



**People overview
Scrutiny Committee
22nd April 2026**

Performance
Monitoring report –
Quarter 4 25/26 Care &
Wellbeing

Public

Performance Monitoring Report – Quarter 4 25/26

Care and Wellbeing

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Cabinet Member (Portfolio Holder):	Ruth Houghton		

1. Synopsis

- 1.1 Care and Wellbeing continue to operate in a complex and challenging environment, shaped by demand, increasing complexity of need and financial pressures. This report provides Members with a clear overview of how the Council is managing care package reviews, responding to the financial impact when residents' financial resources reduce, and addressing the risks associated with unpredictable demand and spend. It also clarifies the Council's role in supporting informed choice and earlier conversations with residents and families about care, housing and financial planning for later life.

2. Executive Summary

- 2.1 This report provides assurance on how Care and Wellbeing services are managing care package reviews, financial pressures arising from changes in residents' personal circumstances, and unpredictability of demand and spend within the system. It also clarifies the Council's role in supporting informed choice and earlier planning for later life.
- 2.2 Through this report we will:
- Review the volume and status of outstanding reviews alongside the factors contributing to delay.

- Provide an update on the financial impact to the Council in relation to self-funders and when their capital reduces below threshold.
- Set out the council's role in supporting choice in line with Care Act 2014 duties. This includes ensuring that individuals and families are aware of the full range of care and support options available, and that they understand the longer-term consequences of those choices.
- Highlight managing unpredictable spend, exploring how demand is forecast using demographic trends, public health intelligence and operational data, while acknowledging areas of unavoidable uncertainty.

3. Recommendations

- 3.1 Note the contents of this report and take assurance on how Care and Wellbeing is managing care package reviews, including the use of a risk-based approach to prioritisation, performance oversight and statutory compliance.
- 3.2 Endorse the Council's current approach to managing financial pressures arising from capital reduction, self-funding transitions and unpredictable demand and spend, including the use of forecasting, scenario planning and strengthened financial and operational oversight.
- 3.3 Support the continued implementation of the revised Deferred Payment Agreement arrangements, noting the progress made in strengthening governance, consistency, customer experience and financial sustainability.
- 3.4 Support the Council's approach to meeting its duties under the Care Act 2014 in relation to information, advice, informed choice and planning for later life, in line with the new Care and Wellbeing operating model.
- 3.5 Note the completion of the Day Services public consultation and agree that officers proceed to analyse consultation feedback and bring a further report to Cabinet setting out options and recommendations in due course.

4. Risk Assessment and Opportunities Appraisal

- 4.1 The primary risks associated with the matters set out in this report relate to Care and Wellbeing services demand, increasing complexity of need and associated financial pressure.
- 4.2 Delays in completing care package reviews, if not effectively prioritised and overseen, could result in support arrangements that no longer fully reflect individuals' current needs or circumstances, with potential impacts on wellbeing, safeguarding and financial exposure.

4.3 Financial impacts from unpredictable demand, including capital reduction, self-funding transitions, crisis-driven care and carer breakdown, which can crystallise rapidly and place in-year pressure on budgets.

4.4 Risk table

<i>Risk</i>	<i>Mitigation</i>	<i>Link to Strategic Risk</i>
Unpredictable demand and spend, can create in-year financial pressure and volatility.	Strengthened forecasting, scenario planning and close joint oversight between Care and Wellbeing and Finance. Regular monitoring of emerging pressures, active demand management and alignment with the Medium-Term Financial Strategy to identify and mitigate risks early.	Financial Sustainability; Demand Management
Increasing numbers of people moving from self-funding to Council-funded care may impact costs rapidly and increase budget pressure.	Improved tracking and analysis of capital reduction cases, clearer processes for financial assessment and earlier engagement with residents and families to support planning and informed decision-making.	Financial Sustainability; Demographic Change
Weak governance or inconsistency in Deferred Payment Agreement (DPA) arrangements could expose the Council to financial and reputational risk.	Implementation of the revised DPA policy, including clearer eligibility criteria, revised charges on a cost-recovery basis, improved end-to-end processes and stronger joint working between Care and Wellbeing, Finance and Legal Services.	Governance and Compliance; Financial Controls

5. Financial Implications

5.1 Shropshire Council continues to manage demand and financial pressures, and a financial emergency was declared by Cabinet on 10 September 2025. The overall financial position of the Council is set out in the monitoring position presented to Cabinet on a monthly basis. Significant management action has been instigated at all levels of the Council reducing spend to ensure the Council's financial survival. Care and Wellbeing services will develop its new operating model identifying programmes of work that deliver good outcomes for residents and value for money.

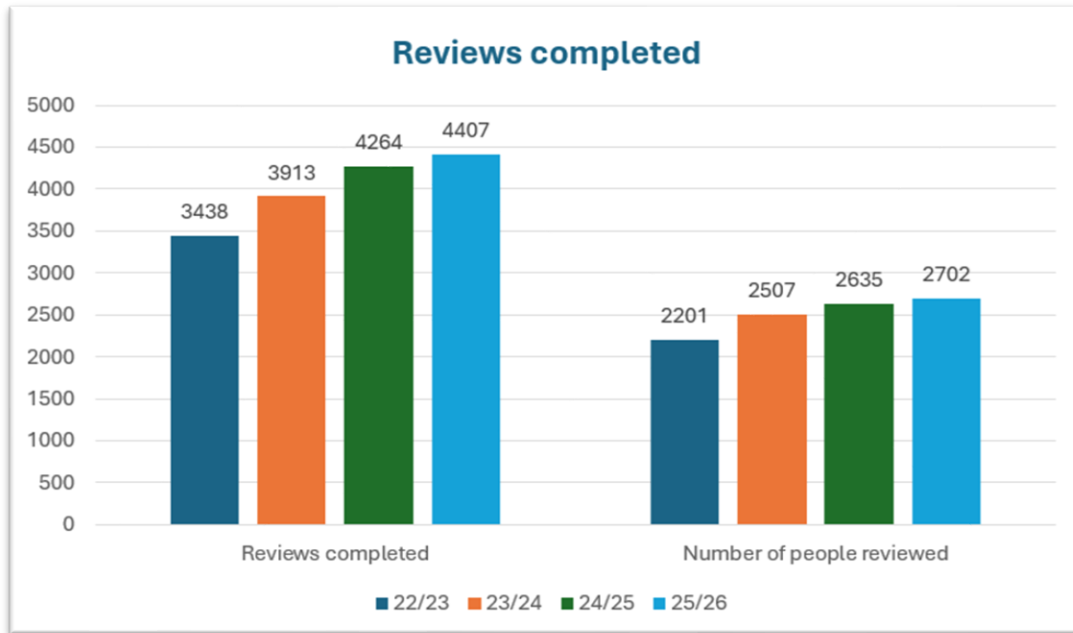
6. Climate Change Appraisal

- 6.1 The matters set out in this report relate to the management, oversight and assurance of existing Care and Wellbeing services and do not involve new capital investment, physical infrastructure, or changes to service delivery that would materially affect carbon emissions. The proposals are therefore assessed as having no material impact on climate change. Any indirect effects are neutral to positive, as the emphasis on prevention, early information and advice, community-based support and digital access may reduce reliance on crisis-driven interventions and unnecessary travel. Overall, the report is consistent with the Council's climate objectives and does not give rise to adverse environmental impacts.

7. Background

Care Package reviews

- 7.1 Reviews remain essential to ensuring that care packages are appropriate, proportionate and reflect current need.
- 7.2 We recognise that we continue to have overdue reviews having made significant progress over the last two years. In our last report we detailed impacts of capacity in relation to demand. We have put in place clearer oversight in relation to risk management and an action plan to reduce the backlog, with evidence of improved performance. We do this through prioritisation, with higher-risk cases, safeguarding concerns and significant changes in need progressed first. Where a formal review is delayed, professional oversight and welfare monitoring remain in place, and risks are actively managed by operational teams.
- 7.3 This year we have had maximum of 5176 residents receiving a funded service across Care and Wellbeing, this is a mixture of short and long-term services. Currently there are 3689 with a long-term service. Since 1st April 2025 we have completed 4407 reviews, these will be a combination of 12 week and annual reviews. You will see year on year we have continued to make progress. With some people having more than one review in year for many reasons.
- 7.4 This year over 25% of the Contacts received were for people with an existing service in place, in many cases a review would have been completed which will impact on the number of annual reviews we can achieve.



Care Package Reviews – Controls in place

Position	Commentary	Controls / Assurance in Place
Currently 84% of people with overdue reviews remain in receipt of commissioned care	Currently 36% are recorded as overdue for review, who continue to have an active commissioned service in place. These means there is an active provider able to escalate concerns if circumstances change - see breakdown of services further in the report	Provider escalation routes; operational teams retain oversight; safeguarding pathways remain active Those without a commissioned service fall into section 117 category and will have primary care oversight
Section 117 aftercare reviews demonstrate active progress	Of 210 people in receipt of Section 117 aftercare, 60% have received a review within the year, with 82 people overdue, none exceeding two years, and a work plan in place to clear the backlog focussing on longest waiting as a priority	Dedicated work plans; monitoring through performance reporting, increase in allocations to carry out joint reviews with ICB

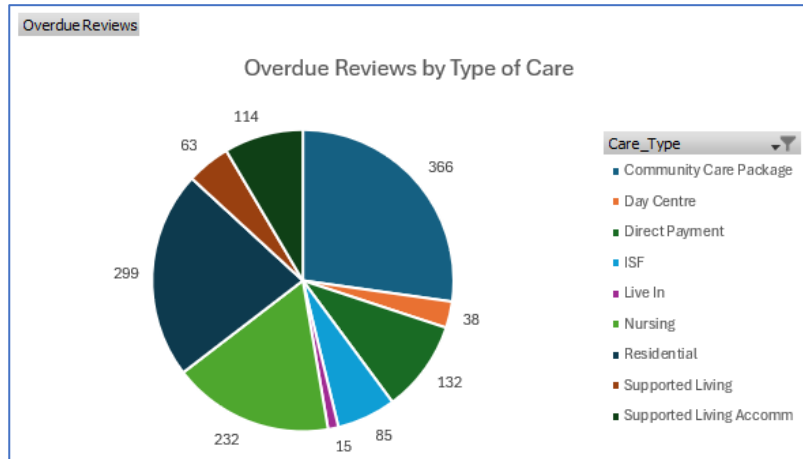
Targeted review work has reduced back logs	No outstanding reviews for people placed out of county, increased allocation of reviews reducing longest waits	Weekly monitoring of review performance, improvement plans
Demand and capacity	Performance reporting links delays to increasing demand for new Care Act assessments and rising complexity, requiring prioritisation of higher-risk cases	Risk-based prioritisation; senior management oversight; demand management activity

Assessment of support currently provided from Review data

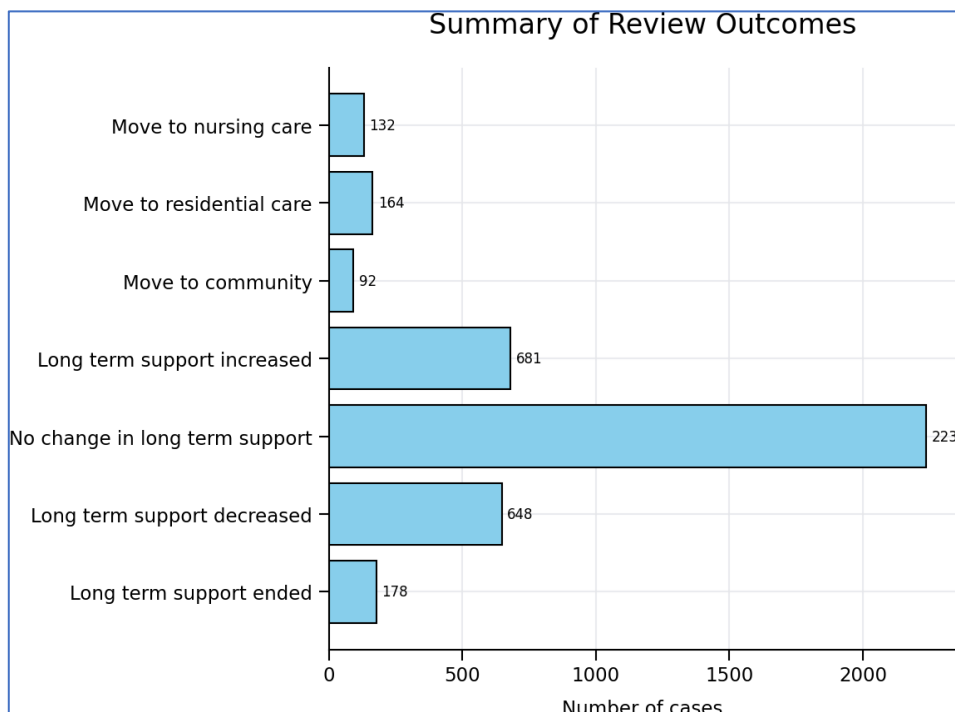
- 7.5 We recognise that when reviews are delayed, there is a risk that support plans may not accurately reflect changes in an individual's needs, circumstances or outcomes. This is particularly important when needs deteriorate or informal support arrangements change. To address this, we employ risk-based prioritisation and robust oversight. Furthermore, we work closely with providers and ask them to contact us immediately if there is any change in need, whether an increase or decrease, as a mitigation to ensure care remains relevant.
- 7.6 The current position shows a total of 1,344 overdue care package reviews, distributed across a range of service types. The largest volumes are within Community Care Packages (366), Residential Care (299) and Nursing Care (232), which together account for nearly two-thirds of all overdue reviews. This reflects the scale and complexity of long-term support arrangements within Care and Wellbeing, especially for older adults and people with higher levels of need.
- 7.7 In the year 2025/26, we have received 150 referrals from the Integrated Care Board (ICB) where health-related funding has ended or integrated funding splits have required reviews. These referrals tend to arrive in clusters rather than in a steady flow, placing additional pressures on teams. Deadlines are set for health funding to end, necessitating swift action. The individuals involved are often more complex, particularly in relation to learning disabilities and mental health.
- 7.8 Community-based support, including Community Care Packages, Direct Payments, Individual Service Funds (ISF's) and Supported Living, represents a significant proportion of the overdue reviews. This is consistent with the higher overall volume of people supported in community settings, where there is reliance on stability of need, provider escalation and practitioner oversight.
- 7.9 Overdue reviews in Residential and Nursing Care are subject to additional safeguards, such as regular provider reviews, care home oversight by Care Quality Commission (CQC) and Contract Monitoring Officers, safeguarding arrangements and, in many

cases, Deprivation of Liberty Safeguards (DoLS) authorisations. These measures provide interim assurance while formal reviews are scheduled. Of the 531 overdue reviews in nursing and residential placements, 239 have had a DoLS assessment in the last 12 months. To maximise efficiency and capacity, we allocate residents with an overdue review in the same care home to the same practitioners.

7.10 Smaller cohorts, such as Live-In Care and Day Centre provision, represent a relatively low proportion of the overall risk profile. Nevertheless, they still require targeted action to ensure reviews are completed and properly recorded.



7.11 The Council has a clear, risk-based and time-bound plan to reduce overdue care package reviews. Progress is being made against overdue reviews, higher-risk cases are prioritised, and leadership oversight ensures that care remains safe, appropriate and compliant with statutory duties while improvement activity continues.



7.12 The above summary is the outcomes from reviews completed, it provides assurance that the review process is largely maintaining appropriate support, making balanced adjustments where needed, and supporting independence, supporting people to remain at home and limiting moves into higher-cost residential and nursing care.

Supporting Choice

7.13 Our duties under Section 4 of the Care Act 2014 are to ensure that adults, carers and families across the county have access to clear, timely and accessible information and advice about care and support. This duty applies to all residents, including those who fund their own care, and is central to enabling informed choice, independence and wellbeing.

7.14 We support informed choice by helping individuals understand the full range of options available to them to meet their needs. This includes preventative and community-based support, informal and voluntary sector services, short-term enabling interventions and, where necessary, longer-term statutory care. Information and advice are provided in a way that reflects the needs of a large and diverse rural county, using a mix of digital information, community-based advice and direct conversations with skilled practitioners in our Let's Talk Local hubs or at home. Our Shropshire Choices Support Finder is updated annually and provides comprehensive information about local resources and how to navigate the care market [Shropshire Choices Support Finder | Care Choices](#). This includes what is available across Shropshire's voluntary sector service, local transport provisions, information about technology and assistive gadgets, it also details what to expect if you need input from Care and Wellbeing.

7.15 Our practitioners use strengths-based approaches to ensure that people understand how different options may support their outcomes, independence and quality of life. This includes being clear about the potential consequences of different choices, such as reliance on informal support, the sustainability of care arrangements, and the impact of decisions on longer-term wellbeing and safety.

7.16 We also have a specific role in supporting people to understand the financial implications of their choices. This includes providing information and advice to self-funders about purchasing care, managing capital, understanding the local care market and accessing appropriate support at a reasonable cost. This ensures that decisions are made with a clear understanding of responsibilities and risks, reducing the likelihood of crisis or unplanned intervention. Our web page has helpful information for self-funders and directs them to relevant guidance. [Paying for your own care | Shropshire Council](#)

- 7.17 Carers are recognised as key partners in supporting choice in Shropshire. The Council works to identify carers early, ensure they are aware of their rights to assessment and support, and involve them in planning and decision-making. This includes supporting carers to understand the implications of different care options and putting contingency arrangements in place to reduce the risk of carer breakdown and to support them to sustain their caring role if this is their wish.
- 7.18 Overall, Shropshire Council's role is not to direct individuals toward a single solution, but to ensure that choices about care and support are informed, realistic and sustainable. By meeting its Section 4 duties through accessible information, advice and strengths-based practice, we enable residents to make decisions that support independence and wellbeing while ensuring statutory responsibilities are met in a fair and proportionate way.

Planning for later life

- 7.19 We recognise the value in supporting our aging population to plan for later life, ensuring they have access to the right information as early as possible can help ensure they make the right choices and have contingency and emergency plans in place to prevent a crisis. We already know that Shropshire has one of the oldest populations in England, with our 75+ population projected to grow by 15-18% over the next 5 years, this can be as many as 6000 – 8000 additional older residents. This cohort is the group most likely to require care and support and already equates to almost 50% of our annual referrals.
- 7.20 Through the new proposed Care and Wellbeing operating model, Shropshire Council will provide information and advice at multiple points to support early planning and informed choice, in line with Care Act duties. For example, residents will be able to access digital information and self-assessment tools to understand housing options, community support and assistive technology before needs escalate; receive face-to-face advice through community venues and outreach sessions on issues such as remaining in their own home, have strengths-based conversations to understand options such as short-term enabling support, community services or self-funding arrangements. This ensures people and carers understand the implications of different choices for independence, wellbeing and financial sustainability before statutory intervention is required.

Forecast of demand and spend

- 7.21 Key drivers of demand are an older adult growing population, supporting carers and increased complexity, self-funders falling below threshold and people being referred from health services.

- 7.22 The Council does not assume that demand itself can always be reduced. Our focus is to work with internal council services and partners to prevent late presentation, crisis-driven contact and unplanned escalation, understanding the likelihood of more costly support rather than early, planned and preventative support.
- 7.23 The new proposed Care and Wellbeing operating model will have a focus on prevention and earlier intervention providing early information and advice, prevention, community-based support and proportionate screening is expected to have an impact on managing demand for services. We also aligning the delivery model with commissioning attentions to provide flexible options to support people with complex needs.
- 7.24 System pressures can contribute to volatility. Pressures in hospitals, primary care, mental health services or housing can impact demand into Care and Wellbeing at short notice so Service Managers along with finance colleagues review the notable seasonal variations in our forecasting as well as trends that may have been unforeseen to adapt mitigating actions.
- 7.25 Market instability is another source of unpredictability. Changes in provider capacity, workforce shortages, quality concerns or sudden market exit can force the Council to respond quickly, often at increased cost, to ensure continuity of care.

Demand and budget forecasting:

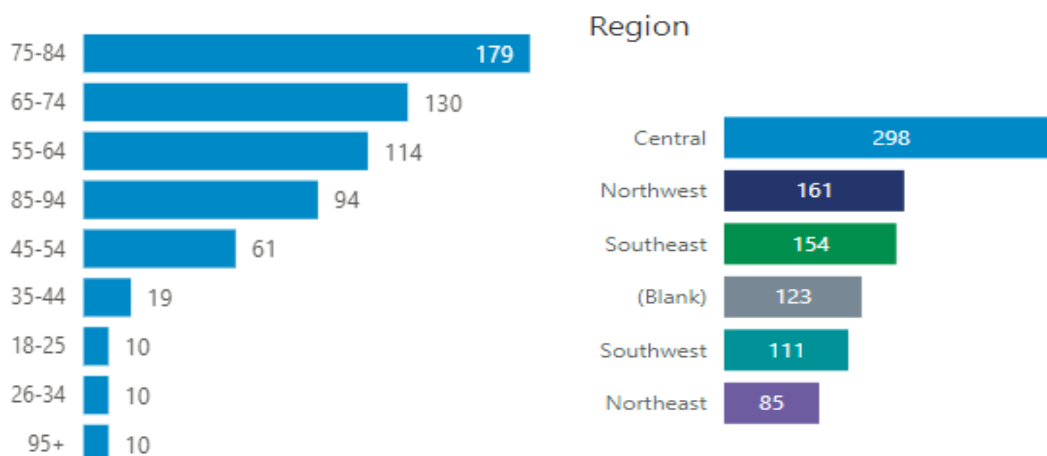
- 7.26 We work closely with our finance colleagues to monitor movement each period from existing and new spend captured via our Controcc system, this enables us to see number of people receiving all services and the average cost per person. This is analysed each month by Service Managers and anticipated demand built into projections with finance colleagues where we know of increased referrals or reviews on joint funded packages. There are monthly performance and finance Senior Management Team meetings to ensure governance in this area and collective action to understand the performance and financial position of Care and Wellbeing services.
- 7.27 A key area of unpredictable demand in the last two years is those who have been supported by our ICB through Continuing Health Care and Interim health funding, who are no longer eligible. This has seen a pressure on Care and Wellbeing demand and spend. In 24/25 this equated to £1.8m pressure, this year is looking higher and more like £2.5m. Partnership working and understanding of changes is key to working together to reflect anticipated demand and cost pressures across the system.

Carer demand:

- 7.28 We currently have 480 Carers who have agreed to be added to our Carers Register which is managed by Shropshire Carers Service. 23% are new to our service this

year. Below shows the area of the county referrals are from and the age range of those carers who have contacted us.

7.29 Almost 627 Carers have contacted us so far this year, with 437 progressing to a new referral, the teams have completed 348 Carers Assessments across the service, as part of the Care Act assessment for the cared for we will discuss the carers needs, mitigating against unpredicted carers demand.



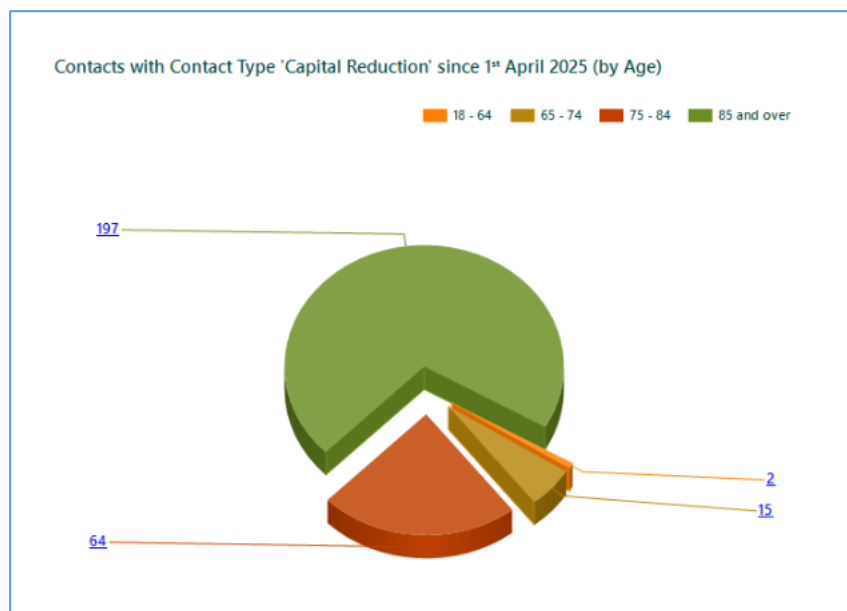
7.30 Our Carers team are working with voluntary agencies to understand and anticipate carers demand, and the service would aim to see more people on the Carers Register.

Capital reduction pressures:

7.31 We have detailed in previous reports that our data in relation to self-funders and those whose capital reduces below the threshold does require some development to accurately understand the true pressure and map out future demand. This is mainly because at the point of contact the reason may not be clear, and often it is not known that someone is a self-funder until they have been through the financial assessment process. We continue to work with partners across voluntary services such as Age UK and Health Watch to gather data relating to self-funders in Shropshire that may not be known to the council.

7.32 Since July 2025 we have been clearly tracking each week the new capital reduction requests into the council, this includes those whose capital have reduced receiving both care at home and in a placement setting, for 25/26 the financial cost of this is approx. £5m.

7.33 We continue to see rising capital reduction referrals year on year, with most being older population and high numbers already in care homes.



Deferred Payments update

- 7.34 Shropshire Council is now in the process of implementing the revised approach to Deferred Payment Agreements (DPAs), following Cabinet approval. The updated arrangements will strengthen ability to meet statutory duties under the Care Act 2014 while ensuring the scheme is operationally efficient, financially sustainable, and fair to residents.
- 7.35 The new approach is underpinned by an updated Deferred Payment Policy, which provides greater clarity on eligibility, charging, and process. It reflects current legislation and national guidance and addresses the need for more robust governance, consistency and transparency following a prolonged period without policy review and recommendations from a recent audit.
- 7.36 Key features of the approach in place include:
- Clear and consistent application of eligibility criteria, ensuring DPAs are offered appropriately and in line with statutory requirements.
 - Revised charges, including an updated one-off set-up fee, an annual administration charge and legal fees, designed to reflect the actual cost of administering DPAs over their lifetime. These charges are applied on a cost-recovery basis and are reinvested as staffing resource to support capacity and oversight within the service.
 - Interest applied from the point of contract signing, providing financial protection for the Council while remaining compliant with national regulations.
 - Streamlined operational processes, with clearer ownership across Care and Wellbeing, Finance and Legal Services, reducing delays and improving throughput of applications.
 - Improved customer experience, with clearer information, standardised documentation, and more timely progression of agreements.

- 7.37 The revised process has already resulted in improved application throughput and stronger end-to-end oversight, despite ongoing external constraints such as Land Registry timescales. The approach will also reduce administrative burden on social workers, allowing them to focus on assessment and care planning rather than complex financial processes.
- 7.38 The new Deferred Payments approach supports the wider Care and Wellbeing operating model by enabling earlier, clearer conversations with self-funders, reducing financial risk to the Council, and strengthening compliance with audit and governance requirements. It provides Cabinet with assurance that DPAs are being managed in a way that balances individual choice with financial sustainability and risk management.
- 7.39 All paperwork, letters and guidance have been updated and currently with legal for final approval, updated communications have also been sent to IT to update the council website so information available to residents is up to date.
- 7.40 DPA net financial spend 25/26 £338,000. With the total budget commitment for all DPA's standing at £2.2m. This includes charges invoiced for interests and administration charges which has increased the income to the council.

Day Services Consultation update

- 7.41 Cabinet approved a formal 8-week public consultation on the future of specific in-house day services on 21 January 2026. The consultation launched on 29 January 2026 and covered:
- the future of Helena Lane Day Service, including a potential option to close;
 - the potential transfer of Aquamira Day Service to the Abbots Wood site; and
 - wider public engagement on the reprovision and redesign of all remaining in-house day services.
- 7.42 The consultation finished on the 26 March 2026. All consultation responses are being collated and analysed by the Feedback and Insight Team. Once feedback has been analysed, a business case with an options appraisal will be completed. Then a cabinet report will be taken to cabinet to consider the recommendation. The final report and recommendation will be informed by:
- consultation feedback;
 - equality and impact considerations;
 - legal duties
 - financial and operational implications.

8. Conclusions

- 8.1 The report gives an overview of demand in relation to various areas of Care and Wellbeing services and the plans in place to manage advice, support offered to people and

how the service manages its budget and demand monitoring. The report highlights areas of demand pressures and the mitigations and plans to address this.

8.2 The Day Services consultation has ended; insights from the consultation will be analysed and a report will go to Cabinet.

List of Background Papers (This MUST be completed for all reports, but does not include items containing exempt or confidential information)

None.

Local Member: **Ruth Houghton**

Appendices

No Appendices.