

Excerpts from the full set of slides which were used at Cordis Briefing on Thursday 25th April 2019. Full slides are available for subscribers. Please click here to find out more: <https://www.cordisbright.co.uk/briefing.php>

Cordis Briefing

April 2019

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Today's Briefing

- Introduction
- Viewfinder Part 1
- Profiling the Not for Profit Sector
- Monitoring the Mental Health Act

BREAK

- Viewfinder Part 2
- Profiling Mental Health Foundation Trusts
- NHS Long Term Plan 2
- Viewfinder Part 3

Cordis Viewfinder 2019: Workforce





Workforce

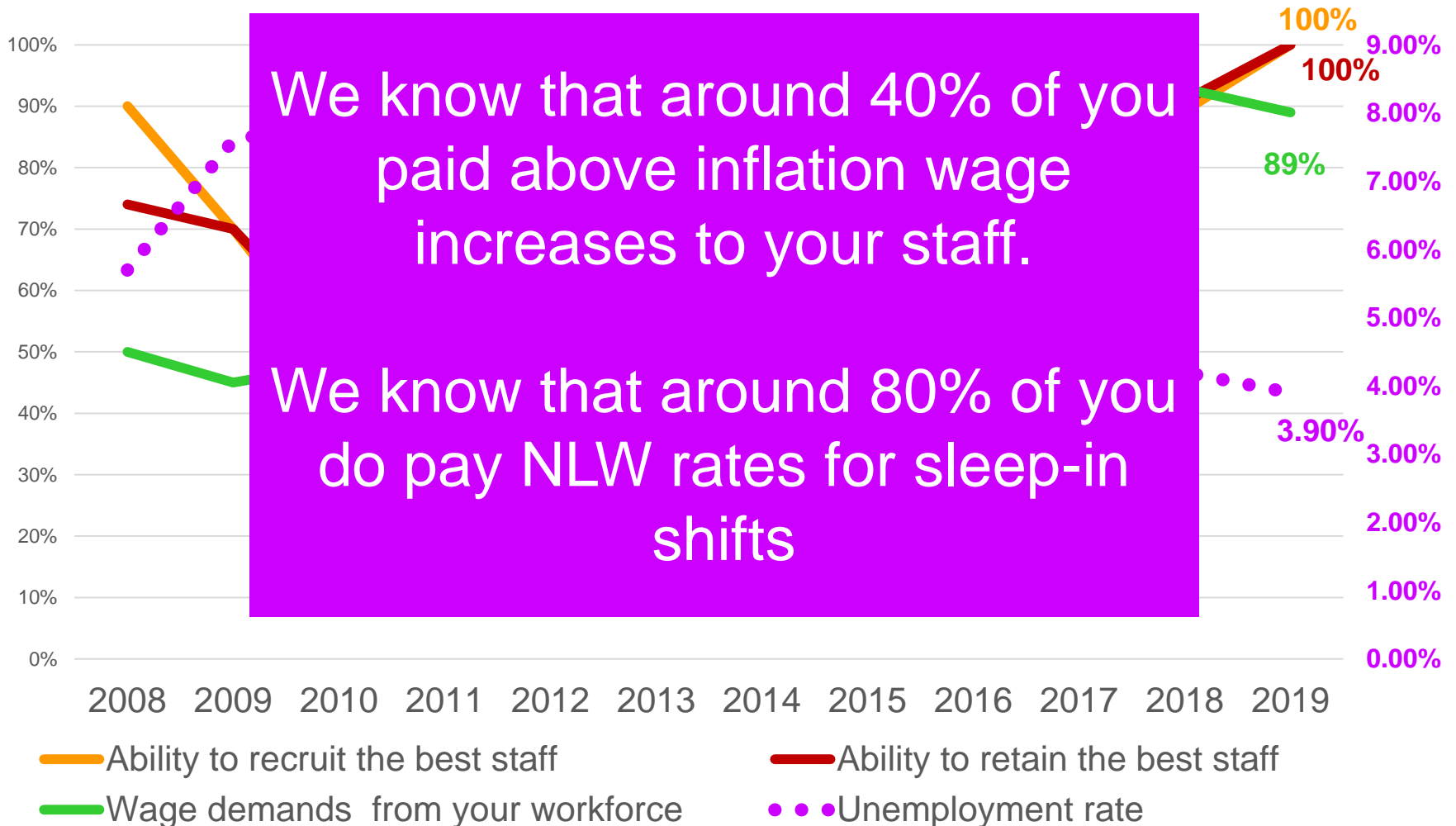
- We thought there was a value in trying to look at your responses to issues around workforce across all parts of the survey
- We also asked you a couple of additional questions in relation to this area.

Workforce the key challenges

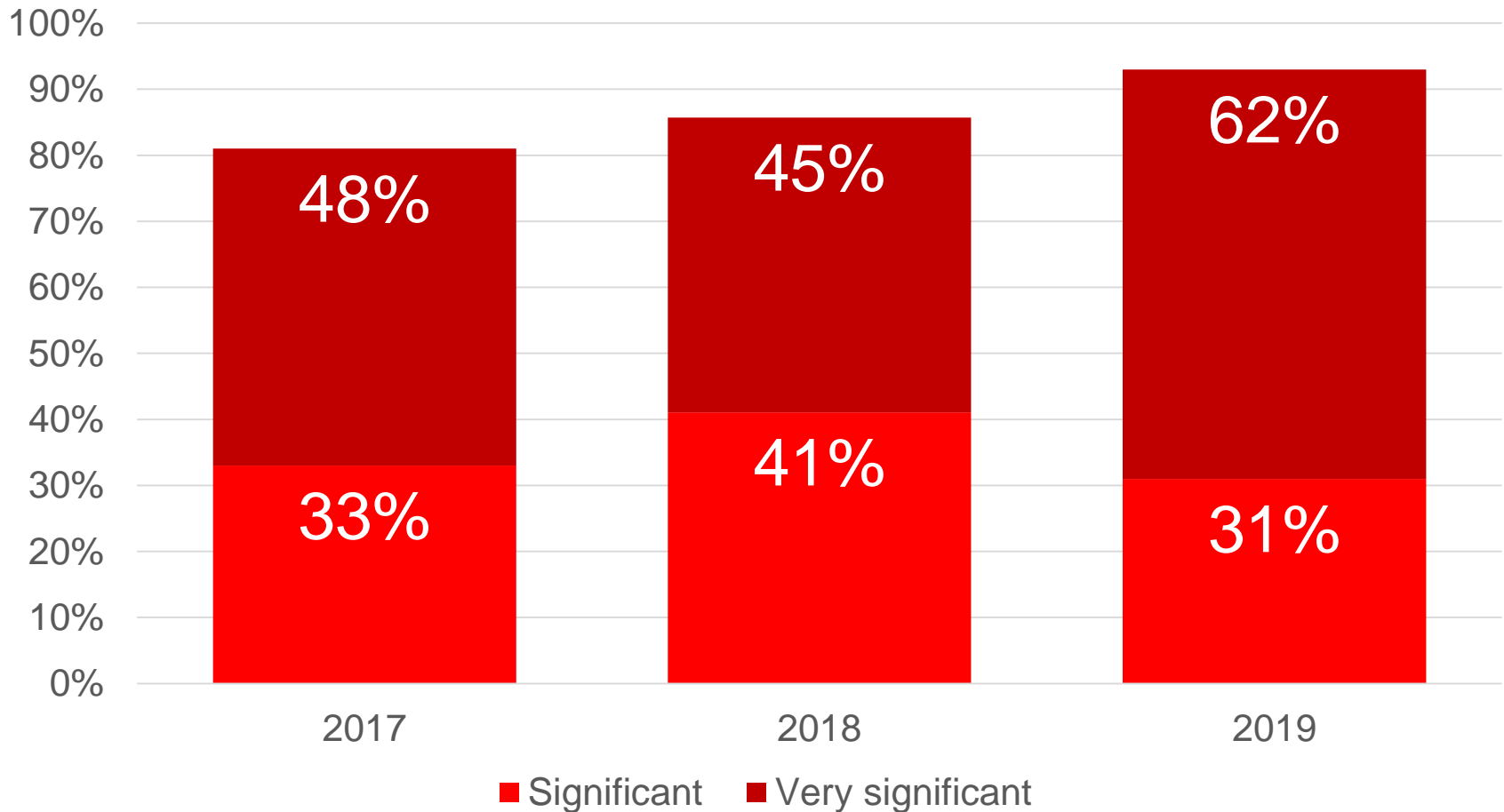




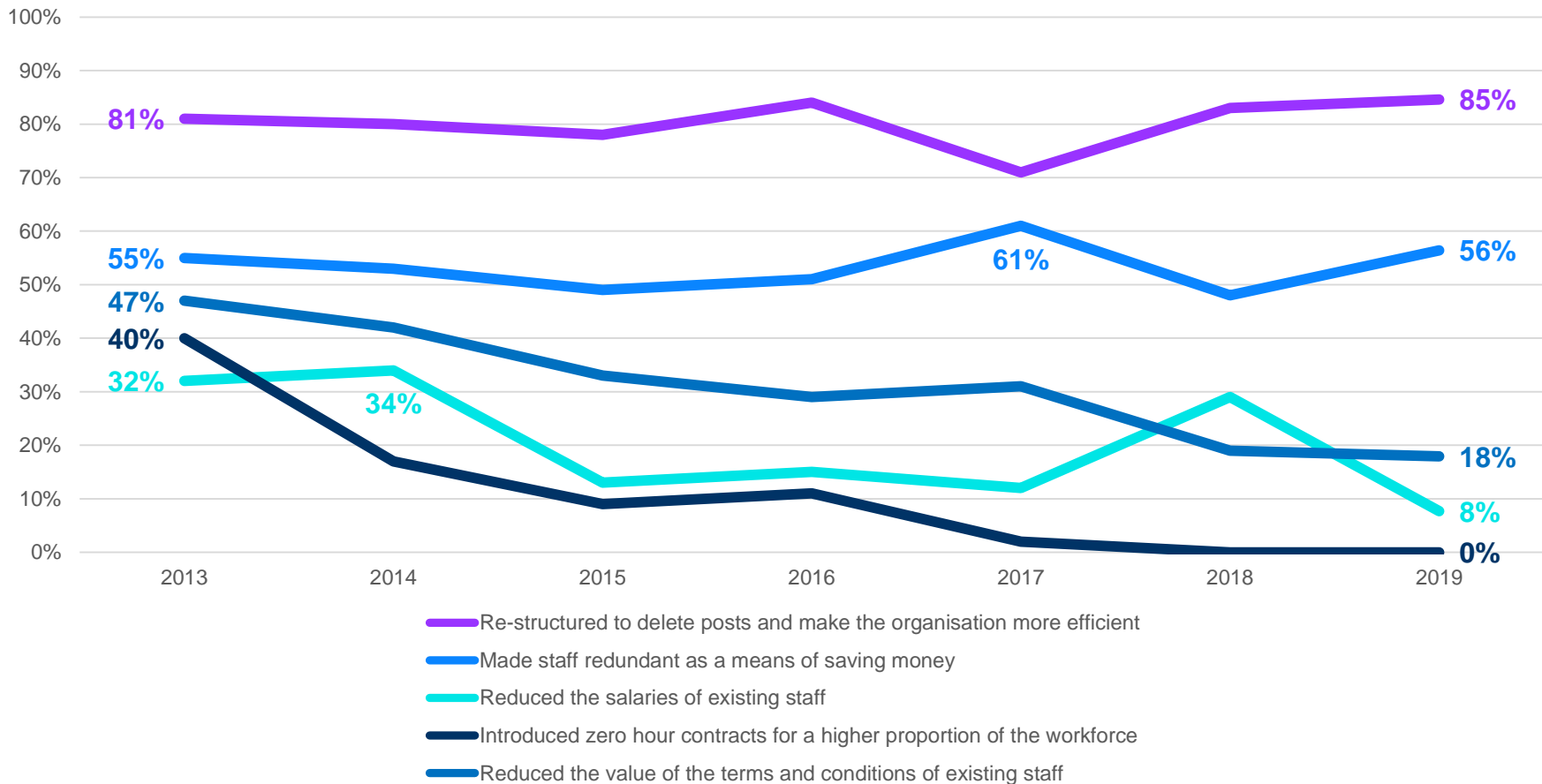
Workforce the key challenges



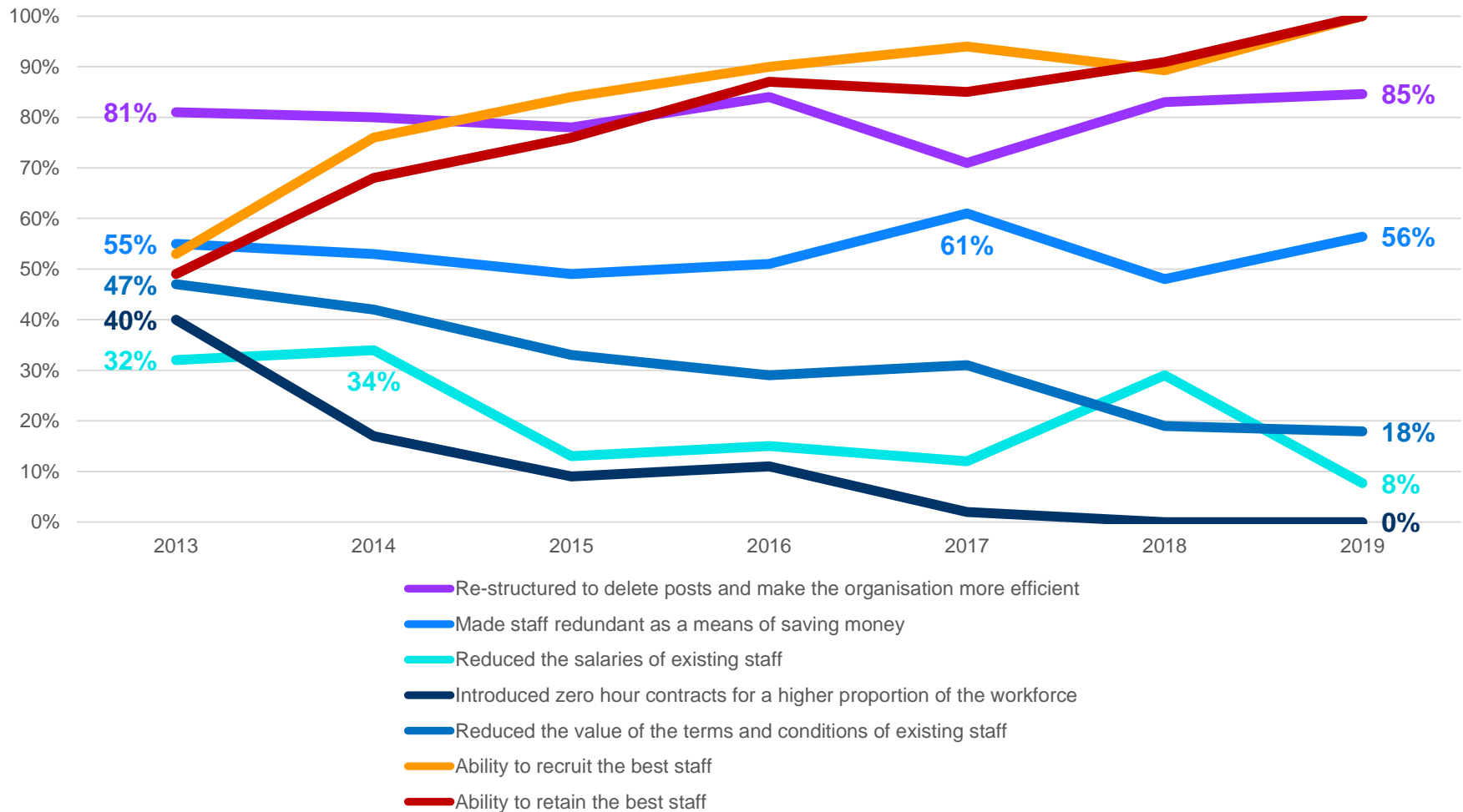
Workforce: Threat of increases in NLW



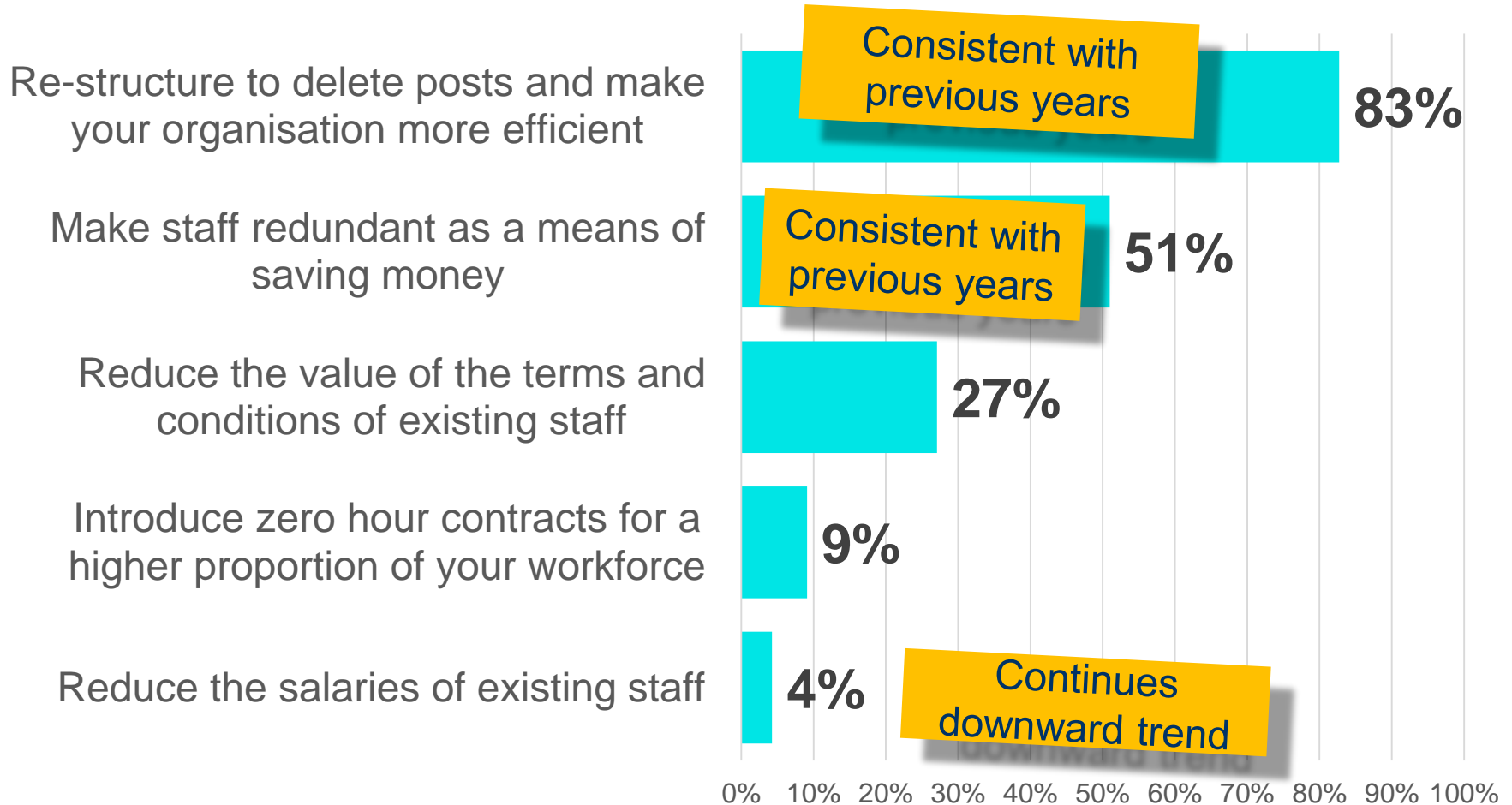
Workforce – how you have saved money



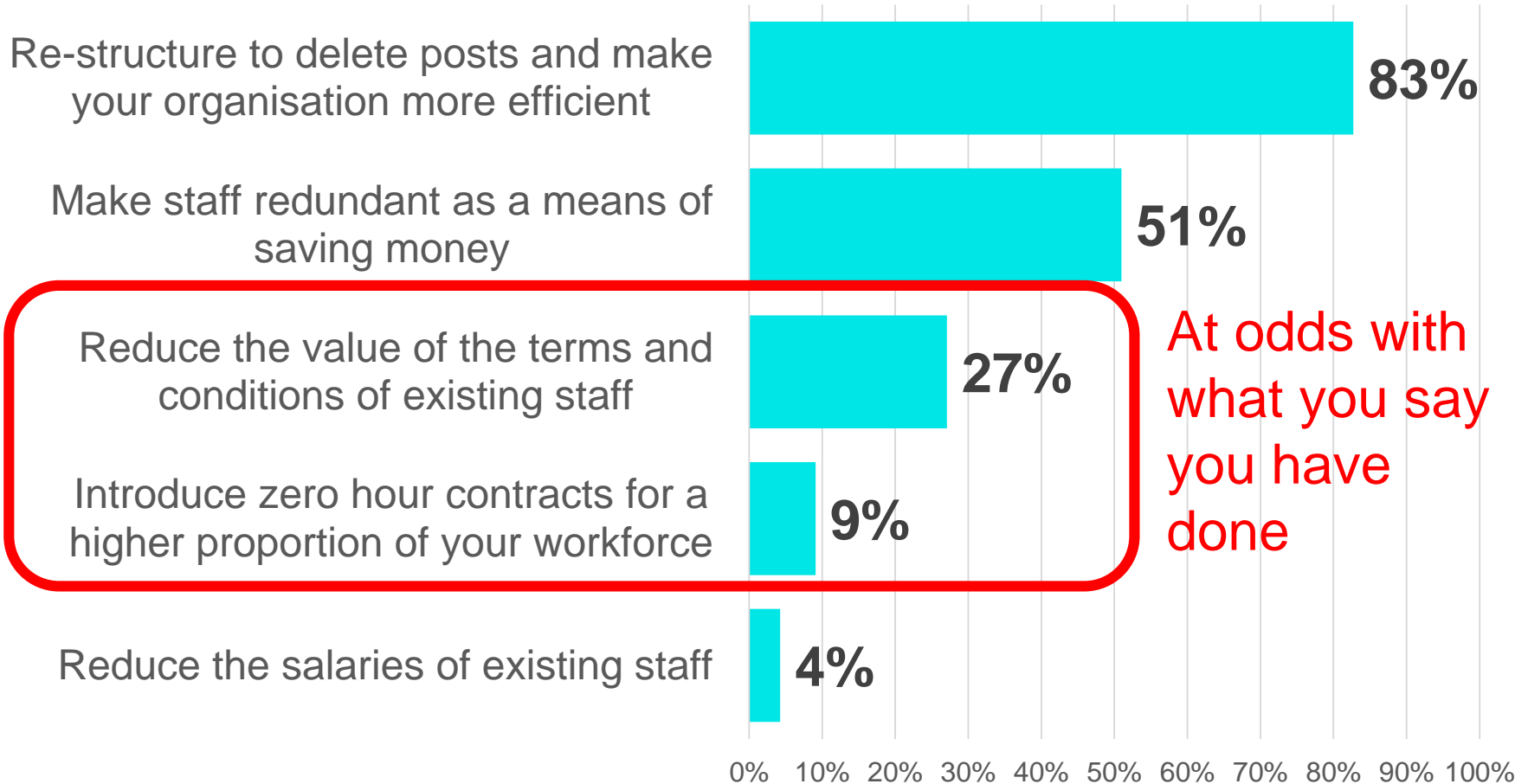
Workforce – how you have saved money



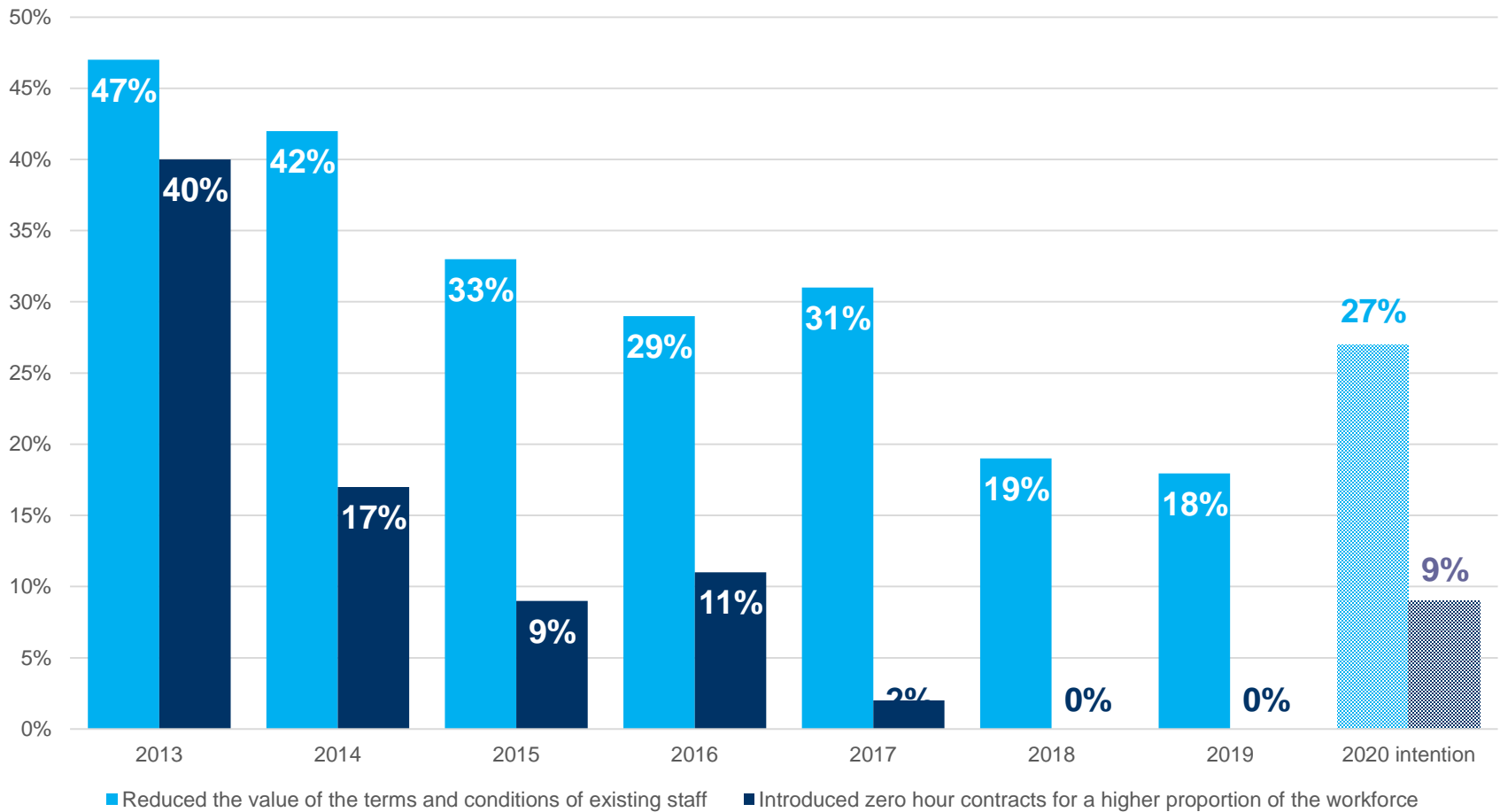
Workforce – your plans for the future



Workforce – your plans for the future



Workforce – your plans for the future



Profiling the not-for-profit sector



Research approach

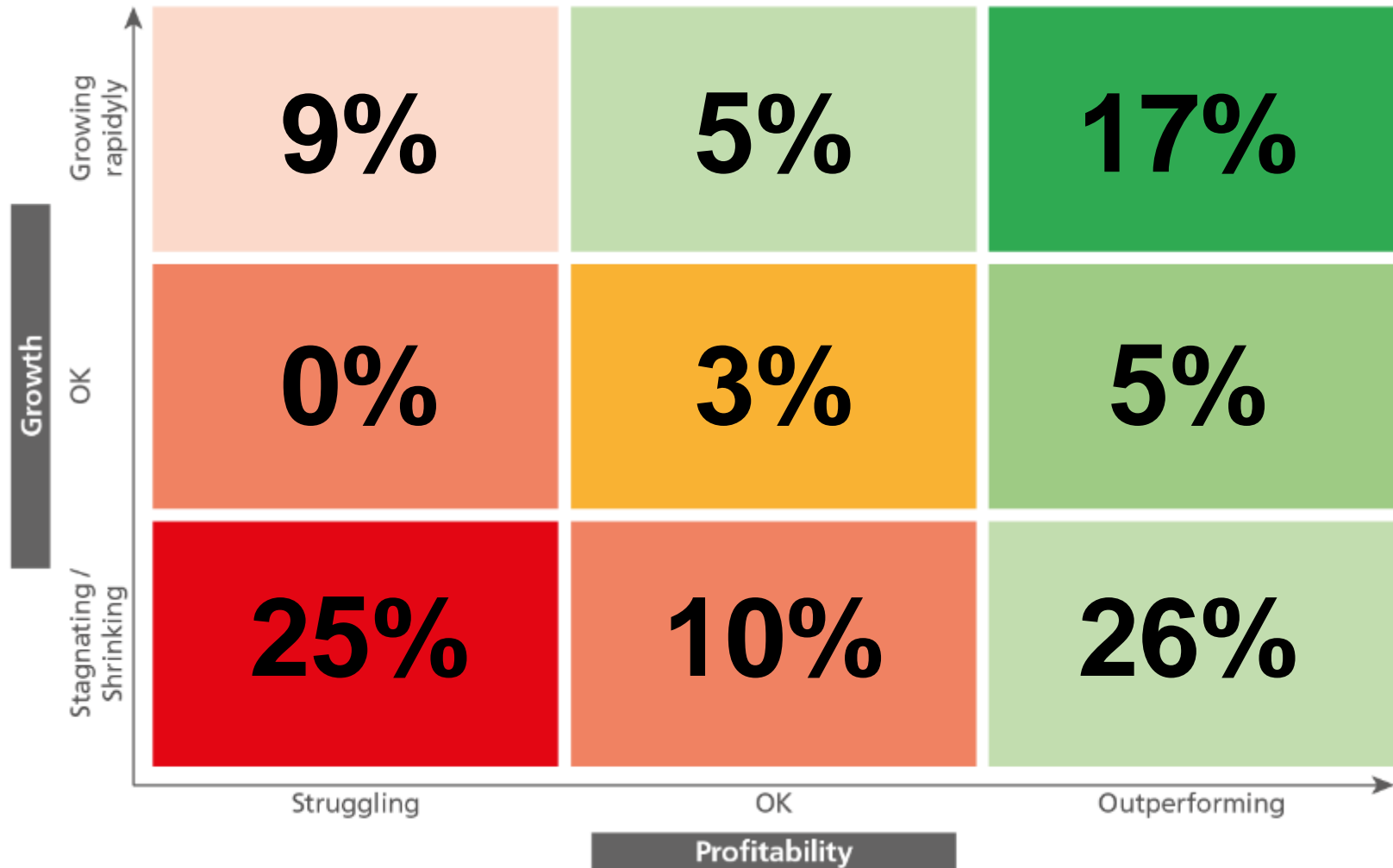
- Longitudinal analysis, starting in 2012
- Exploring profitability and growth
- Based on year end results submitted to charity commission
- In 2018 - looked at 117 charities delivering adult social care
- Categorised them (as far as possible) by main client group
- A combined turnover of more than £2.7bn in 2018, including:
 - 18 charities with a turnover of £35m+
 - 48 charities with a turnover of £10-35m
 - 21 charities with a turnover of £5-10m
 - 27 charities with a turnover of £1-5m
 - 3 charities with a turnover of <£1m

Boundaries

Category	Definition
<i>Profit</i>	
Struggling	<1%
Doing OK	1-3%
Outperforming	>3%
<i>Growth</i>	
Shrinking	Anything less than inflation for that year.
Doing OK	Inflation to 5%
Growing rapidly	>5%

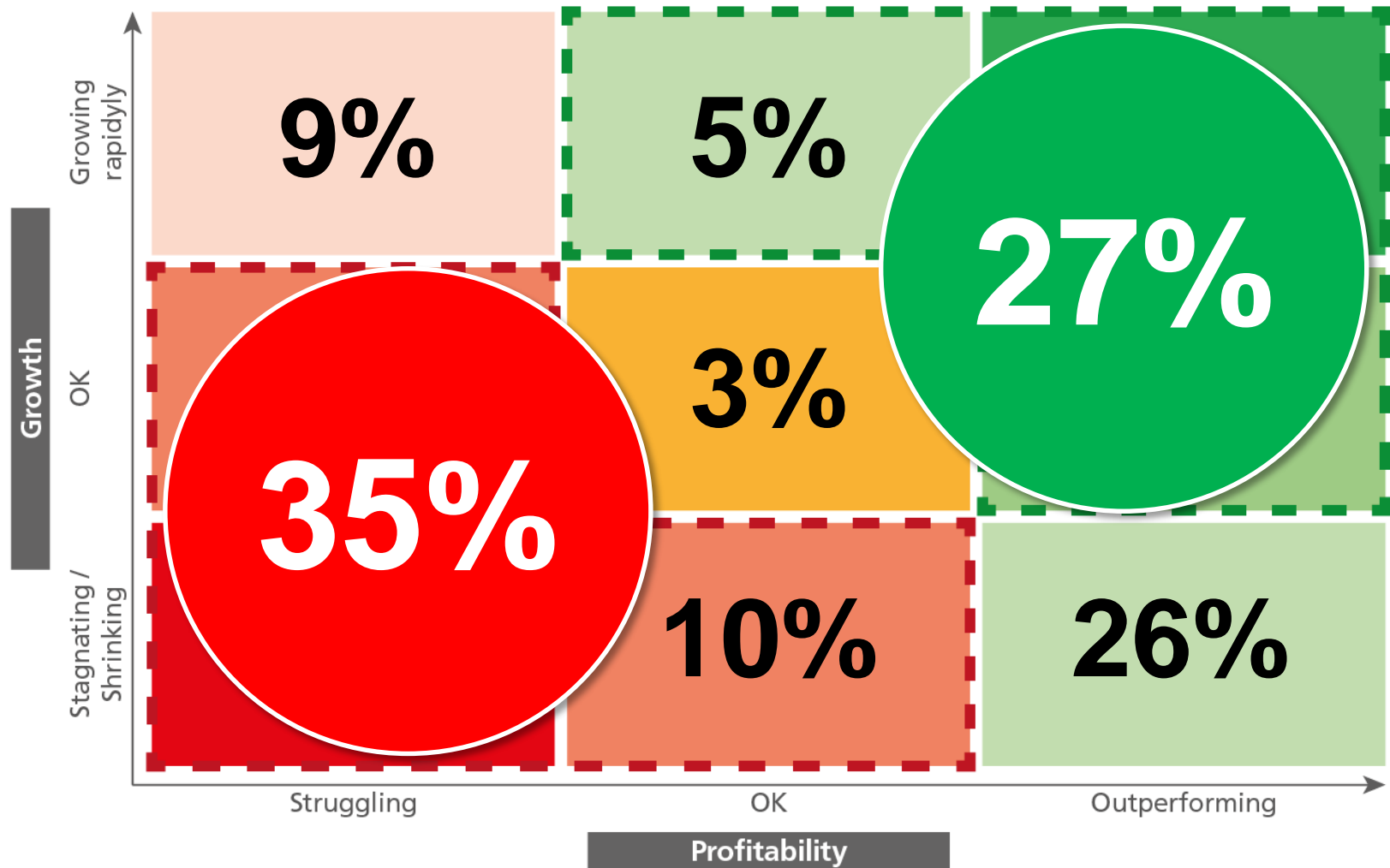
All providers (119)

Growth and profitability: 2012 snapshot



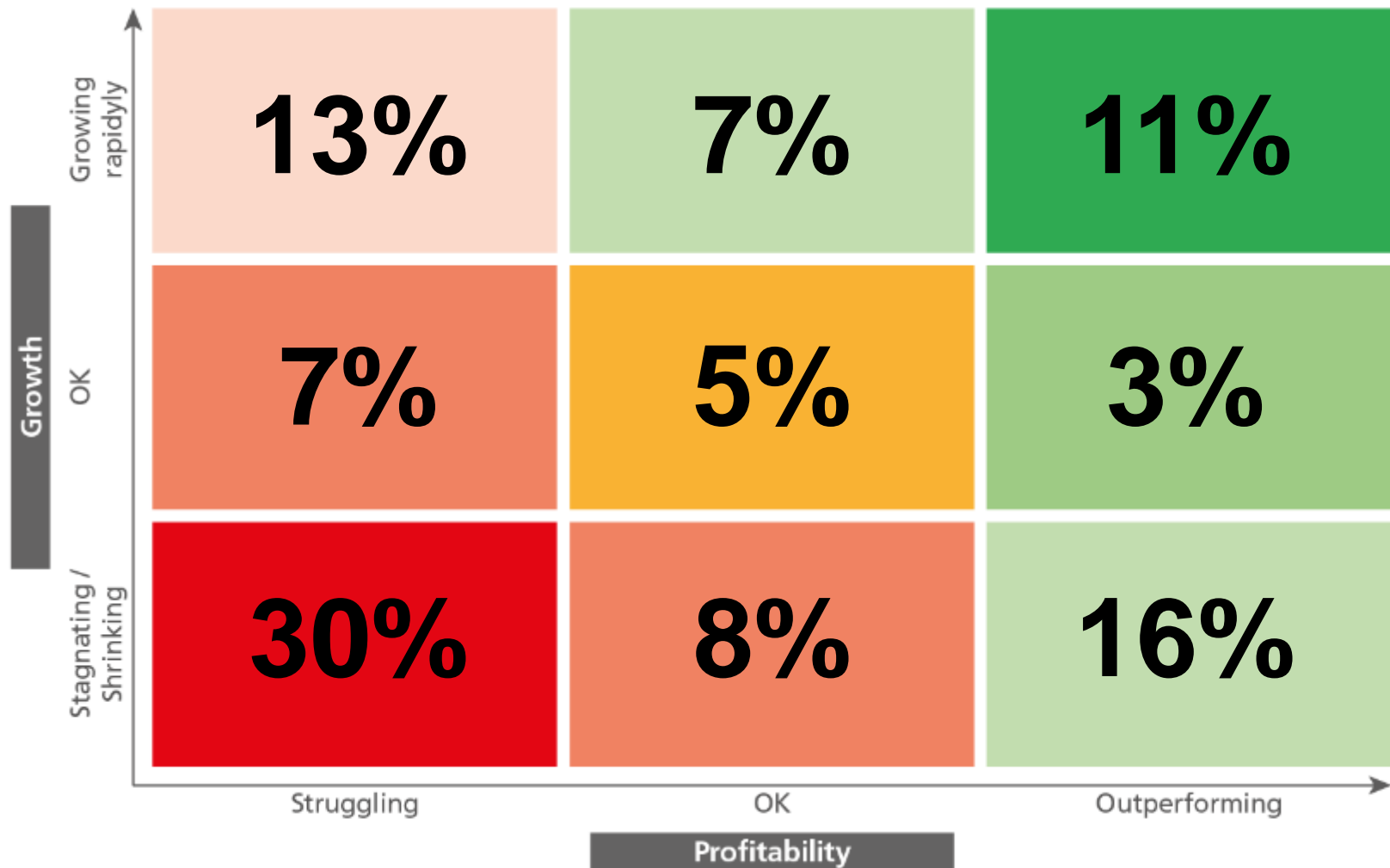
All providers (119)

Growth and profitability: 2012 snapshot



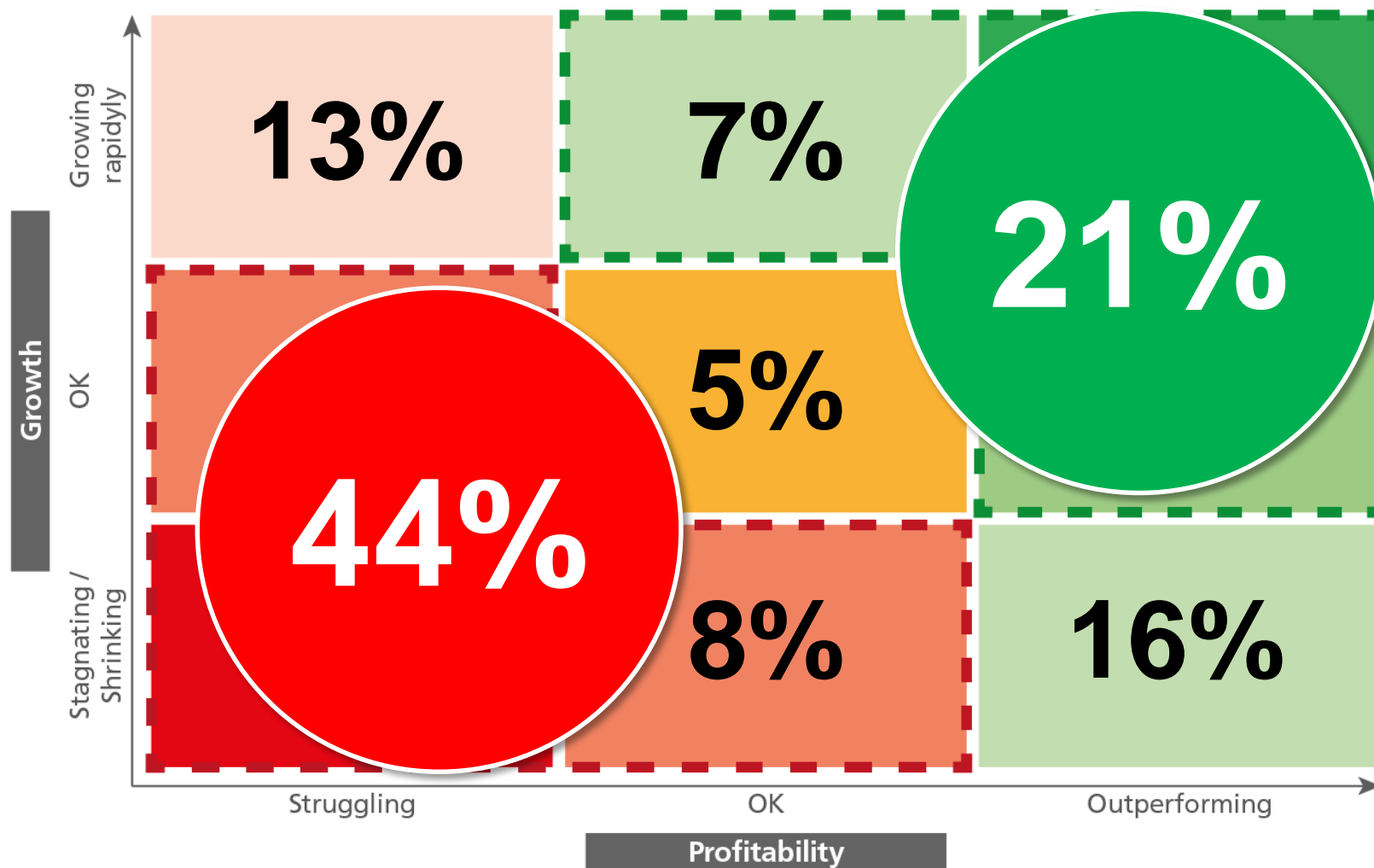
All providers (117)

Growth and profitability: 2018 snapshot



All providers (117)

Growth and profitability: 2018 snapshot





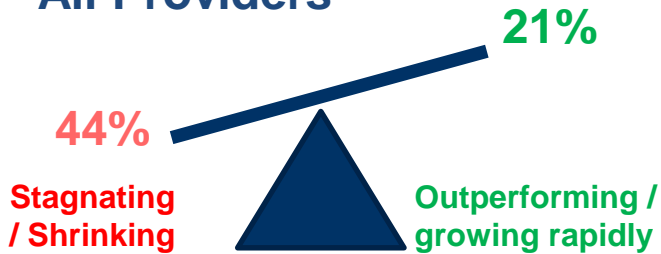
2012 – 2018: What's changed?

- Still a story of slow negative financial pressure on the sector
- The red zone has grown from 35% to 44%
- The green zone has dropped from 27% to 21%

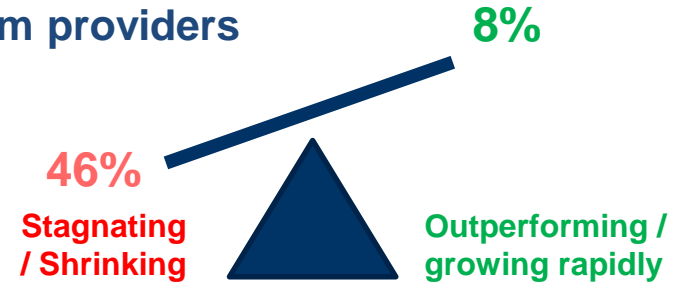


2018 Profit and Growth Summary

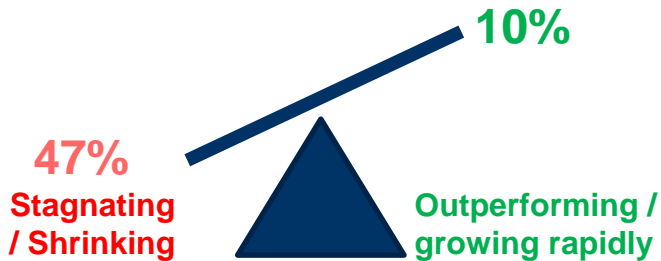
All Providers



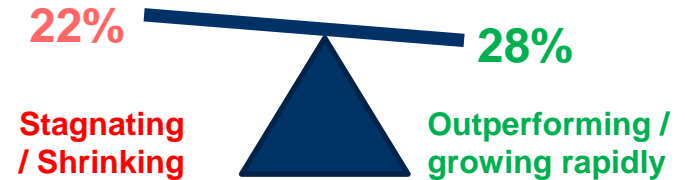
Autism providers



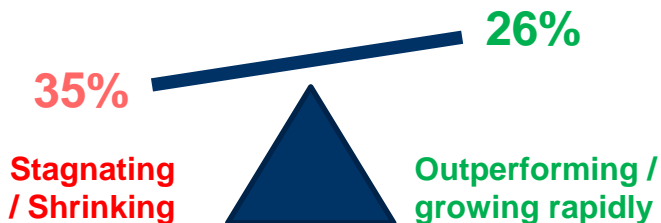
Smaller providers



Older People providers



Learning Disability providers



MH SM Homelessness Providers



Conclusions

- A continued tale of decline
- Learning disability and older people's providers are weathering the storm better than most
- Smaller providers, autism providers and those working in substance misuse, homelessness and mental health appear to be taking most of the hits
- Rough Sleeper Initiative and investment in mental health should change the fortunes of the MH / SM / Homelessness category next year
- Will be interesting to see if it does
- Growth appears especially problematic in this last 12 months
- Likely to see profitability worsen as a result next year?
- A very difficult cycle for these organisations to break
- Wonder if the next 12 months will see some changes in the market



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