Adult Social Care Annual Market Position Statement

Data is based on the 2024/25 financial year (or as of 31st March 2025)

Service Area	Description of Market	Further information for Providers:	Relevant financial information and sustainability	What is being measured?	Data source – where relevant	Where are we now? Baseline metric as of 31st March 2025	Where are we trying to get to? (by the end of 25/26)	Progress against target for year one (25/26)
BROAD THEMES across all service areas aligning to People at the heart of Care	- **Service satisfaction from people accessing care and support**	Knowing what people think about services being delivered is an important measure of quality		**Service satisfaction:** 3A. Overall satisfaction of people who use services with their care and support	Adult Social Care Survey data (ASCOF) - results published in October for the preceding year.	Oct 2024 data relating to 2023/24 **69.5%** (compared to Eastern regional average of 65.2% Increase from 67.4% in 22/23)	**72%**	
	- **Workforce – vacancy rates and increased skills**	There are long standing issues with staff recruitment and retention. Knowing staff vacancy rates helps us to understand whether we are making progress and have the capacity to meet the demand. We want staff in the care market to have the necessary skills to deliver high quality care.		**Staff vacancy rates**	Skills for Care – Key findings (published annually in October for the preceding year)	**1800** vacant posts for 2023/24 (2,200 for 22/23)	**1500**	
				Skill level of market: Skills for care data % of the adult social care workforce who hold a qualification relevant to social care	Skills for Care – Qualifications and Training	**42%** for 23/24 (no historic data available)	**50%**	
	- **Quality of service delivery**	Although not all services we commission are CQC registered this is the nationally recognised quality measure.		**Quality of service delivery:**	3rd March 2025: Suffolk had **416** CQC registered locations (**193** residential care services and **223** community-based services), and **154** non-regulated services contracted by ASC	**70.5%** are rated outstanding or good. (National average of 65.5% and eastern region average of 61.5%)	**72%**	
	- **Increased personalisation and greater choice**	We believe that more people taking control over their lives and directly		**Increased personalisation:**	Business Intelligence data	**10,820** long term customers of whom **4,791**	**24%** of customers using a Direct Payment	

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		influencing their care and support delivers better outcomes and higher rates of satisfaction and this is an area that we want to see increase.		Proportion of customers using a Direct Payment to pay for an eligible service		customers have a service for which a Direct Payment could potentially be used. Of these, **1,382** customers have a Direct payment in place **(22%)**	to pay for an eligible service	
Residential and Nursing Care Homes (RANCH)	Total number of Residential and Nursing care providers is 183 of which 178 accept placements from ASC. Total number of beds is 6,210, of which 2,996 are Residential Care beds and 3,214 Nursing care beds. There are 31 residential care homes for people with LD& A and 288 beds. ASC commissions 185 beds (64.2%). There are no specific nursing beds for people with LD&A. The care homes estate in Suffolk consists of modern (post-2000) purpose-built care homes which have nearly 2,900 (40%) beds and a range of adapted older buildings or older purpose-built care homes, that include some that were formerly council-owned, (60%).	More beds are required for people with higher additional needs, including Health complexities, Multiple conditions, Mental Health and Dementia. More appropriate residential care is needed for younger working age adults to support them to live more independent lives with support to access fulfilling and more appropriate activities in their community. Waveney specific: market development needed for more residential & nursing placements to meet predicted increase in aging population.	Total forecast annual spend (2024/25) for Older People is £144m. LD&A forecast spend is £14.6m.	**Demand and supply issues:** Ability to get more care home beds to meet differing types of needs including complex, nursing	Accommodation Strategy	There are currently just under **200** beds suitable for those with complex or mental health conditions. Most provision is in the Ipswich & East area.	To be confirmed when Accommodation Strategy is published in summer 2025	
				Ability to purchase number of care home beds at published rate.	Business Intelligence data	ASC has made **54%** of placements at the published rate in 2024/25, an increase from 49% in 2023/24.	**58%** placements made at published rates	
Home Care	Care is commissioned through the Locality Home Care Framework which was awarded in September 2019 with an option to extend until September 2029. The Framework can be opened annually	Whilst the waiting list remains very low it is still challenging to source care in particular rural areas such as Eye in East	Total spend was £99.7m in 2024/25	Length of home care waiting list	Business Intelligence data	Average of **25 or less people**	Maintain current level of **25 or less people**	

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	but there are no plans to do this as we have almost 120 providers. Providers on the Framework are very localised with almost 60% having less than 50 customers. Providers on the Framework report that about 34% of their customers are self-funding. ASC is continuing with its commitment to embrace digital technology and in home care we introduced E-brokerage in November 2024 making it more efficient and faster to commission care. We are now exploring the introduction of Care Finder to support self-funders and people taking an Individual Budget to source their own care and support.	Suffolk, Mildenhall in West Suffolk and Kirkley in Waveney. The Locality Framework has been in place for nearly 6 years and work will soon start to consider the requirements for a new Framework that will seek to progress ASC ambitions such as; • Replace the traditional time and task model with outcome-based care plans. • Ability to start care for people on the waiting list within 24hrs • More use of digital technology both to deliver care and in business models e.g. use of Electronic Call Monitoring data • Greater us of Direct Payments to enable more people to take control of their own care and support requirements. With an ageing population and increasing demand for home care we have used our in-house service, Home First, to deliver a county-wide reablement offer. This helps to reduce the care package by focusing on independence. The service still does not have sufficient capacity to meet all the need and we tendered for a new External Reablement Lot which started in April 2025.	We continue to commission increasing levels of homecare (April 24 saw 4,200hrs commissioned compared to 5,500 in September 2024) as we support increasing numbers of people with higher additional needs within the community. Currently we spend £14.5million on Reablement Services which includes Home First and External Reablement.	Average number of hours per customer	Business Intelligence data	**14 hours** per home care hours per week	A reduction in average hours reflecting the success of reablement	
				Home First & External Reablement is measured in a variety of ways but the key measurement is customer experience via their reablement outcome.	Business Intelligence data	**50%** of customers fully re-abled, **25%** partly re-abled, **23%** no change and **2%** an increase in needs once their reablement period is fully completed.	Maintain current target	

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Supported Housing	Supported housing is defined as a service where housing, support, and/or care services are provided to help people live as independently as possible in the community. The housing element is provided by a landlord through a tenancy agreement and gives people a right to occupy their home and a greater say in what happens in their home. Most landlords are Registered Social Landlords, such as a Housing Association. However, some accommodation is available from a private landlord. The accommodation is linked to a support offer that we prefer to be provided by a different organisation. It is legally required to be separate where someone receives personal care (e.g. support with washing, dressing, moving and handling) Supported housing can be living in a flat by yourself, living in a shared house or living in a network or block of flats where everyone gets support. Across Suffolk, there are • Around 295 Supported Housing services • There are 55 care and/or support providers. • 64% are within shared properties with the remainder a blend of self-contained or partially self-contained. • Around 1250 people are living in supported housing. • 95% of supported housing is commissioned and contracted by ASC.	We need more variety as we have too many shared houses with communal areas and want to work with landlords and developers to ensure that we have the right properties to meet current and future needs. We want to promote positive risk taking, enabling people to live as independently as possible. This may include: • Greater use of digital technology. • Flexibility in the use of Direct Payments. Increase the opportunities for people to progress into greater independence. We have an ageing population living in Supported Housing and we want to shape services to allow greater flexibility in the level and type of support offered to meet changing needs. There is a gap in demand in the Waveney area for all types of supported housing.	£70 million in 2024/25 for people living in supported housing We are already working with providers to reshape their portfolios of services, drive sustainability, increase numbers of employed staff and reduce the dependence on agency staff.	Average cost per service user	Business Intelligence Data	**£1,731.54** per week.	2% reduction to **£1,696.91** per week	
				Mental Health contract is being reprocured and will establish baseline and start monitoring by the end of 2025.	Data source to be determined	To be confirmed	To be confirmed	

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Extra Care Housing	Extra Care Housing (ECH) is where individuals have their own front door and own facilities, with some shared communal facilities such as a lounge, assisted bathrooms, laundry. The care provided is regulated by CQC and there is a 24/7 staff presence. These settings facilitate a practical alternative to residential care. Individuals can either own or rent the accommodation. • 24 housing schemes with care and support being delivered by 6 Providers. • A total of 841 units; 90 that are two-person flats and 751 are single occupancy. • Most schemes are centred around larger towns (e.g, Ipswich, BSE, Newmarket) • This accommodation offer is primarily for older people although some will now take people with a learning disability. • 50% of people are funded by ASC (421 customers).	The current age limit for Extra Care Housing (55 years and above) can make it challenging in terms of restricting accommodation offers for adults below this age. Current demand for this type of accommodation frequently exceeds capacity and we would welcome new services,	Annual spend was £15m in 2024/25 Re-modelling of how care and support are offered is taking place with individual providers to ensure services are appropriate and sustainable.	Number of Extra Care units.	Accommodation Strategy	To be confirmed when published in Autumn 2025		
				Increase in total number of ASC customers in Extra Care Housing	Business Intelligence data	**473**	**500**	
Day, Evening and Weekend Opportunities	Mainly available for people with LD & A and older people. People with LD&A are supported to learn new skills, and to socialise with others. Approximately 1000 ASC funded people with LD & A access day services from 52 providers who offer a range of service	Good range and quality of LD & A services although some lack a 'progression' focus to ensure people maximise their independence. In the absence of a Suffolk-wide Employment Pathway,	£10.5m spend Providers are encouraged to set sustainable rates when in the process of being Accredited.	Number of people using day opportunities.	Business Intelligence Data.	**1270**	No target to reduce or increase as requires more information to establish need/ demand.	

	types throughout the County, although these are spread unevenly (*eg* Care Farms) with some areas better served than others. There are 18 Day services for other customer groups, 16 for older people and two for people with Acquired Brain Injury. There are approximately 120 ASC -funded customers attending these services. There has not been an In-house Day Ops service since 2012 which has enabled the market to be largely shaped by providers themselves and service user demand.	Day Ops are sometimes seen as the only option for working age adults. ASC make most of the referrals for people with LD&A. For older people there is often a larger % of private funders than ASC referrals (*NB* no guarantee of referrals from ASC for either service types). Market Engagement would be particularly beneficial for Older People's Day Ops services to establish if there is any need for further development to improve access for all people wanting to attend such services. A more robust Accreditation process will be introduced by ASC that is likely to request a Business Plan and a requirement to initially build up the business with private/DP customers prior to ASC commissioning. As there is no guarantee of referrals by ASC providers are required to market their offer directly. Potential gaps in provision include those for people with behaviours that challenge.		New performance measures to be introduced as part of a new contract by end of 2025	Contract management	N/A	To be confirmed	

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Micro-Enterprises	Microenterprises are sole traders or businesses with an annual turnover less than £250,000 and no more than 8 employees. There are over 100 microenterprises in Suffolk that are working directly with Community Catalysts. They primarily provide people with home care and community support Community Catalyst's support microenterprises to 'set up' and be compliant with their duties. People pay using a Direct Payment or as a self-funder. 'Small Good Stuff' is a directory of microenterprises managed by Community Catalysts to facilitate individuals sourcing appropriate care options for themselves.	New Microenterprises are 'onboarded' by Community Catalysts onto their 'small, good stuff' directory. This is an area that we wish to develop; through the increased use of Direct Payments and promoting choice and control for Suffolk residents. Microenterprises have proved effective in meeting need in hard-to-reach rural areas	Micro-enterprises are funded via Direct Payments, and it is not possible to report on total spend.	Number of micro-enterprises	Community Catalysts – KPI	**114**	**150**	