental health services locally and nationally since the Covid-19 pandemic. |
| Increases in life expectancy | As more people live longer, so do the need for social care and greater complex care needed. |
| Deprivation | Deprivation is associated with higher care needs and rates of multiple long-term conditions. |
| Legislative change | The impact of social care reforms is still uncertain but likely to significantly impact how the sector currently operates. |
| Cost of living pressures | Increases in people struggling financially and the ability to fund their own care. |
| Workforce pressures | Recruitment and retention of staff is challenging for care providers in the current financial climate and inflation has added additional pressures to care provider and local authority budgets. |
| Impact of Covid-19 | Many health and social care workers left the sector due to burnout or pursuing a career change. Covid-19 outbreaks continue to occur and pose a risk to older people. Some older people have been left with long term Covid-19 and require additional long-term support. |

Our principles and vision for social care

Our vision is for residents to easily find and access the right information, advice, support, and care to live their best lives, maintain their health and wellbeing and live safely in the place of their choice. Our skilled workforce will work with people through the options, and actively champion equality, diversity, and inclusion so all people can get the support they need, when they need it.

The following sets out the key principles of our practice model:

1. **Empowerment, engagement, and co-production** – the City Corporation uses a Strengths Based Approach model which places the individual at the centre, working with individuals and their families and support networks, to identify their outcomes and using all these to underpin all the actions taken together from there.
2. **Safety, protection, and risk management** – this is embedded into all our system work. This is in place right from the start, in our preventative work, with our commissioned providers and with our colleagues at the City Corporation.
3. **Prevention and delay of needs** – prevention is a key tenet of all our work in Adult Social Care and is delivered in a wide range of ways including an innovative Early Prevention Project, a commissioned Early Intervention and Prevention Service and through a range of information and advice.
4. **Working in partnership** – partnership working is a key principle of our Strengths Based Approach. There is good partnership working with local health partners, commissioned providers, and other stakeholders.

Market Sustainability and the Fair Cost of Care

In 2022, as part of the reform, local authorities were required to complete a "fair cost of care" exercise to arrive at a shared understanding with providers of the local cost of providing care. This is to ensure that people find Adult Social Care fair and accessible, and that a fair cost is paid in order to ensure the market of provision is stable and thriving.

For the purposes of the exercise, the Department of Health, and Social Care (DHSC) considered 'fair' to mean the median actual operating costs (the amount in the middle of the lowest cost and the highest cost) for providing care in the local area (following completion of the exercise). 'Fair' also means what is sustainable for the local market. This is, on average, what local authorities are required to move towards paying providers.

The City Corporation identified the lower quartile, median and upper quartile costs in the local area for the following care categories:

- 65+ care homes - (standard residential care, residential care for enhanced needs, standard nursing care, nursing care for enhanced needs)
- 18+ domiciliary care (home care).

The Government recognised the complexity of local care markets, and the risk of oversimplification, but that it is necessary to find a way of standardising cost reporting; the median is designed to reflect that there are a range of local costs.

The report of the City Corporation's Fair Cost of Care Exercise followed the guidance of the Department of Health and Social Care and reflected the key principles of consistency, transparency, and a partnership approach. It also reflected the specific circumstances of the City Corporation. In the guidance from the Government, this report is known as "Annex B". [City of London Annex B](#)

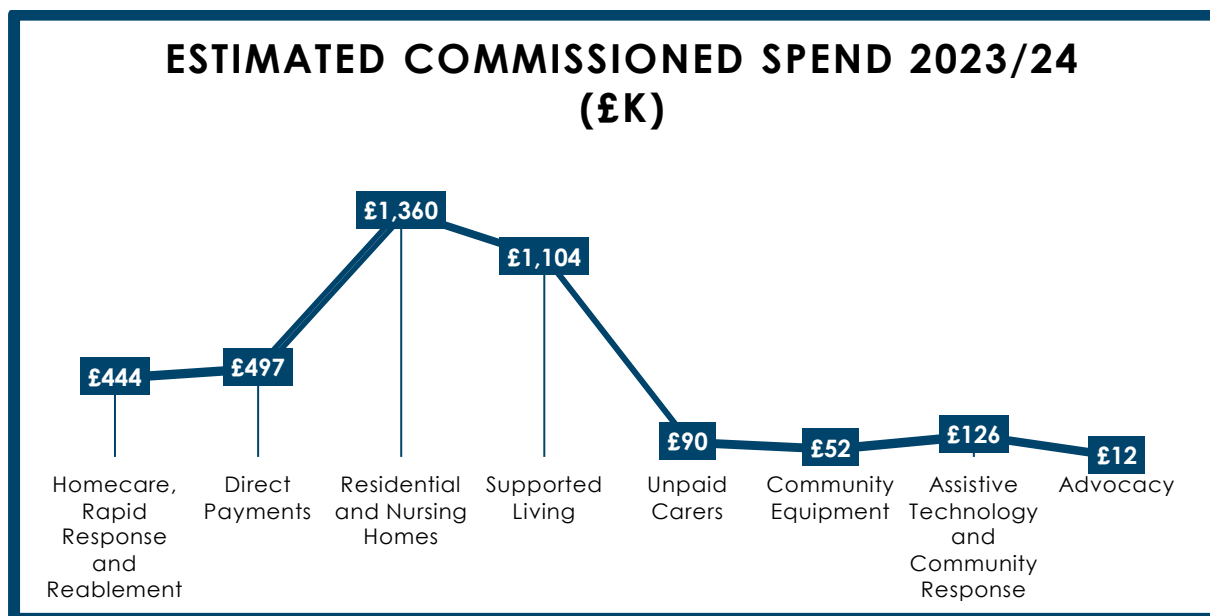
The City Corporation secures care for a range of needs. The scale and diversity of need means that we do not block purchase residential provision, and neither is it viable for the market or the City Corporation provide residential or nursing care provision within our boundaries. Resident choice often results in placements closer to family or friends outside of London.

The City Corporation is committed to secure both quality and value in the residential and nursing care it secures. However, unlike larger local authorities, it does not shape the market of provision, or price, by purchasing at scale. Instead, the City Corporation has the opportunity for flexibility, agility and partnership that enables us to secure stable and sustainable care placements. The City Corporation's Market Sustainability Plan, published in March 2023, sets out how we plan to move towards a fair cost of care, where this is not already achieved, over the next few years. [City of London Market Sustainability Plan](#)

Our current and future commissioning intentions

It is estimated that the commissioned spend for Adult Social Care provision within 2023/24 will amount to just over £3,600,000, which primarily consists of the following services:

- Home Care, Rapid Response and Reablement
- Direct Payments
- Residential and Nursing
- Supported Living
- Community Equipment
- Assistive Technology and Community Response
- Unpaid Carers Services
- Advocacy



Home Care, Rapid Response and Reablement

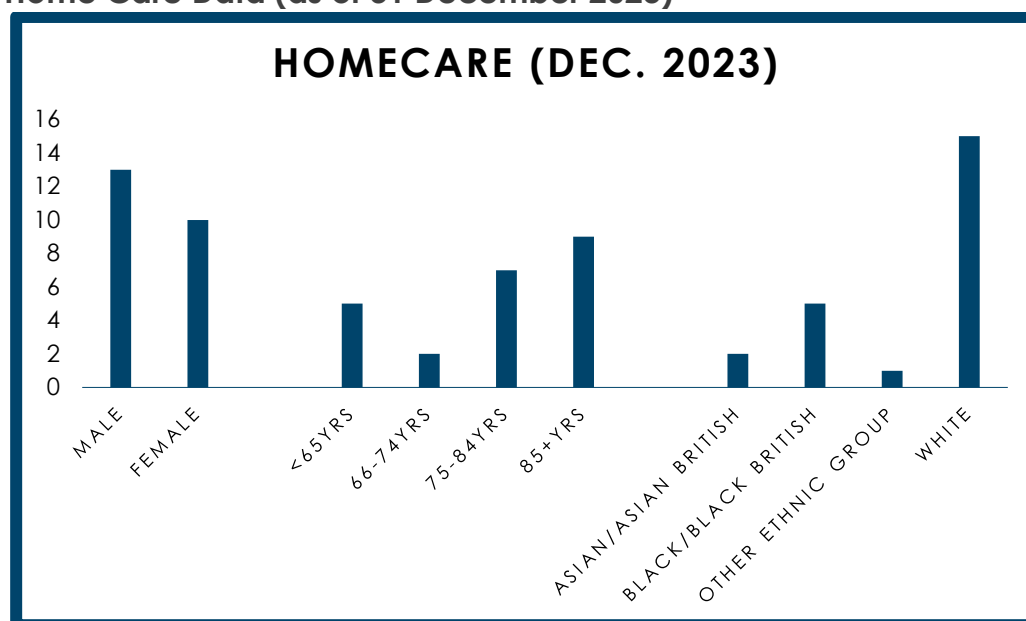
Quality Home care is a vital aspect of the City Corporation's aim to enable people to remain in their homes for as long as possible. These services assist people with the tasks of daily living, usually in their own homes.

The City Corporation currently commissions one care home agency to provide home care to residents within their homes in the City of London and has been doing so since June 2022 following a successful market exercise.

As of 31 December 2023, 23 residents of the City of London were receiving home care directly, totalling 4870 planned visits and delivering 2768 hours of care over that quarterly period.

Demand for home care is anticipated to increase, with packages of care expected to increase above the current average of 480 hours a year, per individual.

Home Care Data (as of 31 December 2023)



The City of London Corporation also commissions a Rapid Response Service. This service provides 72 hours of care on a short-term basis which could prevent an individual going into hospital, or allowing for hospital discharge whilst an individual assessment is taking place.

To further support residents who have returned to their home having been discharged from hospital, the Commissioned Reablement Service provides up to six weeks of care and support to help them regain their skills and confidence following a period of illness. As of 31 December 2023, this service supported 23 service users, with a near 50/50 split based on their identified gender. 15 of these service users were White with the remaining 8 opting for 'Not stated'.

Reablement care was delivered to 24 service users, of which, 19 were Female and five Male.

Market Opportunities and Aspirations

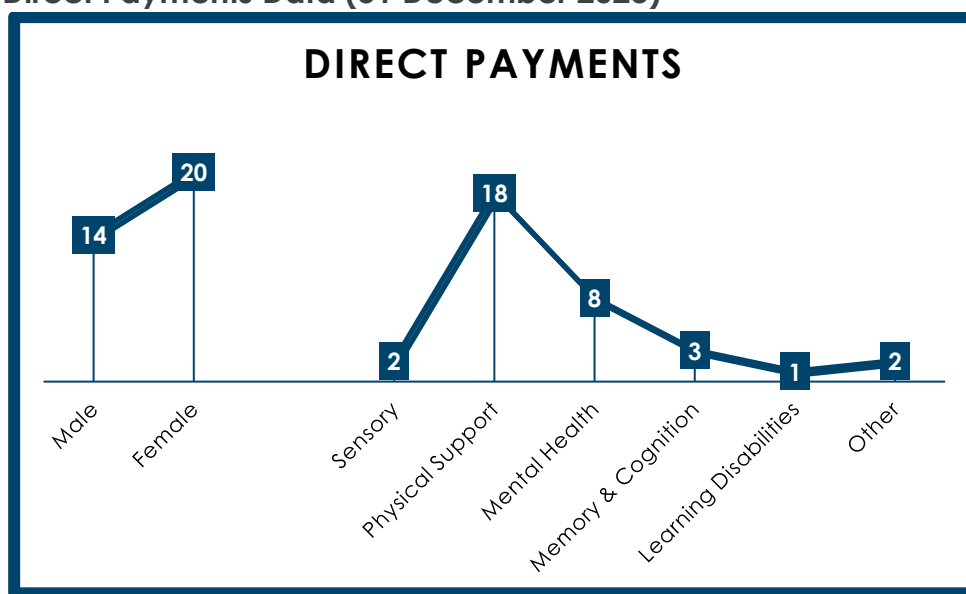
- The current Home care contract is commissioned until 2027. Commissioning does not envisage any short/mid-term procurement exercise for this service. However, this service will be re-tendered within 2026/27.
- Develop Home care opportunities integrating commissioned, direct payments and self-funder service provisions to ensure a consistent and collaborative approach in the delivery and quality of care for the City of London's residents.
- The City Corporation is currently reviewing its model for Rapid Response services over the course of 2023/24. The possible re-procurement of this service will not commence until Quarter 2024/25.
- Promotion of care worker career and development opportunities.
- Improve and develop pathways for providers to access online training and wider initiatives across partner agencies.
- Work with the City Corporation to support the UNISON Ethical Care Charter

- Commit to paying the London Living Wage.

Direct Payments

As of 31 December 2023, 34 residents were receiving a direct payment to purchase their own provision. Some residents decided to choose a direct payment when their home care provider changed, and they wished to remain with the previous provider.

Direct Payments Data (31 December 2023)



Market Opportunities and Aspirations

The review and redesign of Financial Support services, encompassing direct payments, pre-payment cards and appointeeships will commence in early 2024/25. This provision will cover both Adults and Children's social care. It is envisaged that the City Corporation will go to the market in Quarter 4, 2024/25 (date to be confirmed).

Residential and Nursing Care

The City of London has no residential or nursing care homes within its boundary. Therefore, residents requiring residential, or nursing care are placed in care homes situated within other London local authorities or in other areas such as Northumberland, Stockport, and Kent. This spread is driven by client needs and choices rather than market conditions.

There has been a consistent level of demand for residential and/or nursing home care over the past five years. It is expected that at any one time there would be 20 to 25 placements in place, with an annual placement rate of around six to eight. The growth and ageing of the resident population has not led to a corresponding increase in demand for residential care provision.

As part of our Adult Social Care Transformation Programme, a project around brokerage is currently underway. This is designed to make our processes around commissioning residential, nursing and supported living placements more robust, to

increase the strength of quality assurance and to ensure that all information on placements is triangulated through our social care case management system.

As of 31 December 2023, 21 residents of the City of London (ten Male and 11 Female) were living in residential care and eight residents (six Male and two Female) were placed in nursing care homes.

Market Opportunities and Aspirations

- Potential to collaborate with North-East London ICB partner authorities around supply and pricing.
- The Corporation is open to explore and discuss possible options to secure supply and pricing with care homes within the surrounding boroughs.
- Promotion of care worker career and development opportunities.
- Improve and develop pathways for providers to access online training and wider initiatives across partner agencies and host local authorities.

Learning Disabilities

There are currently 12 adults with Learning Disabilities open to the adult social care team, between the ages of 29 and 60. Of these, nine are living in either residential or supported living settings outside of the City of London boundaries. There are three adults with Learning Disabilities who are supported within their homes within the City of London.

There is a joint Learning Disabilities Service in the London Borough of Hackney which brings together the Local Authority and health services for Learning Disabled people together. City of London residents with Learning Disabilities can access these services through this model.

Marketing Opportunities and Aspirations

- In partnership with the London Borough of Hackney, promote greater partnership working to develop accommodation options including the range of High, Medium, and Low support needs accommodation options.
- Signing up to the City and Hackney Learning Disabilities Charter.

Safeguarding and Mental Health

The Adult Social Care service has a personalised approach at the forefront of its safeguarding work, alongside the assessment and mitigation of risk. These principles are applied equally to the proportionate responses taken to those concerns not meeting s.42 (Care Act 2014) enquiry criteria.

As with other London local authorities, the service applies the London Safeguarding procedures. It is also familiar with Transitional Safeguarding and Joint Working with Children and applies these to support a smooth transition to adulthood.

Within the team at the City Corporation, social workers are qualified to undertake Mental Capacity Assessments and the AMPH (approved mental health professional), who is provided by the East London Foundation Trust, carries out any Mental Health Act Assessments as necessary. Best Interests Assessments are spot purchased from an independent provider to ensure independence although several of our social

workers have training in this to ensure an understanding within the service and a link to the commissioned provision.

Mental Capacity Act (MCA) Assessments and safeguarding are included in our schedule for annual audits.

Market Opportunities and Aspirations

- The City Corporation, in partnership with LB Hackney and our NHS provider ELFT is considering scoping the development of a Framework for Mental Health Supported Living provision. Further details will be available via the City Corporation's procurement portal.

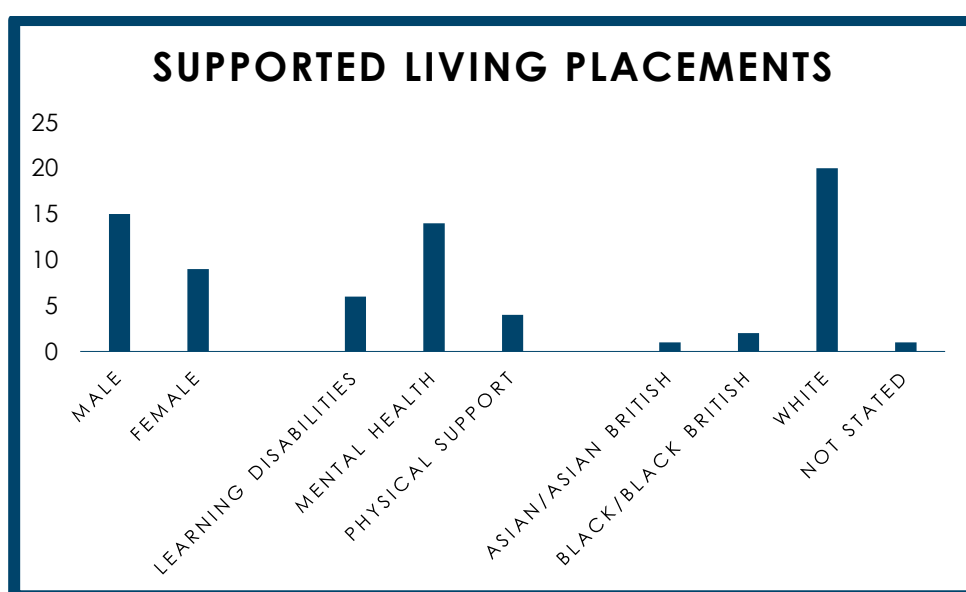
Supported Living

Supported housing gives an individual their own tenancy, ownership, or other legal rights within a block of accommodation which has on site care provision. This might include staff to provide onsite services or personal care 24 hours a day. Supported housing enables residents to maintain as much independence as possible, while providing easy access to the care provision they need to maintain their health and wellbeing.

Many of the individuals who come into this level of care are those who have complicated factors resulting from street homelessness, rather than needing the support because of their age.

The City of London has no accommodation-based support within its boundary and therefore individuals are placed based on client need and choice within the area of other local authorities mainly within the Greater London region.

As of 31 December 2023, 24 residents of the City of London were living in supported housing.



Market Opportunities and Aspirations

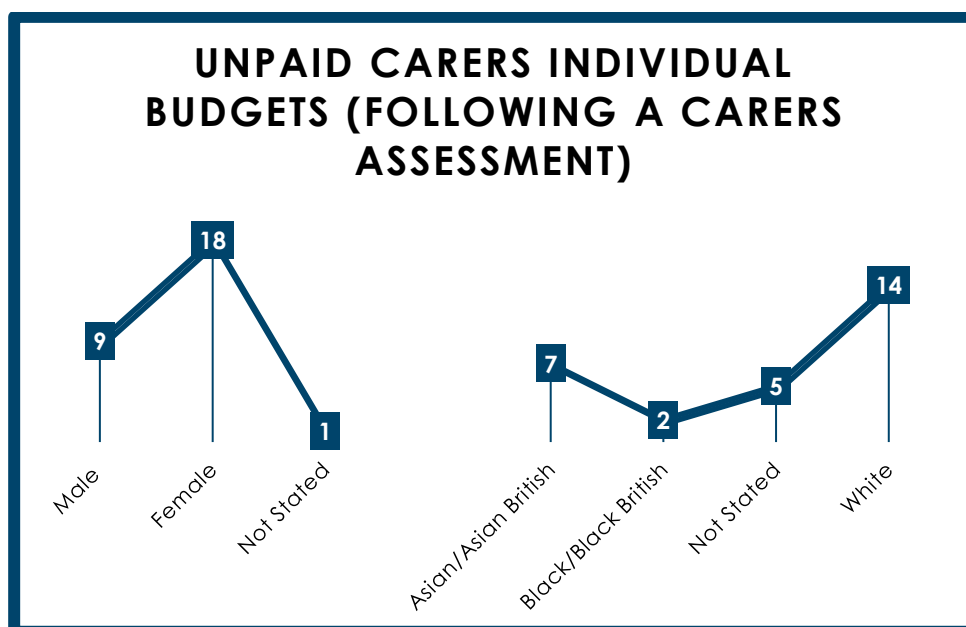
- The City Corporation would welcome the opportunity to discuss low, moderate, and higher needs mental health supported living provision with SLS Providers.

Support for Unpaid Carers

The Adult Social Care Team were supporting 28 carers at the end of December 2023. All carers' assessments are conducted by social workers ensuring that carers assessments are carried out with a high degree of expertise and support plans are developed together. Carers receive individual budgets at one of three levels, and these are not means tested.

Initially, support for carers wellbeing was provided through a commissioned early intervention and prevention service (City Connections) and was general wellbeing support. Following engagement with carers, it became evident that there was a need for a higher level of specific support for carers. This was piloted and will now be continued as a standalone service.

The Carer Connections service has been running since October 2022 with a dedicated Project Manager, through the Tower Hamlets Carers Centre. Initial work reflected the national picture that there are a significant number of hidden unpaid carers in the City of London who may not recognise themselves as a carer and who are not in contact with a carers support organisation. A creative approach to community outreach identified 45 new carers, 51% who identified as being from an ethnic minority background and 49% who live on the east side of the City of London. This has been a significant area of focus for us.



Market Opportunities and Aspirations

- The City Corporation will require a new contract to commence at the end of September 2024 and as such will go out to tender in Quarter 1, 2024/25.

Support for rough sleepers

There has been an innovative approach to supporting rough sleepers with a permanent social worker post within the homelessness service but with professional supervision from the Head of Adult Social Care. This brings knowledge and expertise to working with a cohort who experience some of the highest health inequalities and poorest outcomes. Our work with rough sleepers involves strong engagement with outreach and mental health services to support and inform effective assessments.

As part of our approach to meeting the needs of rough sleepers, a complex needs hostel for City of London rough sleepers was established in partnership with a homelessness charity and a neighbouring local authority. This year, a specific rough sleepers assessment centre to bring together all our assessment services into one physical place will be opened. The Rough Sleeping Social Worker will have strong links into this assessment centre.

Market Opportunities and Aspirations

- The newly commissioned contract Rough Sleeper Assessment Centre has seven years to run.
- The City Corporation plans to undertake a procurement exercise for the provision of a Temporary Accommodation Framework in early 2024/25.

Community Equipment

Community equipment aids and adaptations supports and enables residents to maintain levels of independence within their homes in a safer manner. The range of equipment includes walking sticks and commodes to more complex items including beds and hoists.

The current service is procured via a Pan-London Consortium arrangement, led by the Royal Borough of Kensington and Chelsea. The current contract is due to expire in March 2030.

Housing Adaptations

To allow individuals to remain in their own home for as long as possible, adaptations may be made to a person's living environment to ensure that their home is safe, accessible, and suitable for their needs, especially as they age or if they have disabilities. These adaptations can range from minor changes to major renovations.

Minor adaptations are typically low-cost interventions that can make a significant difference in daily living. These often include:

- Grab rails
- Ramps or steps
- Lever taps for easier use
- Lights that activate automatically

For more extensive changes, such as stairlifts, widening doorways or lowering kitchen worktops, individuals may need to apply for a Disabled Facilities Grant. This grant can help cover the costs of adaptations that exceed £1000, up to a maximum of

£30,000, depending on the individuals' financial circumstances. Adaptions that cost less than £1000 are funded by the City Corporation.

To qualify for a home adaptation, an individual must undergo an assessment of their care needs to determine eligibility. This assessment is usually carried out by an Occupational Therapist from the City Corporation, who will recommend equipment and adaptations based on specific needs.

Market Opportunities and Aspirations

- The Corporation plans to go to the market for a Home Improvement, Advice and Adaptations service (date to be confirmed).

Assistive Technology and Community Response

Telecare assistive technology plays a vital role in the Strengths Based Approach practice model. The City Corporation has a commissioned Telecare Responder Service responding to calls both from the community within the City of London and across several sheltered schemes located outside of the City Corporation's boundary. The supply, installation, and maintenance of telecare equipment within the community is commissioned with a separate provider. The City Corporation currently facilitates Telecare services to just over 70 residents within the City.

Telecare systems can include:

- Personal alarms
- Fall detectors
- Movement sensors
- Environmental sensors monitoring for smoke, gas, or extreme temperatures

These devices can be manually activated or automatically trigger an alert when they detect something amiss, such as a fall.

The refresh of equipment is currently underway as resident's lines of communication changes from analogue to broadband as part of the digital switchover.

Market Opportunities and Aspirations

- A review and possible redesign of the Assistive Technology and Community Response services is scheduled to commence in Quarter 1 of 2024/25. The City Corporation anticipates going to the market over the course of 2025/26 and will be engaging with the Market. Dates will be confirmed.
- The refresh of hard-wired technology from analogue to digital will commence within 2024 at the City Corporation's Sheltered Accommodation schemes, two of which are located in the North and one in the South of the Capital. The City Corporation will go out to the market for the installation and upgrading of equipment.

Advocacy

The City Corporation's independent advocacy service helps people express their needs and wishes, secure their rights, represent their interests, and obtain the care and support they need. There are different types of advocacy services focused on

different groups, such as older people, those with learning disabilities, mental health needs or physical disabilities. Services can be issue-based, short-term or ongoing as needed. The current service ends in August 2024.

Market Opportunities and Aspirations

- The City Corporation will go out to the market for Advocacy services in early Quarter 1, 2024/25.

Voluntary and Third Sector

The City Corporation currently works closely with Voluntary and Third sector, especially through the commissioned City Connections service and welcomes further development of community cohesion opportunities within the City of London.

Further contracting and procurement opportunities

The City Corporation would welcome contact from providers. Please forward any commissioning opportunities or queries to:

Commissioning@cityoflondon.gov.uk

For Residential, Nursing or Supported Living Scheme providers, please forward any placement opportunity or queries to:

DCCSBrokerage@cityoflondon.gov.uk

The City Corporation uses a procurement portal called [Capital E-sourcing](#) for all new tender opportunities. Please register on the portal if you are interested in supplying to the City Corporation.

Further procurement information can be found within the procurement pages on the City Corporation's website:

[Forthcoming Tender opportunities - City of London](#)

The City Corporation also jointly hosts Meet The Buyer Events alongside the Greater London Authority, London Borough of Islington, and Westminster City Council. Further information can be found here:

[MSDUK - Public Sector Meet The Buyer - MSDUK](#)

Further information on the City Corporation's Adult Social Care team and service is available on our website.

[Social Care for Adults - City of London](#)