



SURREY
COUNTY COUNCIL

Care within the Home Market Position Statement

Updated February 2024



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Market overview

The profile of the Surrey home care market is as follows:

- on 1 February 2024 there were 297 CQC registered community-based adult social care services. Of these, 244 were registered as homecare agencies supporting mostly older adults and 53 are registered for homecare and/or supported living supporting younger adults with disabilities or mental health support needs
- of these providers, 112 Surrey based providers have joined the Surrey County Council's Care within the Home DPS framework. Surrey County Council also contracts with 79 homecare agencies that are registered outside Surrey, mostly in adjoining local authority areas such as Hampshire and London Boroughs of Croydon and Kingston
- of the 191 (as of February 2024) CQC registered homecare branches that have joined the Surrey County Council's Care within the Home DPS, the majority are small local providers owned by private individual owners with only one or two local branches
- there are 13 branches which are small privately owned companies but operate as franchises of larger national 'brands' for example Bluebird Care, Caremark and Everycare
- there are 12 branches which operate as part of large national or regional organisations with multiple branches, and two of these are owned by overseas large multinational companies. There are six branches owned by private equity institutional investors, these branches operate locally but are backed by well organised financial backers
- there are also two branches owned by a charity and a housing association respectively. In summary, there is a large variety and spread of ownership and there is not an overreliance on a single organisation for delivery of care

Surrey County Council ASC, jointly with the NHS in Surrey, have well established contracting arrangements for domiciliary care via a Dynamic Purchasing System (DPS) which commenced in October 2021. As of February 2024, there are 191 CQC registered branches approved on the contract to provide regulated homecare and live in care to residents in Surrey. Providers have signed up to cover areas of Surrey split along existing postcode areas, of which there are 94. There is adequate coverage in all the 94 postcode areas with competition for work from multiple providers. This is important when considering business continuity and choice within the market and for residents.

Due to exceptional levels of interest from CQC regulated homecare agencies from across the country, the DPS was closed to new applicants in December 2023. The DPS can open again if there is an identified shortfall of care services in the county. The decision to close the DPS was taken with the care provider market following conversations about quality and competition. It was agreed that with levels of commissioned hours from the local authority remaining consistent, consolidating good provision was a priority alongside supporting sustainable growth of good care providers in the area. This approach will enable us to maximise existing available care hours and support improved workforce retention in the sector. This approach will also support our Greener Futures agenda as we look to consolidate business ultimately reducing travel requirements.

Prospective providers of homecare should [register with the Proactis portal](#) to be updated when future opportunities are advertised.

Of the providers that have joined the DPS:

- the majority (155) are rated good or better, with 21 rated as requires improvement and 3 rated inadequate
- the remainder are not yet inspected by CQC
- providers that have received a poor rating are supported to improve services by Surrey County Council as required through a formal provider support and intervention process
- the Surrey County Council's Quality Assurance Team also visit providers regularly to provide support and guidance and they also visit all new providers that have been approved to join the contract but have not yet been inspected by CQC

Any providers that are rated Inadequate by CQC who are on the contract are immediately suspended and no further homecare packages awarded to them. Any providers who wish to apply to join the contract rated inadequate are unable to do so until their rating improves. Surrey will, through the Provider Support and Intervention Protocol and through our experienced team of commissioners work with providers to improve their service, improve their CQC rating and consistently strive for excellence in service delivery.

Purchasing levels and categories

Surrey County Council purchase around 4,000 packages of homecare this includes 165 live in care packages. Most homecare packages that Surrey County Council purchases are to support identified care needs of older people. Homecare packages are also purchased to support residents with learning disabilities, physical disabilities and mental health support needs.

Of the 4,000 homecare packages purchased as of 1 February 2024:

- 190 supported people with mental health conditions
- 260 supported people with a learning disability and/or autism
- 740 supported people with a physical disability
- 2,650 supported older adults
- 165 were live in care packages (all client categories)

A total of 57,352 hours of homecare were purchased per week (this figures changes on a daily basis). The average weekly number of hours purchased per resident was 15 hours, ranging from 0.5 of an hour to 240 hours a week.

The NHS purchases around 300 packages of homecare a week.

Challenges and opportunities in the market

There is currently an overprovision of homecare in the Surrey market. This oversupply is demonstrable through the large number of new homecare branches registering and establishing themselves in Surrey. Surrey is known for having a large self-funder market but the market for local authority funded work is, as previously stated, consistent therefore not warranting such an increase in provision. New entrants to the market often have an adverse effect in the movement of workforce and the quality of service being offered with new branches and agencies requiring time to establish themselves. This was a major consideration when closing the current DPS.

Also, due to the relative ease, of setting up a homecare agency and with increasing staff mobility, many homecare agencies from across the country are attracted to working in the Surrey market.

Many homecare agencies have been awarded a sponsorship licence by the Home Office/UK Visas and Immigration this has allowed them to recruit many staff from overseas. This has presented challenges for commissioners when working with providers who have excess capacity. This type of recruitment has also seen a small number of allegations of worker abuse and modern slavery and these issues are followed up by Surrey Police.

Surrey County Council continues to share [details and guidance with the provider market](#) via a dedicated webpage.

Future opportunities for the care within the home sector are being explored to ensure the workforce opportunity is maximised and new approaches to care delivery can consolidate good business growth. We have utilised discharge to assess and hospital discharge funding to provide block care hours which have proved popular with the market ensuring guaranteed volumes of business and payment that support workforce retention good business development. We are currently in the process of seeking new opportunities for the sector including, but not limited to, the following areas:

- Extra Care and Accommodation with Care and Support (Right Homes, Right Support) care contracts
- hospital discharge support – wrap around support for care homes, bridging services and reablement