Excerpts from the full set of slides which were used at Cordis Briefing on Thursday 19th April 2018. Full slides are available for subscribers. Please click here to find out more: http://www.cordisbright.co.uk/briefing.php

Cordis Briefing

April 2018

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Today's Briefing

- Introduction
- Viewfinder 2018 – Part 1
- Profiling the Not-for-Profit sector
- Social Care Green Paper
- Housing for Older People

BREAK

- SALT Data – Learning Disabilities Employment and Accommodation
- DoLS
- Viewfinder 2018 – Part 2

Cordis Viewfinder 2018

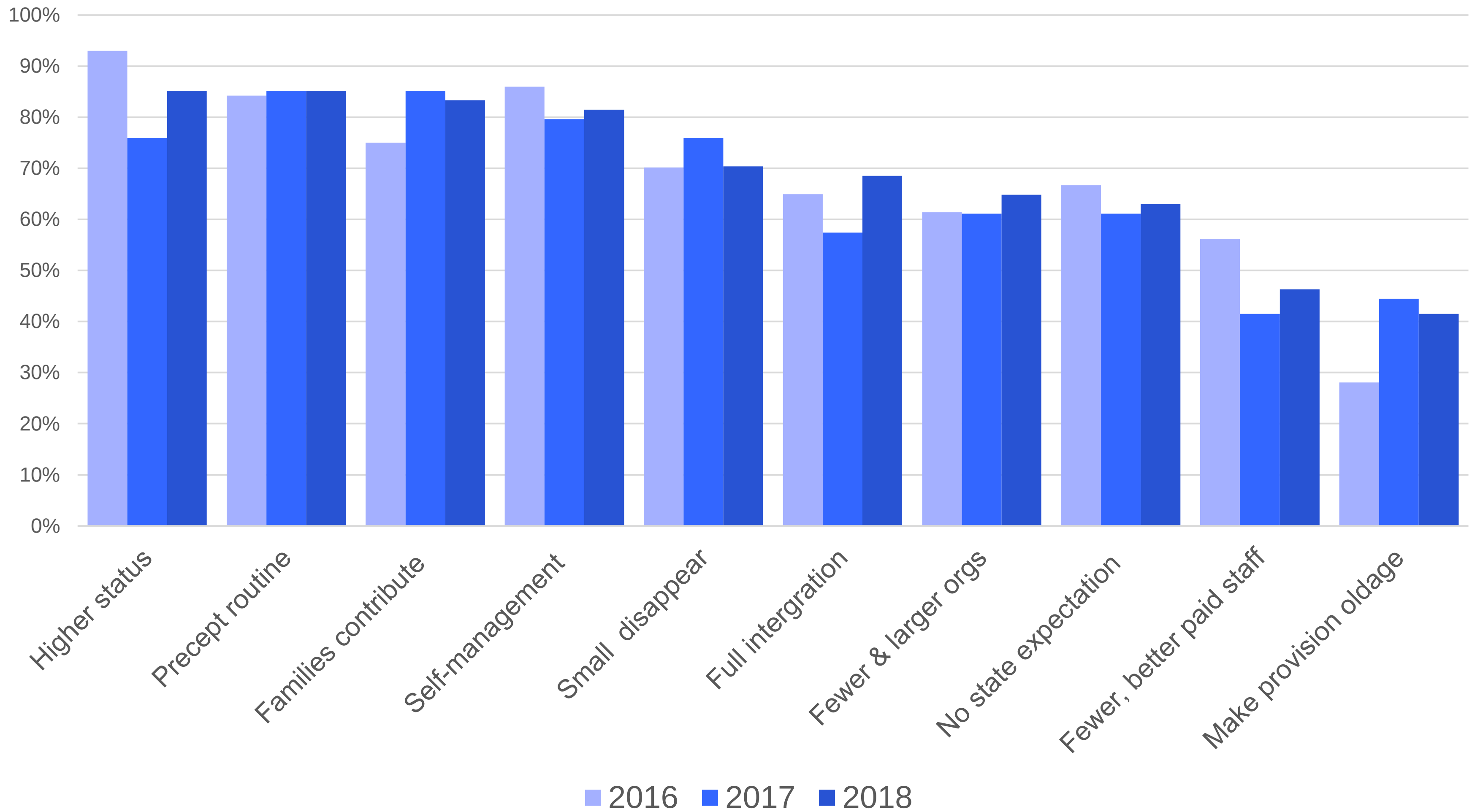
Cordis Viewfinder

- Been running in its current form for 11 years
- Aimed at senior leaders in the sector
- We ask around 120 people to complete it and we get 60% response rate
- Includes providers working with all client groups, all service types
- Provides a high level view of the sector and its trends

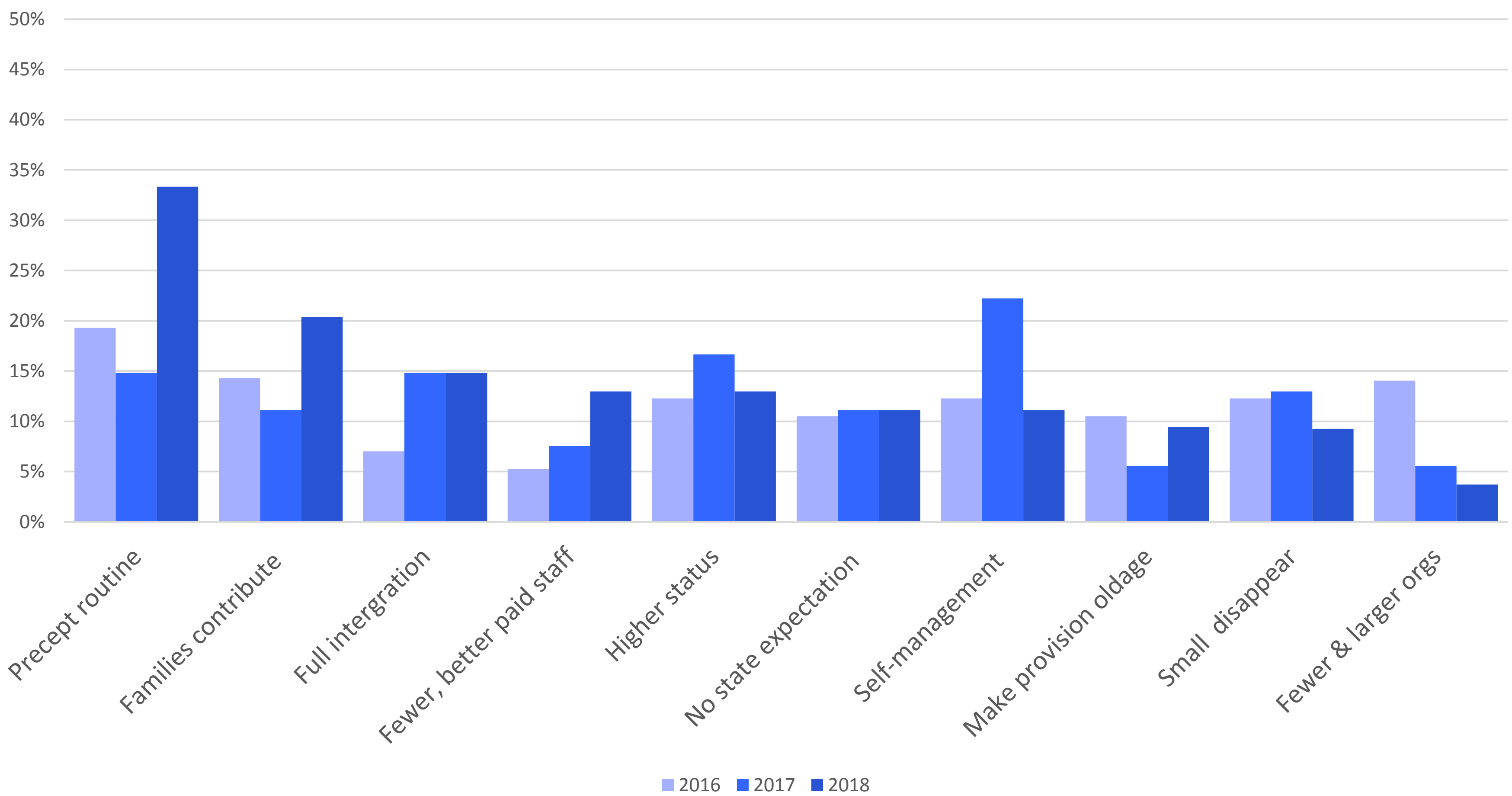
What it seems to be saying

- Some early trends are establishing themselves as the new normal for how you conduct your business, organise your workforce etc.
- The workforce ‘issue’ looks to be becoming even more critical than it was last year
- An extra £2billion (£600million this year) appears to have made a bit of a difference
- You seem to think that the Health/social care integration is more likely and perhaps therefore likely to have more impact on you
- You still think your key route to growth is other people’s business

Your thoughts on the future – likely and very likely



Your thoughts on the future –VERY likely



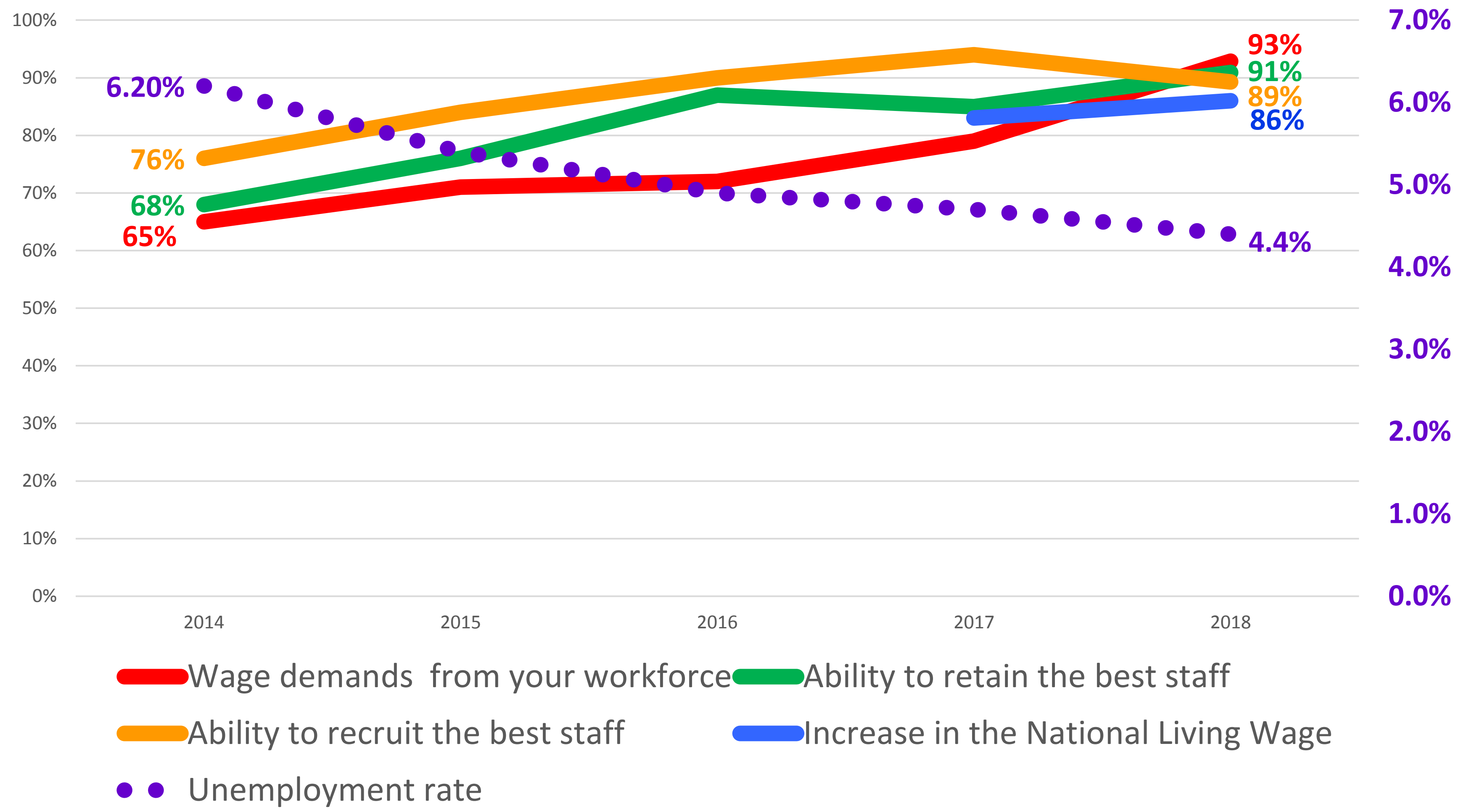
What does this mean for you

- A version of the status quo prevails
- There may be bits of extra money but there is not real commitment to a ‘new’ funding regime anytime soon
- There is a view that there is a chance in most parliaments to have an impact on the future direction of social care – the Green Paper looks like this parliaments opportunity
- Whatever goes into the final version of the green paper the final decision is a ‘political’ decision by the government of the day.

Money, people, jobs

- For the first time ever all your top four threats focus in the single area of workforce, where to get them, how to keep them and what to pay them.

Money, people and jobs



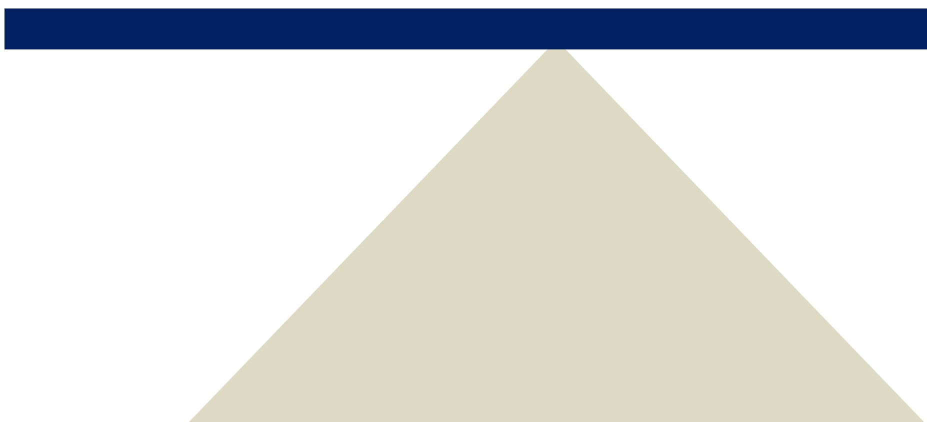
Corporate confidence in the future

- The single most optimistic group

Confidence in the next 12 months

Confident/ Very Confident

Cordis Bright Corporate Confidence Seesawometer®

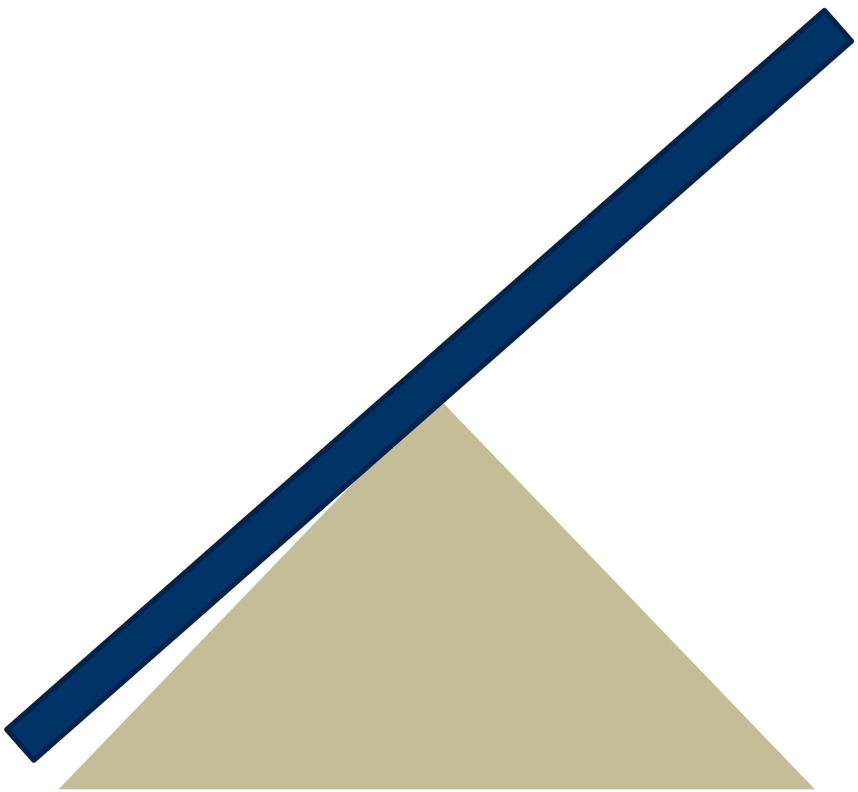


Very Unconfident/ Unconfident

2013

97%

Confident/ Very Confident



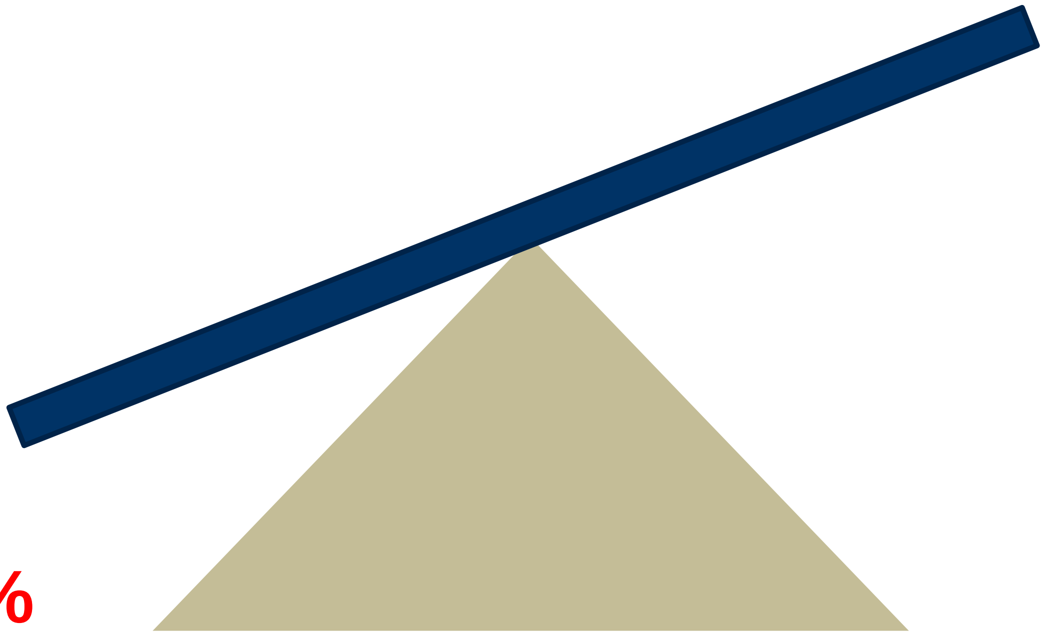
3%

Very Unconfident/ Unconfident

2014

Confident/ Very Confident

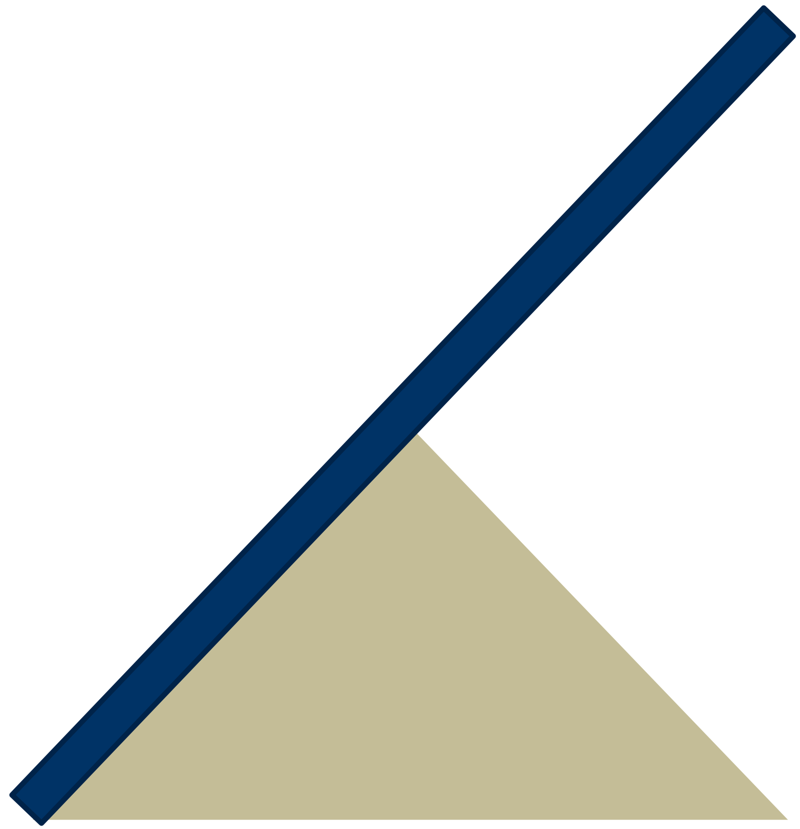
76%



23%

Very Unconfident/ Unconfident

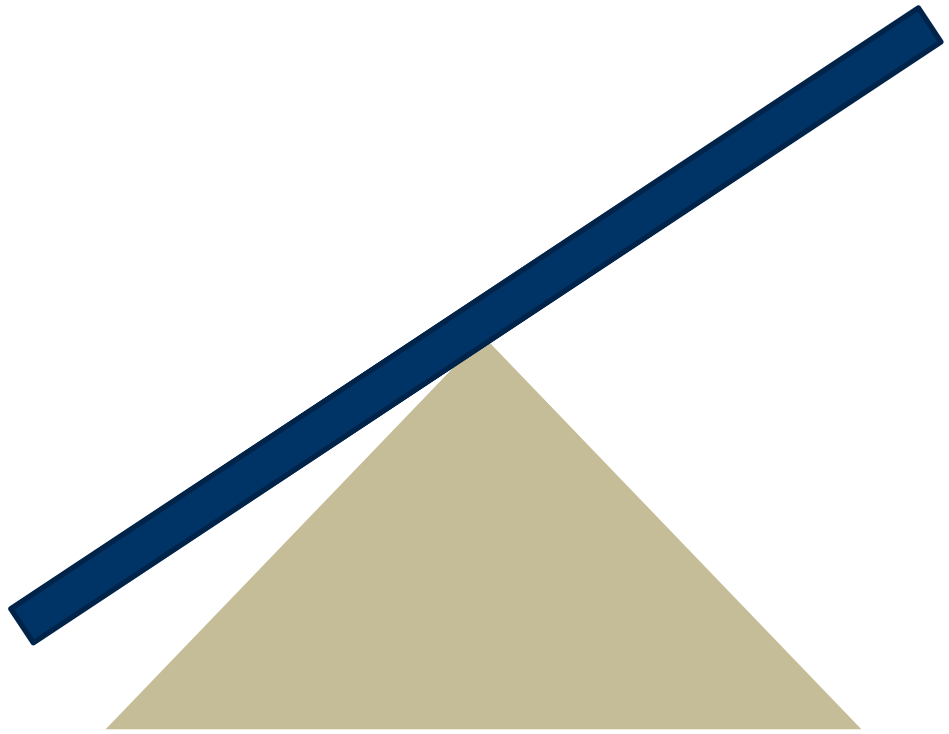
2015


Confident/ Very Confident
100%
0%
Very Unconfident/ Unconfident

2016

86%

Confident/ Very Confident



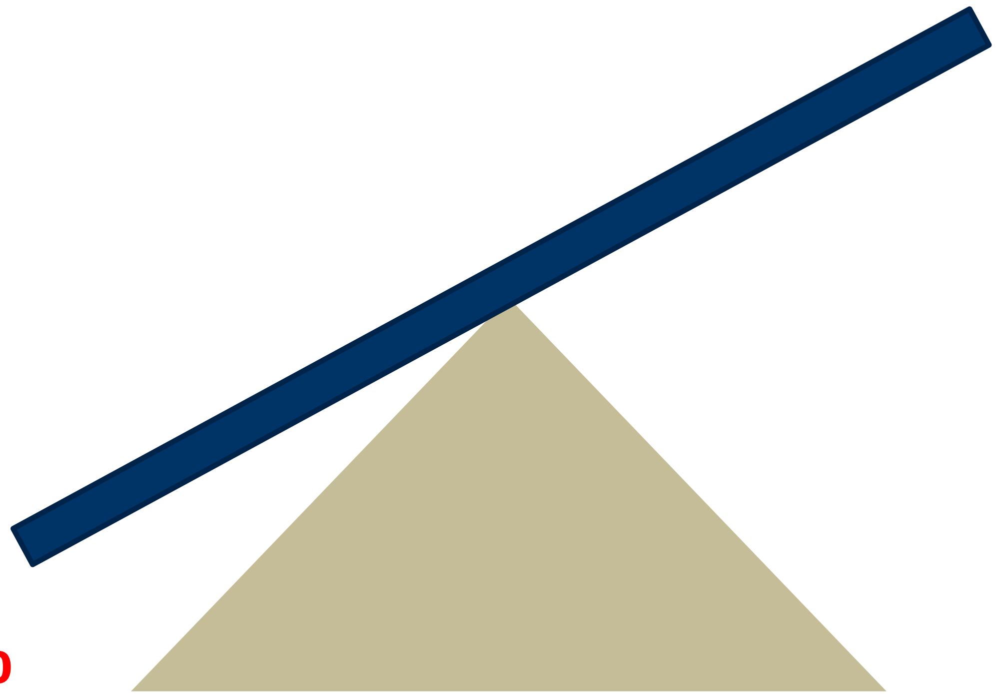
14%

Very Unconfident/ Unconfident

2017

85%

Confident/ Very Confident



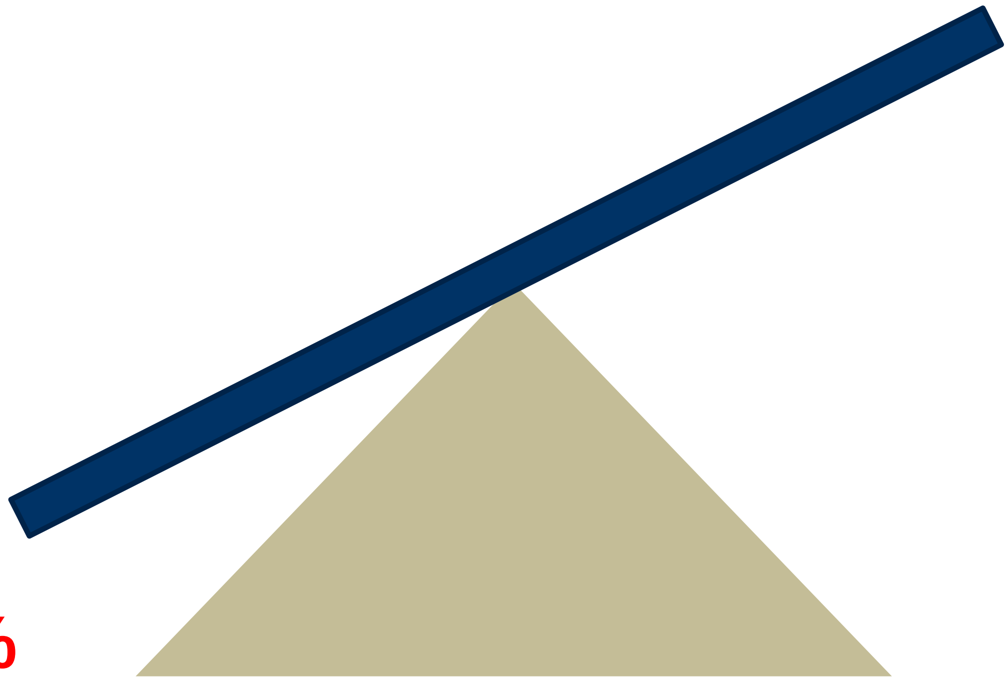
15%

Very Unconfident/ Unconfident

2018

82%

Confident/ Very Confident



18%

Very Unconfident/ Unconfident

Long Term Support – Learning Disabilities

Employment and Accommodation Data 2014-2017

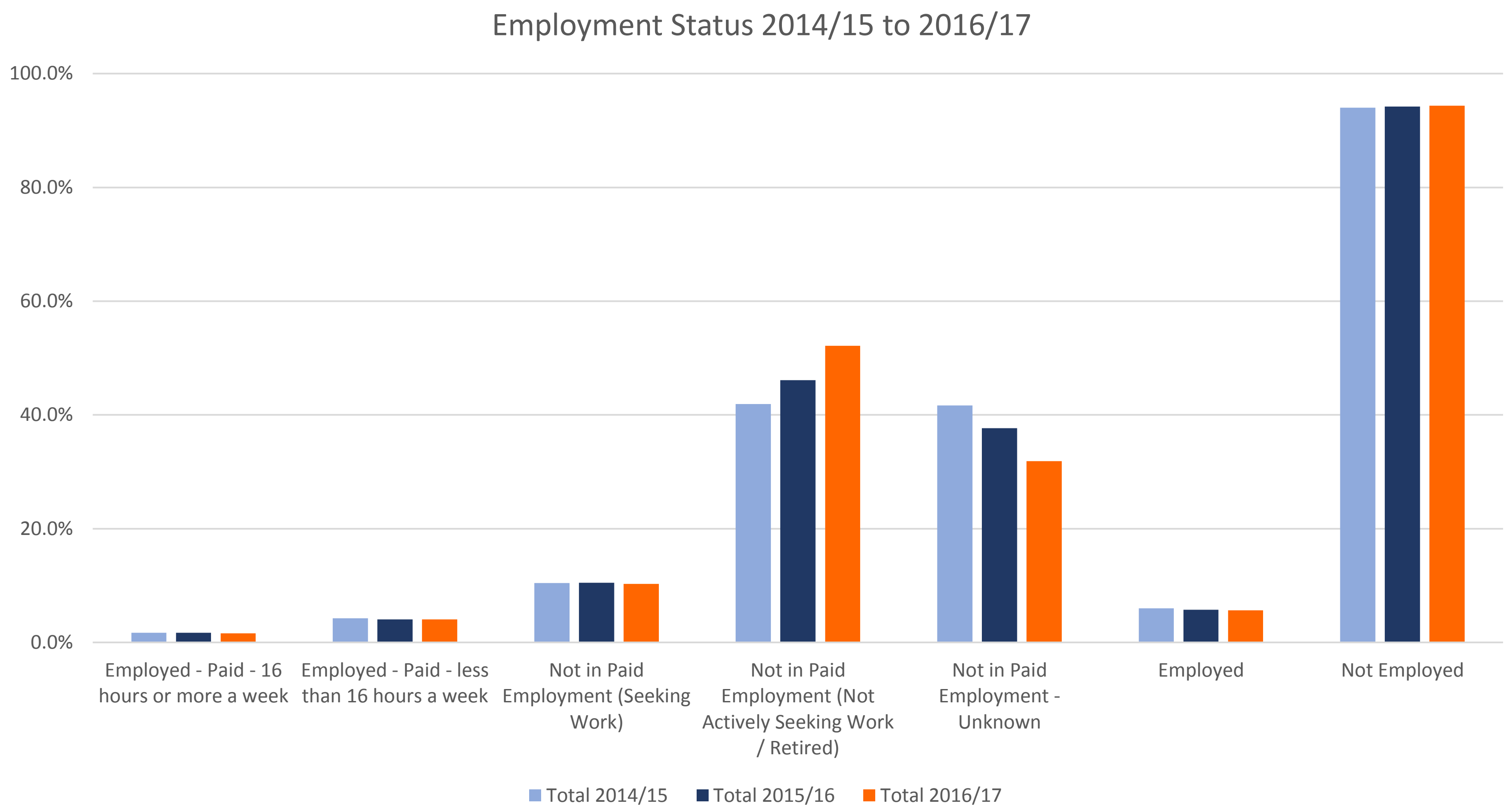
Introduction

- In the January briefing we looked at the data on short and long term care (SALT).
- Today we are returning to this data for a more detailed look at people with learning disabilities, as there are additional data available on employment and type of accommodation
- We are going to look at 2016/17 data and compare this with the figures for 2014/15 and 2015/16 where appropriate.

Employment

- There is data about the employment status of people with learning disabilities in the SALT data.
- This covers:
  - For employed people, hours employed
  - For people not employed, whether or not they are seeking work
- Overall, in 2016/17, 5.6% of people with learning disabilities were employed, a slight reduction since 2015/16 when the figure was 5.8%
- Over the period from 2014 to 2014, general **unemployment** has fallen from 6.2% to 4.7%

Employment


Employment Status 2014/15 to 2016/17
100.0%
80.0%
60.0%
40.0%
20.0%
0.0%
Employed - Paid - 16 hours or more a week
Employed - Paid - less than 16 hours a week
Not in Paid Employment (Seeking Work)
Not in Paid Employment (Not Actively Seeking Work / Retired)
Not in Paid Employment - Unknown
Employed
Not Employed
Total 2014/15
Total 2015/16
Total 2016/17

Employment – Top and Bottom LAs

Top LAs	Percent	Change
Bexley	21%	1%
Luton	19%	2%
Harrow	18%	-1%
Windsor and Maidenhead	18%	0%
North East Lincolnshire	17%	3%
Hartlepool	16%	1%
Bracknell Forest	16%	-1%
Hounslow	15%	-6%
Wokingham	14%	2%
Doncaster	14%	11%
Trafford	13%	0%
Shropshire	13%	1%
Warwickshire	12%	0%
Kirklees	11%	1%
Bedford Borough	11%	3%
Brighton and Hove	11%	-1%
Leicestershire	11%	7%
Wandsworth	11%	0%
Kingston upon Thames	11%	-2%
Stockport	11%	0%

Bottom LAs	Percent	Change
City of London	0%	0%
Isles of Scilly	0%	0%
Lambeth	0%	-1%
Rutland	0%	-16%
Sandwell	0%	-1%
South Tyneside	0%	-1%
Telford and the Wrekin	0%	-3%
Nottingham	1%	1%
Kingston upon Hull	1%	0%
Oldham	1%	-1%
Birmingham	1%	0%
Warrington	1%	0%
Wigan	1%	-2%
Manchester	1%	0%
Durham	2%	0%
Waltham Forest	2%	-6%
Middlesbrough	2%	0%
Walsall	2%	1%
Hammersmith and Fulham	2%	0%
Slough	2%	-5%

Employment – Change 2014-17

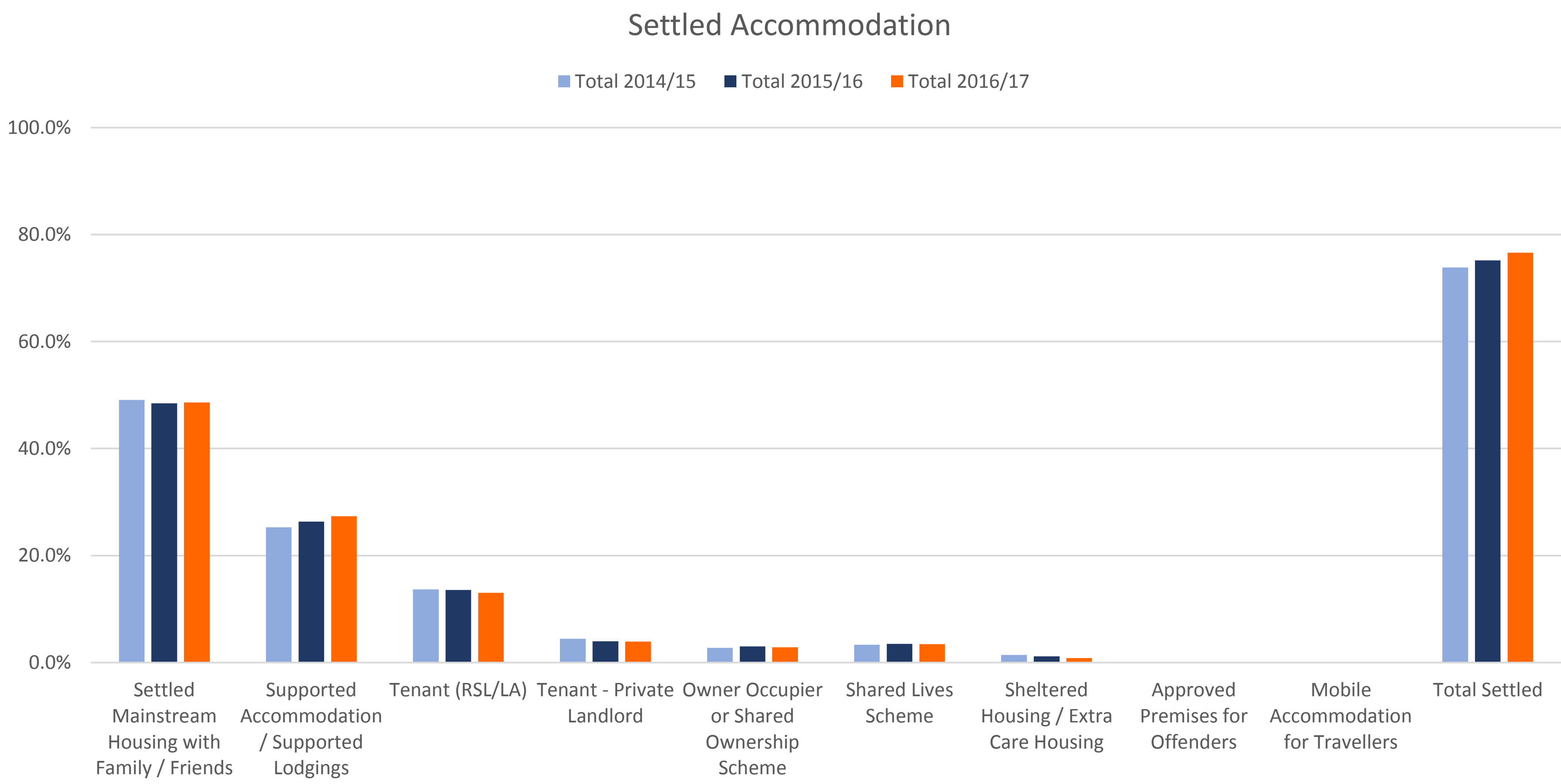
Name	2016/17	Change 2014-17
North East Lincolnshire	2%	15%
Leicestershire	2%	9%
Newham	4%	6%
Bedford Borough	6%	5%
Doncaster	10%	5%
Central Bedfordshire	5%	4%
Cornwall	0%	4%
Northumberland	3%	4%
Bexley	17%	3%
Bury	2%	3%
Stockton on Tees	6%	3%
North Tyneside	7%	3%
Westminster	5%	3%
Southend on Sea	8%	3%

Name	2016/17	Change 2014-17
Rutland	13%	-13%
Waltham Forest	12%	-10%
Wiltshire	12%	-7%
Kent	10%	-6%
Slough	7%	-5%
Kensington and Chelsea	15%	-5%
Hounslow	20%	-5%
Wigan	6%	-4%
Bracknell Forest	20%	-4%
York	12%	-4%
Herefordshire	6%	-4%
Redbridge	14%	-4%
Ealing	10%	-4%

Accommodation

- Overall, 77% of people with learning disabilities are in settled accommodation, with 49% living in settled long term accommodation with family and friends. Of people in unsettled accommodation, the majority (73%) live in residential care. The overall supply of accommodation has increased by 4% since 2014/15, with 1% of that being in the last year.
- Again, there has been little change since 2014/15, with a slight decrease in residential and nursing care.

Settled Accommodation



Settled Accommodation percentage

Settled	Percent	2015/6 Change
City of London	100%	33%
Oldham	97%	5%
St Helens	96%	2%
Tameside	96%	3%
Sefton	96%	9%
Stockport	94%	1%
Liverpool	93%	3%
Salford	93%	0%
Calderdale	93%	1%
North Tyneside	93%	2%
Knowsley	93%	1%
Bracknell Forest	92%	3%
Blackpool	91%	0%
Barking and Dagenham	91%	1%
Trafford	90%	4%
Bury	90%	4%
Hartlepool	90%	4%
North Yorkshire	89%	1%
Bolton	89%	-5%
Bradford	89%	3%

	Percent	2015/6 Change
Isles of Scilly	0%	0%
Bromley	33%	-9%
Telford and the Wrekin	44%	-11%
South Gloucestershire	46%	3%
Croydon	48%	-8%
Plymouth	54%	-6%
Herefordshire	58%	0%
Medway	59%	-2%
Wolverhampton	61%	-5%
West Sussex	62%	5%
Birmingham	62%	8%
Leeds	62%	-3%
Stoke on Trent	64%	-1%
Dudley	65%	5%
Nottingham	66%	-18%
Hampshire	66%	0%
Bournemouth	66%	0%
Northamptonshire	66%	0%
Surrey	66%	4%
Southwark	66%	-4%

Owner Occupation and Shared Ownership

- Overall, owner occupation and shared ownership accounts for 3.0% of settled accommodation, with Shared Lives schemes accounting for 3.4%, both unchanged from 2014/15 and 2015/16. Some authorities perform significantly better:

Owner Occupation and SO	2016-17	2015/16 change
Southampton	20%	-1%
Northamptonshire	14%	1%
Devon	14%	2%
Barnsley	14%	-2%
Haringey	11%	2%
Warrington	10%	-1%
Wigan	8%	1%
Sutton	7%	2%
South Tyneside	7%	1%
Harrow	7%	0%

Shared Lives	2016-17	2015/16 change
Poole	10%	2%
East Sussex	9%	0%
Swindon	9%	-1%
Herefordshire	9%	-2%
Barnsley	8%	0%
Manchester	7%	0%
Torbay	7%	7%
Southampton	7%	-1%
Cornwall	6%	0%
Lancashire	6%	0%

Unsettled – Residential Care

Registered Care	2016/17	2015/16 Change
City of London	0%	-50%
Isles of Scilly	0%	0%
Oldham	1%	0%
Tameside	1%	-1%
Bristol	2%	-1%
Wigan	2%	0%
Blackburn with Darwen	3%	-1%
Bolton	3%	0%
St Helens	3%	0%
Stockport	4%	0%
Salford	4%	0%
Sefton	4%	-8%
Newcastle upon Tyne	5%	0%
Lancashire	6%	0%
Halton	6%	1%
North Tyneside	6%	-3%
Knowsley	6%	0%
Liverpool	7%	-1%
Calderdale	7%	0%
Cheshire West and Chester	7%	-1%

	2016/17	2015/16 Change
Hammersmith and Fulham	32%	-2%
Richmond upon Thames	32%	1%
Birmingham	32%	0%
Nottingham	31%	30%
Lambeth	31%	-2%
Isle of Wight Council	31%	3%
Bexley	30%	0%
Surrey	29%	0%
East Sussex	29%	-2%
Stoke on Trent	29%	2%

Unsettled – Acute Care

Acute	2016/17	2015/16 Change
Warwickshire	7%	7%
South Tyneside	2%	1%
Suffolk	2%	0%
Coventry	1%	1%
Barnet	1%	0%
Bournemouth	1%	1%
Newcastle upon Tyne	1%	0%
Cheshire West and Chester	1%	0%
Trafford	1%	0%
Redcar and Cleveland	1%	0%

Conclusions

- The employment position for people with learning disabilities is continuing a slow reduction as general employment continues to increase. The movements that have taken place appear to be in classification, rather than numbers.
- In accommodation, the shifts between settled and unsettled accommodation – mainly driven by care homes being deregistered into supported housing – masks a very small increase in overall supply (1% over the last 12 months)w.
- The increase in supply does not meet the needs of the growing population, which suggests in particular that young people are being kept in accommodation for longer.

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