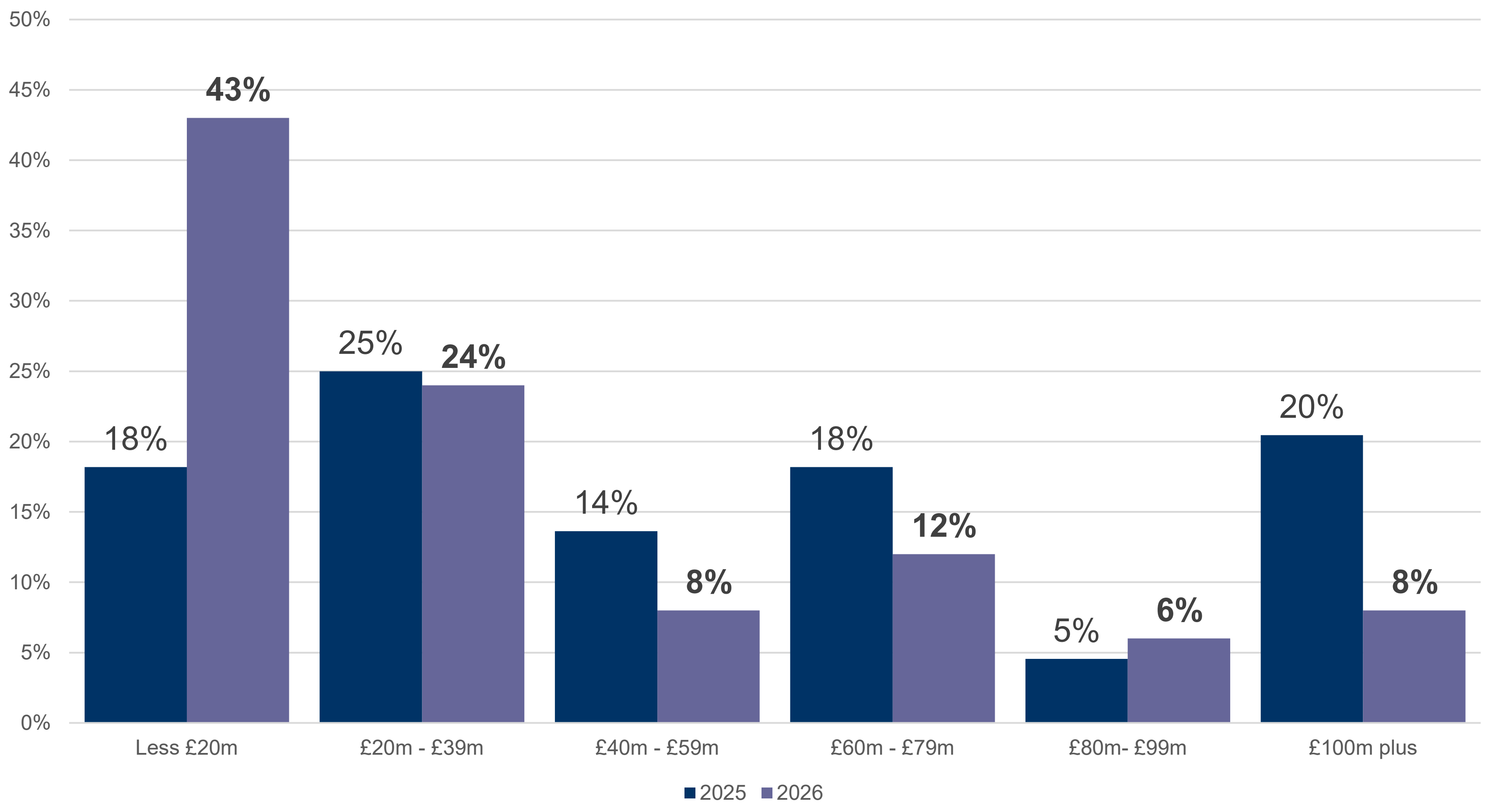
Cordis Bright & VODG Viewfinder 2026

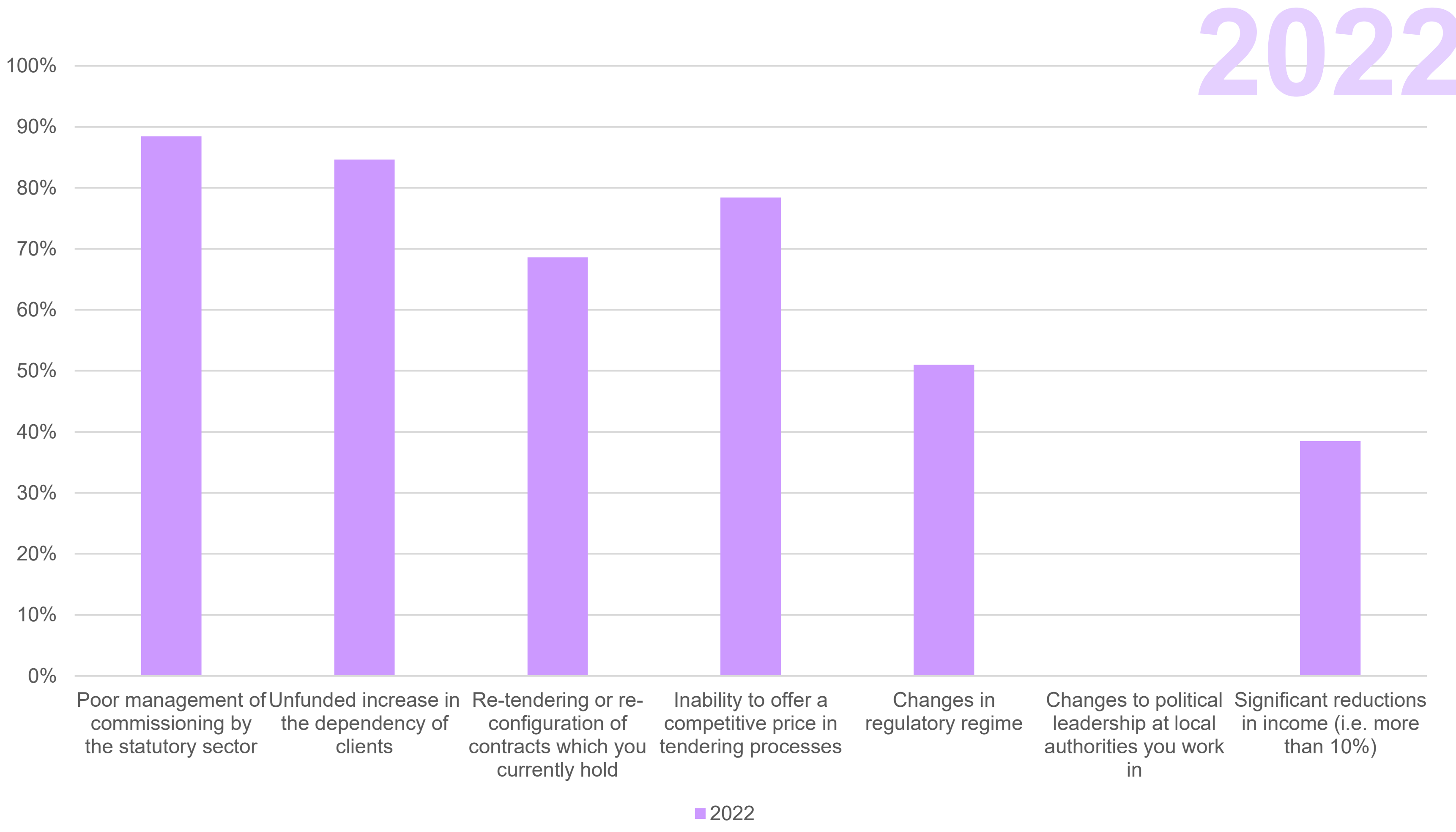
Cordis Bright & VODG Viewfinder 2026

- 60 responses
- Combined turnover of just over £2.7billion
- For the first time, we've worked in in collaboration with VODG to develop and distribute the survey.

Cordis Viewfinder 2025



Concerns for the coming year



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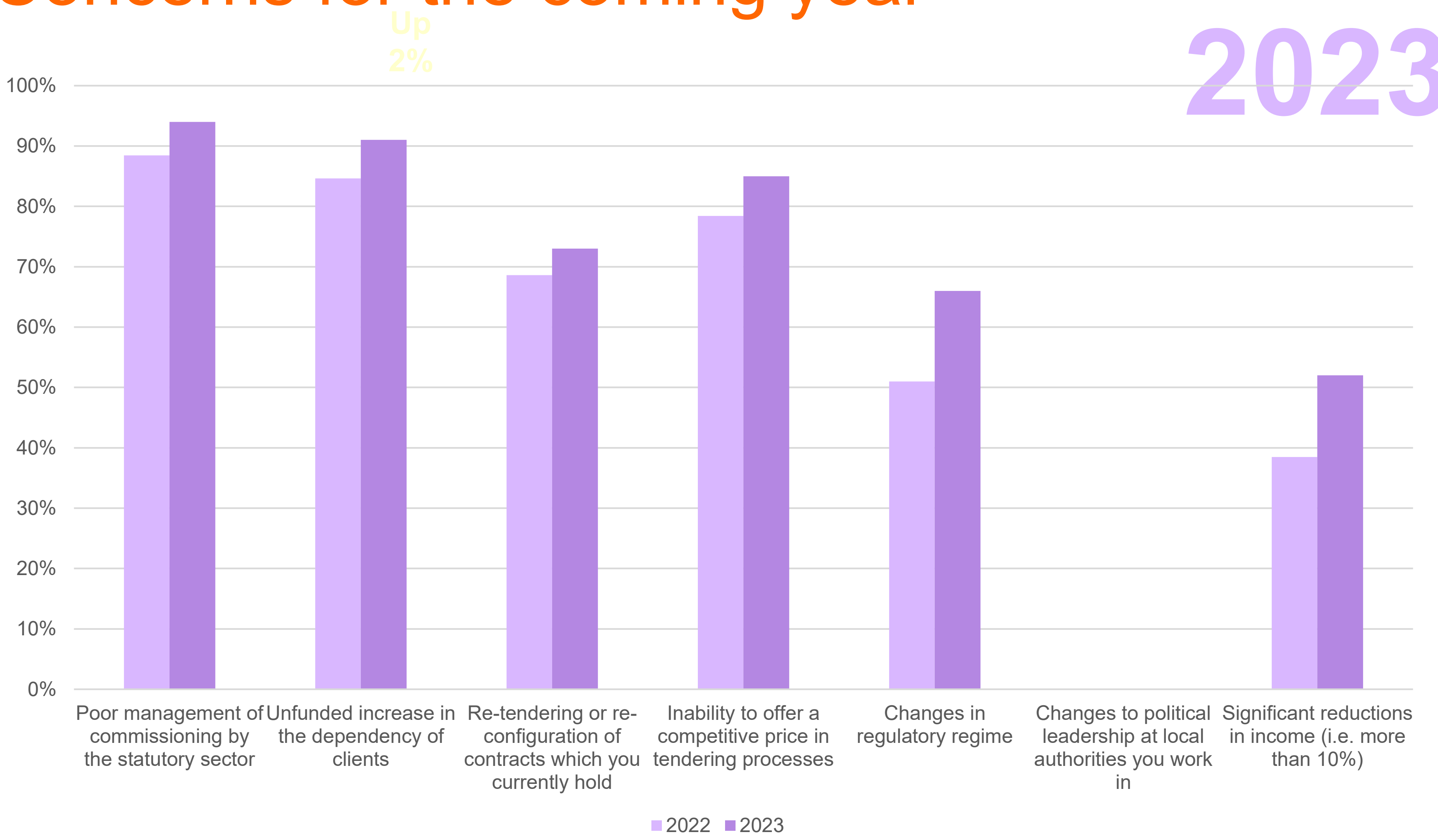
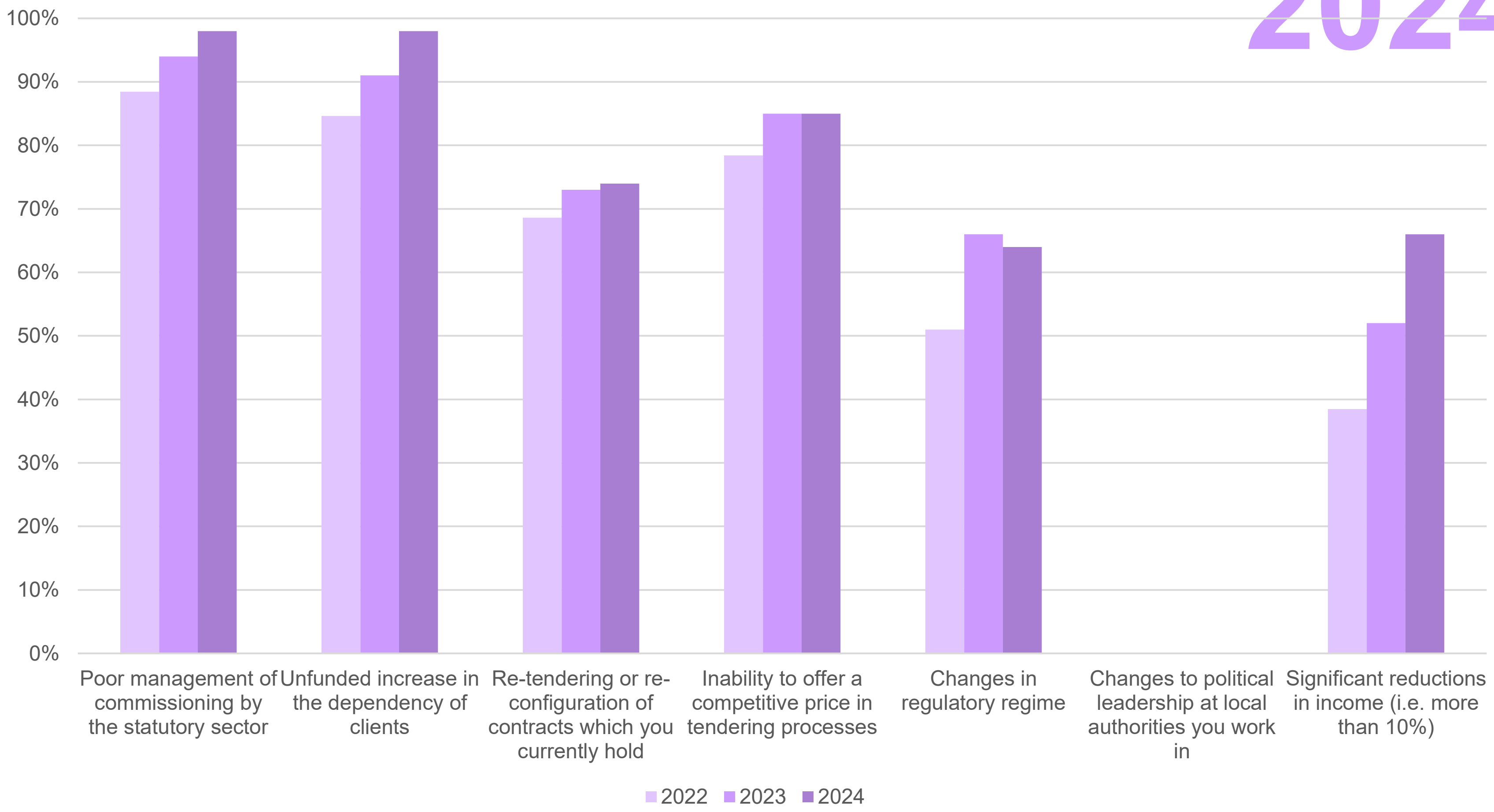


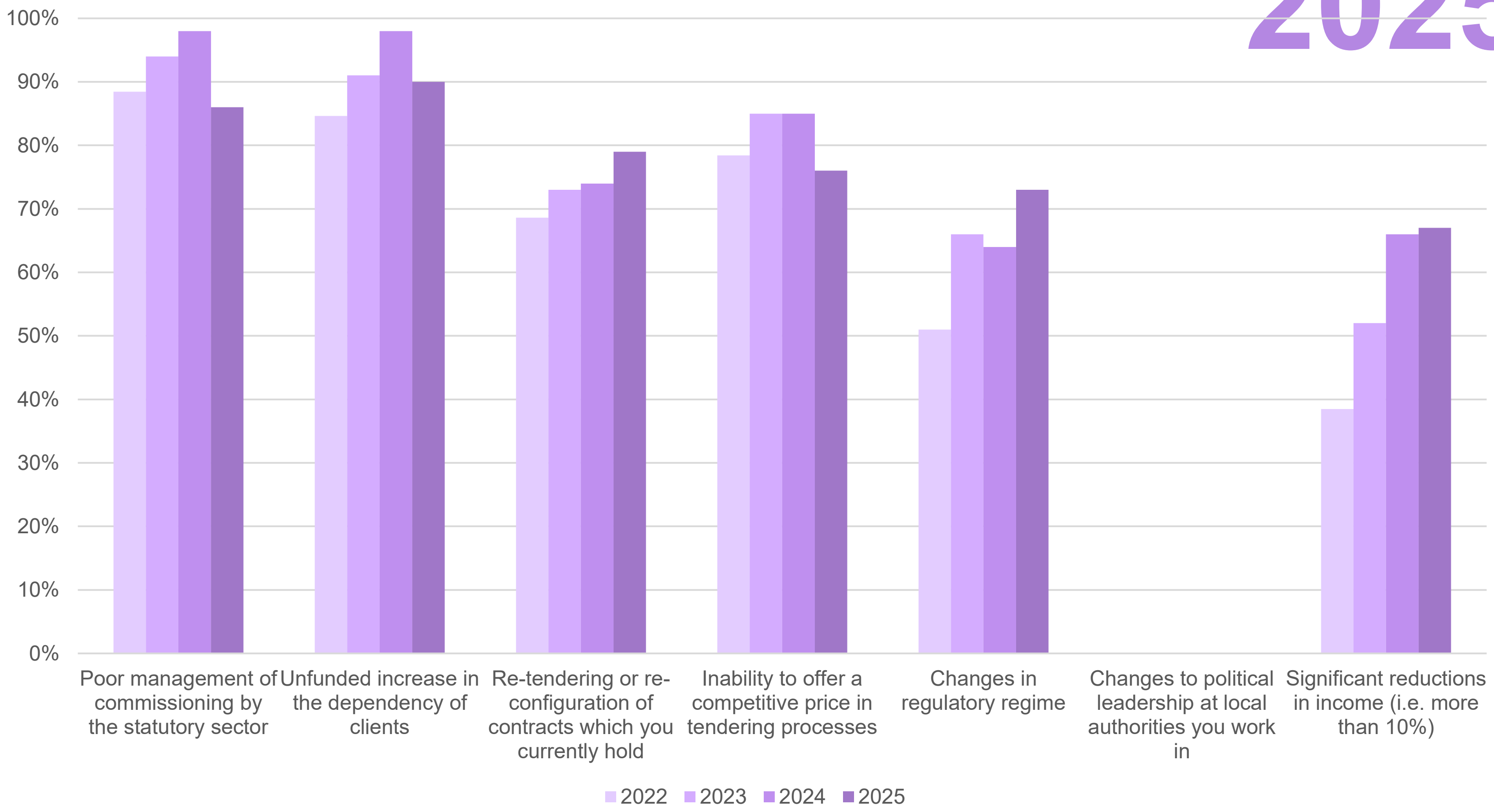
Concerns for the coming year

2024

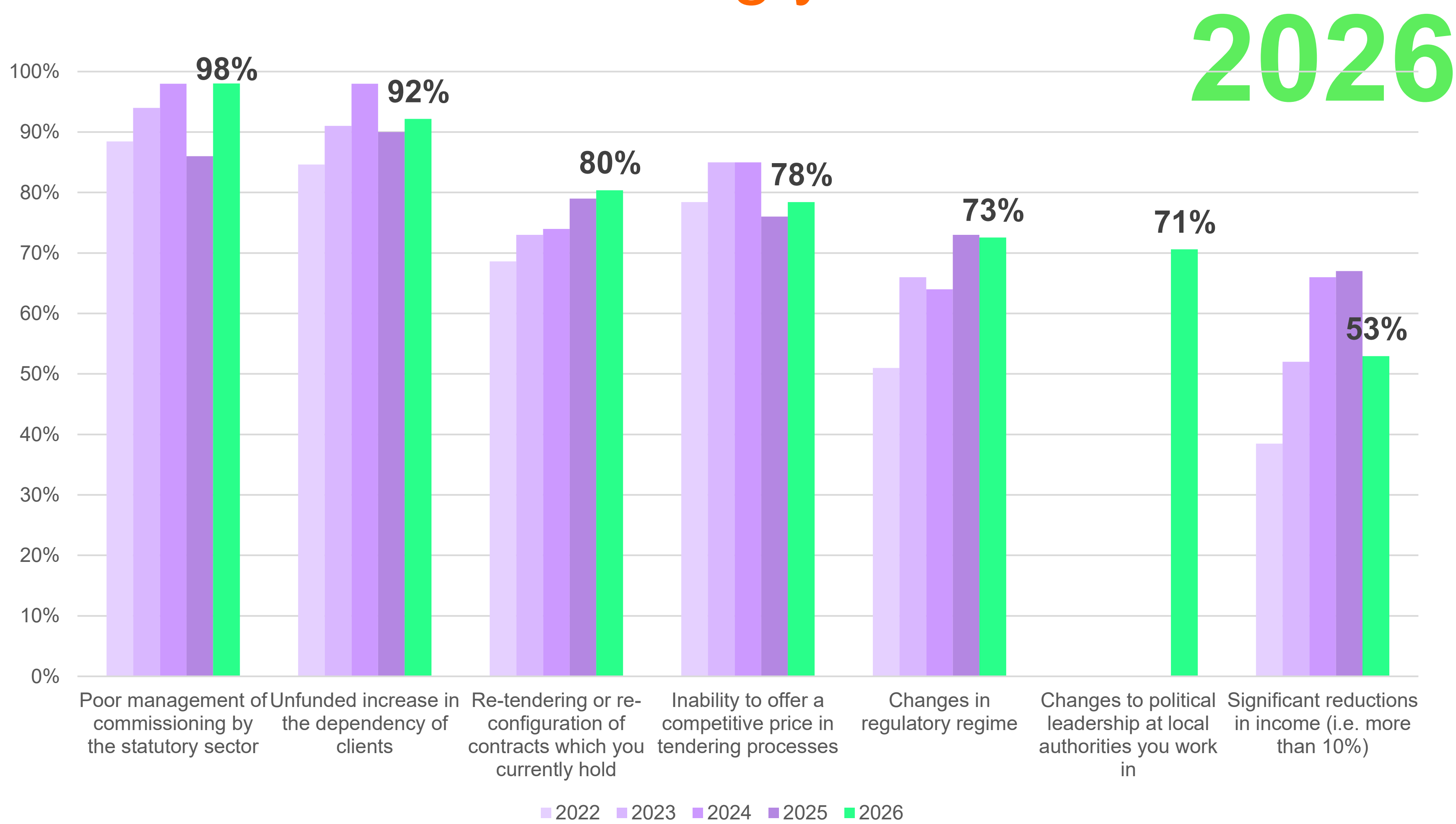


Concerns for the coming year

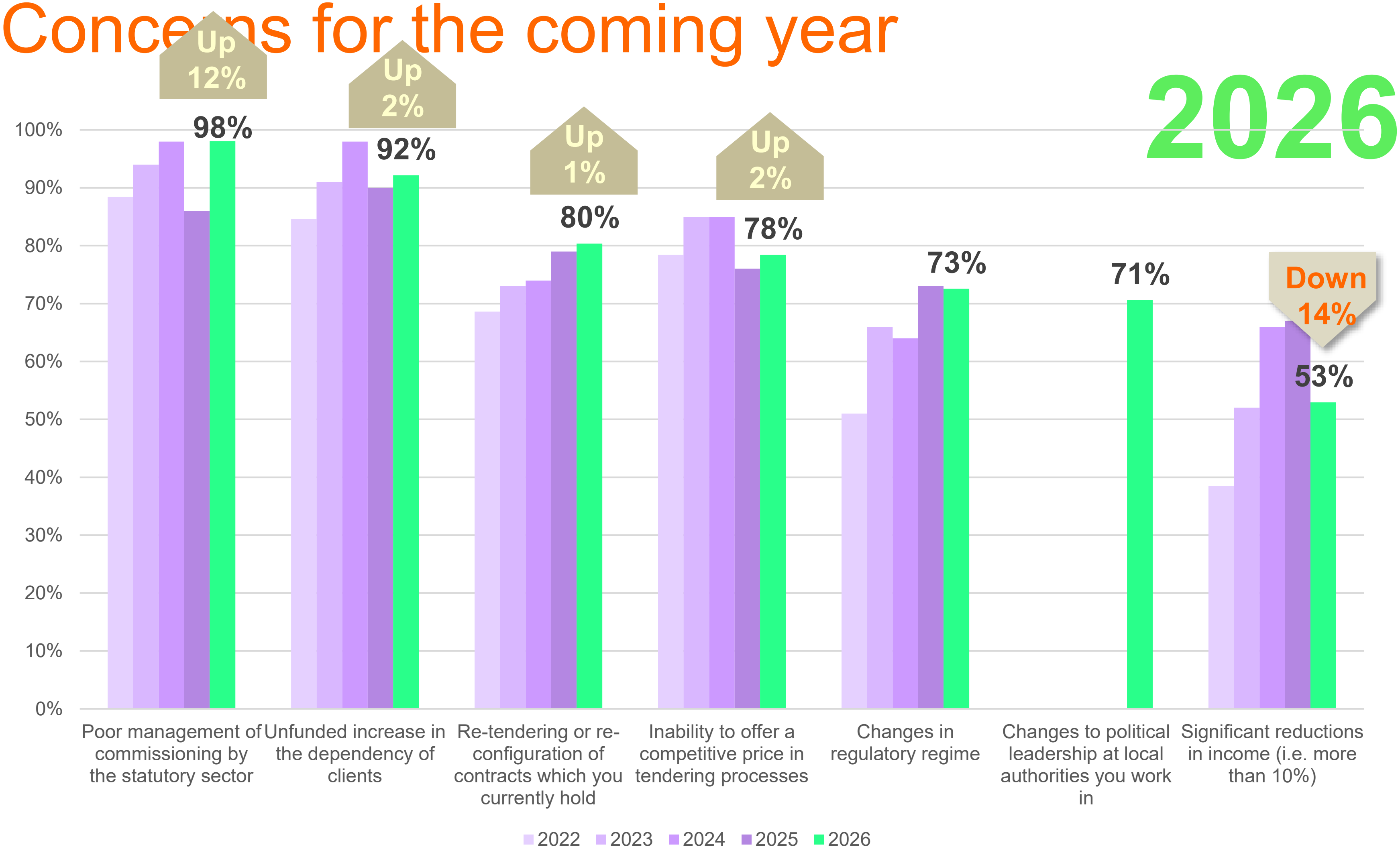
2025



Concerns for the coming year



Concerns for the coming year



Concerns for the coming year

- Mostly heading up albeit slowly
- New entry is change in political leadership which is already causing significant concern.
- You are slightly less concerned about overall income reduction

What you thought you would do last year

	What you thought you would do	What you did	What you might do next
Exit contracts which are not providing sufficient margin			
Close down services which operate at a deficit			
Reduce the level of service provided whilst maintaining the same price			
Make a deficit equivalent to at least 5% of income			
Plan to spend of at least 10% of reserves to support under-funded services			
None of the above			

What you thought you would do last year

	What you thought you would do	What you did	What you might do next
Exit contracts which are not providing sufficient margin	93%		
Close down services which operate at a deficit	80%		
Reduce the level of service provided whilst maintaining the same price	60%		
Make a deficit equivalent to at least 5% of income	36%		
Plan to spend of at least 10% of reserves to support under-funded services	30%		
None of the above	10%		

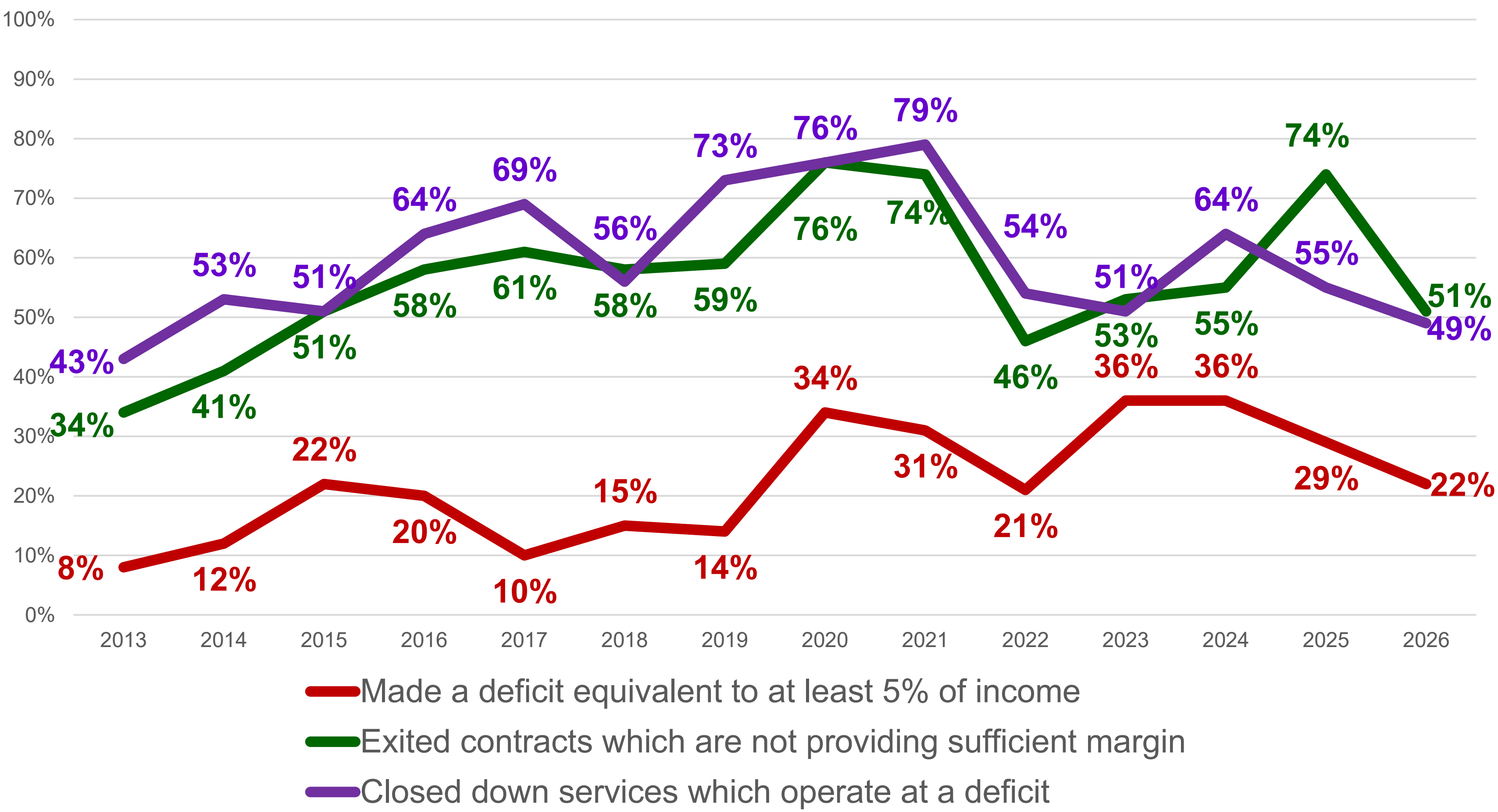
What you thought you would do last year

	What you thought you would do	What you did	What you might do next
Exit contracts which are not providing sufficient margin	93%	51%	
Close down services which operate at a deficit	80%	49%	
Reduce the level of service provided whilst maintaining the same price	60%	31%	
Make a deficit equivalent to at least 5% of income	36%	22%	
Plan to spend of at least 10% of reserves to support under-funded services	30%	6%	
None of the above	10%	18%	

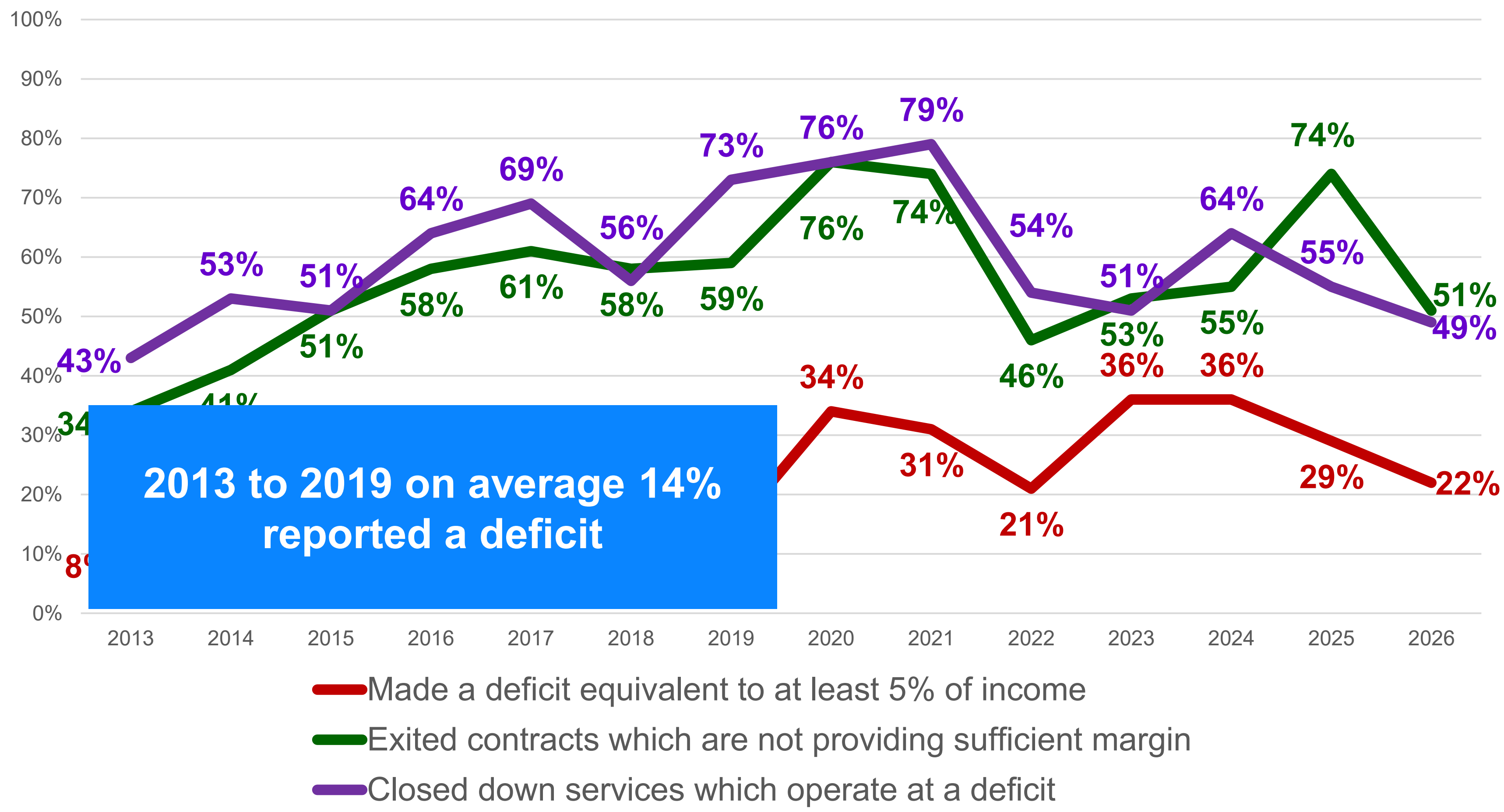
What you thought you would do last year

	What you thought you would do	What you did	What you might do next
Exit contracts which are not providing sufficient margin	93%	51%	75%
Close down services which operate at a deficit	80%	49%	71%
Reduce the level of service provided whilst maintaining the same price	60%	31%	48%
Make a deficit equivalent to at least 5% of income	36%	22%	22%
Plan to spend of at least 10% of reserves to support under-funded services	30%	6%	15%
None of the above	10%	18%	

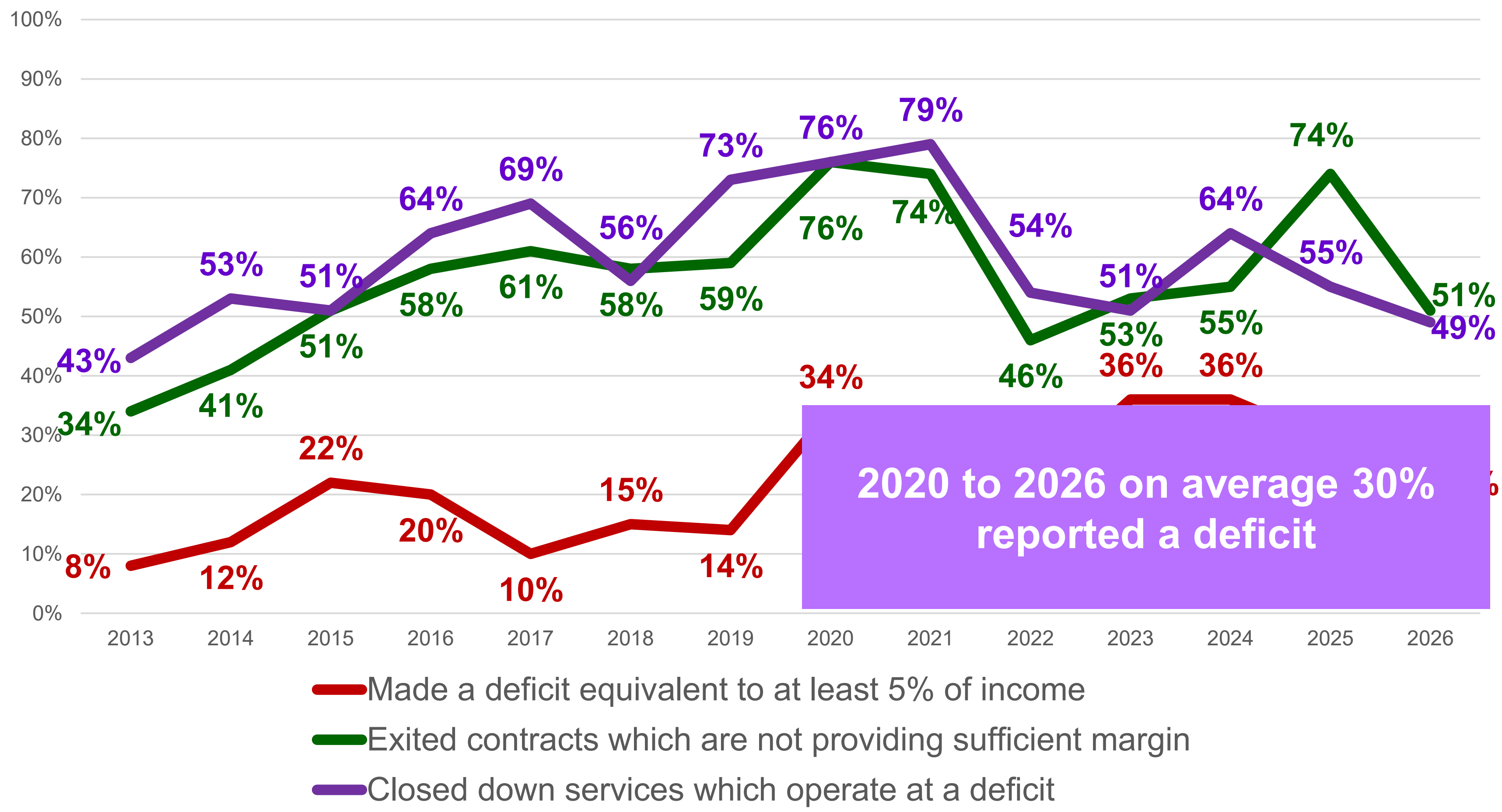
Deficit tolerance?



Deficit tolerance?



Deficit tolerance?



Drivers for action

- Chronic underfunding – baked in, non-negotiable, a fact of life

Drivers for action

• Chronic

"Commissioned care fees not reflecting cost of provision"

"We continually have to serve notice on underfunded packages…"

"Lack of adequate inflationary uplifts from statutory commissioners"

Drivers for action

- Chronic underfunding – baked in, non-negotiable, a fact of life
- Workforce cost pressure – direct via increases in NLW but also the tax increases on you as employers through higher rates of ENIC

Drivers for action

- Chronic
- Workforc ... the tax increase

"Insufficient funding to cover London Living Wage increases"

"Increase of NIC… against the backdrop of no uplifts"

"Unable to attract & retain skilled staff"

Drivers for action

- Chronic underfunding – baked in, non-negotiable, a fact of life
- Workforce cost pressure – direct via increases in NLW but also the tax increases on you as employers through higher rates of ENIC
- Instability and uncertainty about the future

Drivers for action

- Chro
- Work … e tax incre
- Insta

"Perfect storm of central government policy and lack of local government finances"

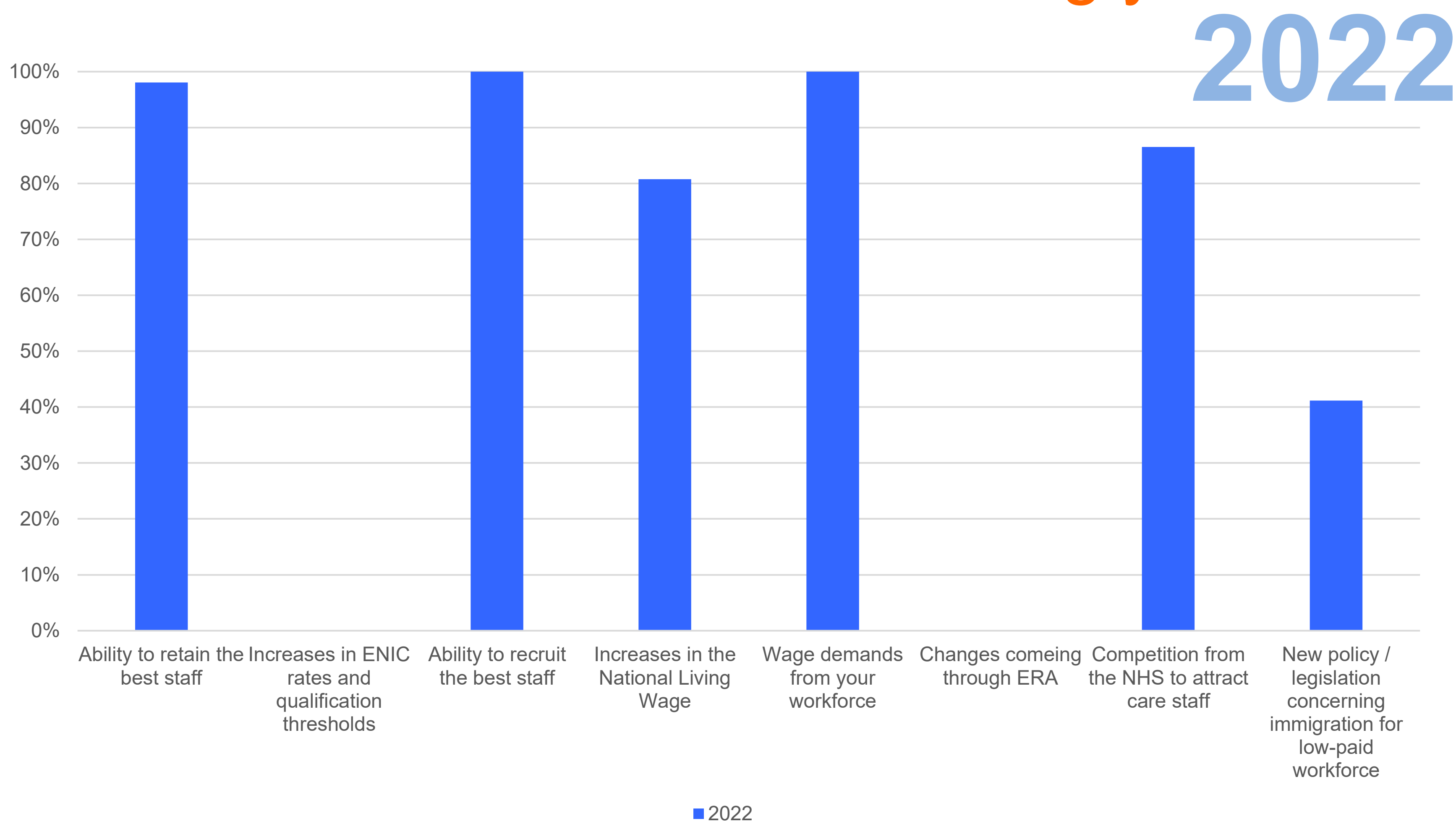
"Changing regulatory regimes across Ofsted and CQC"

"Impact of government policy… negatively impacting our county council"

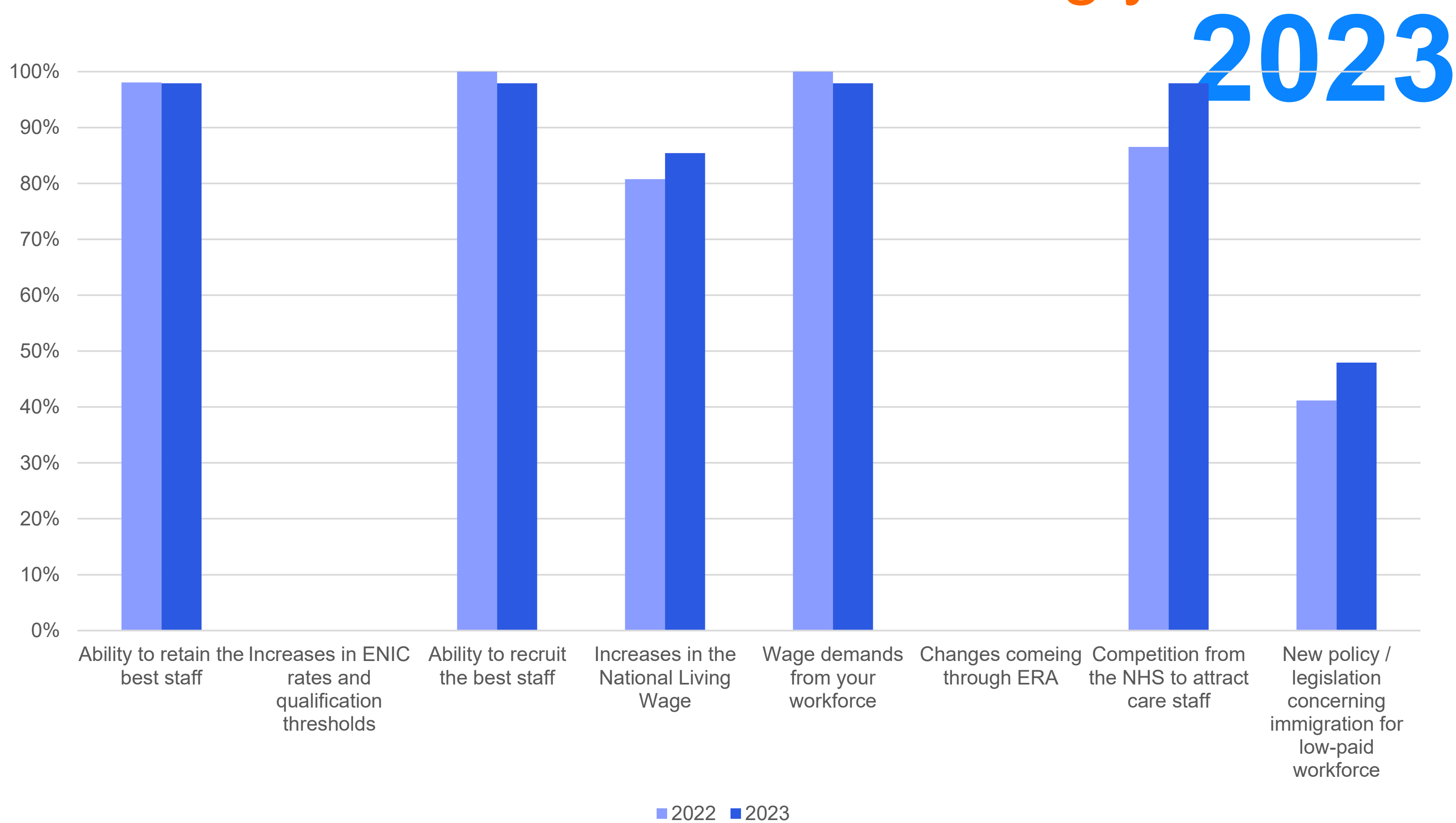
Accelerators for action

- Compounding and intersecting pressure on sustainability – never just the one thing
  - Void risks
  - Unsuitable or impractical estates
  - Pressure on reserves but more critically liquidity
  - Cross subsidy becoming increasing unstainable
- Most of the action can be characterised as defensive – constantly on the back foot
- Big picture also impacts strongly, cost of living pressures directly on organisations but increasingly untenable to low paid staff.

Workforce concerns for the coming year

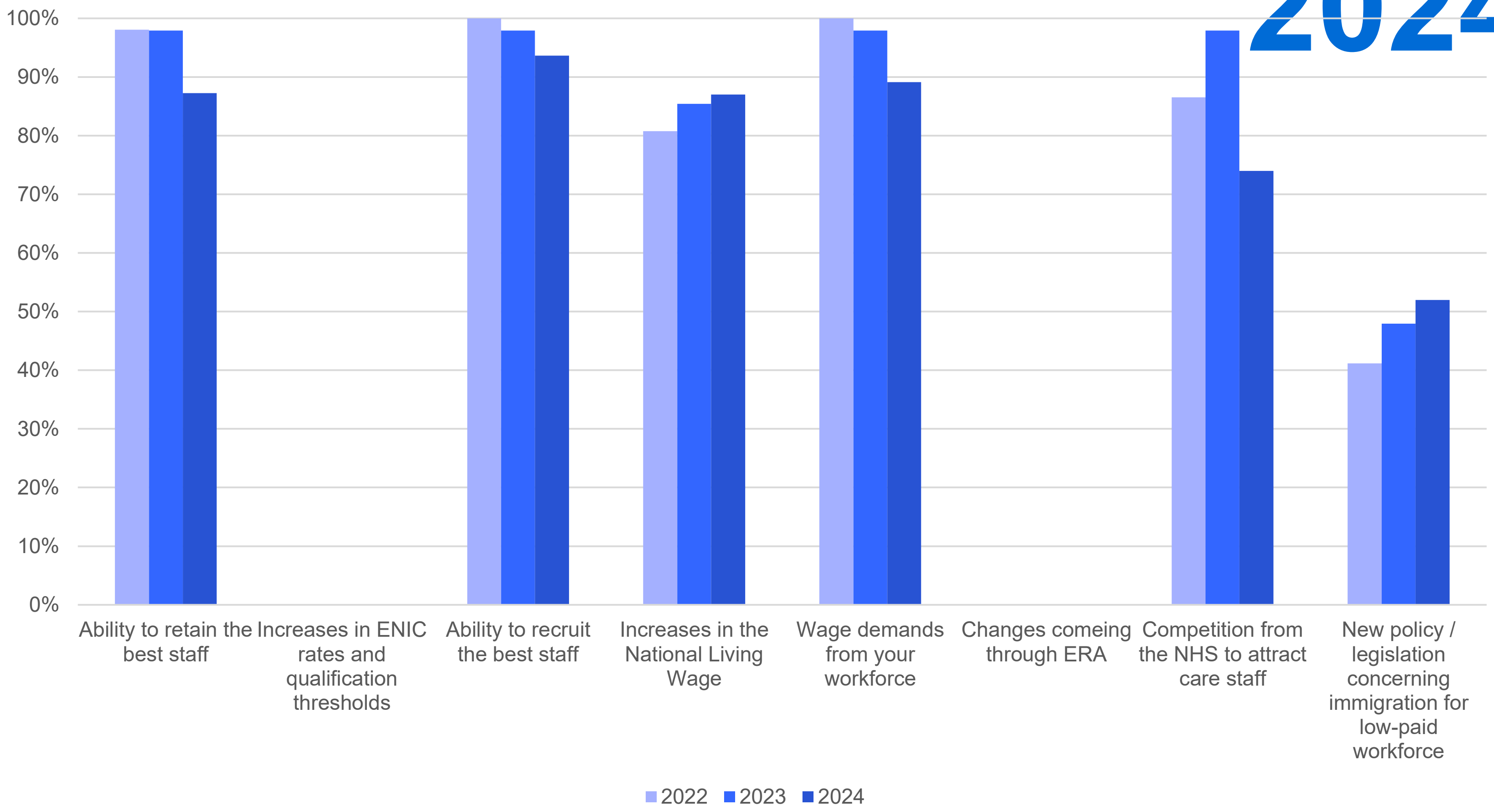


Workforce concerns for the coming year



Workforce concerns for the coming year

2024



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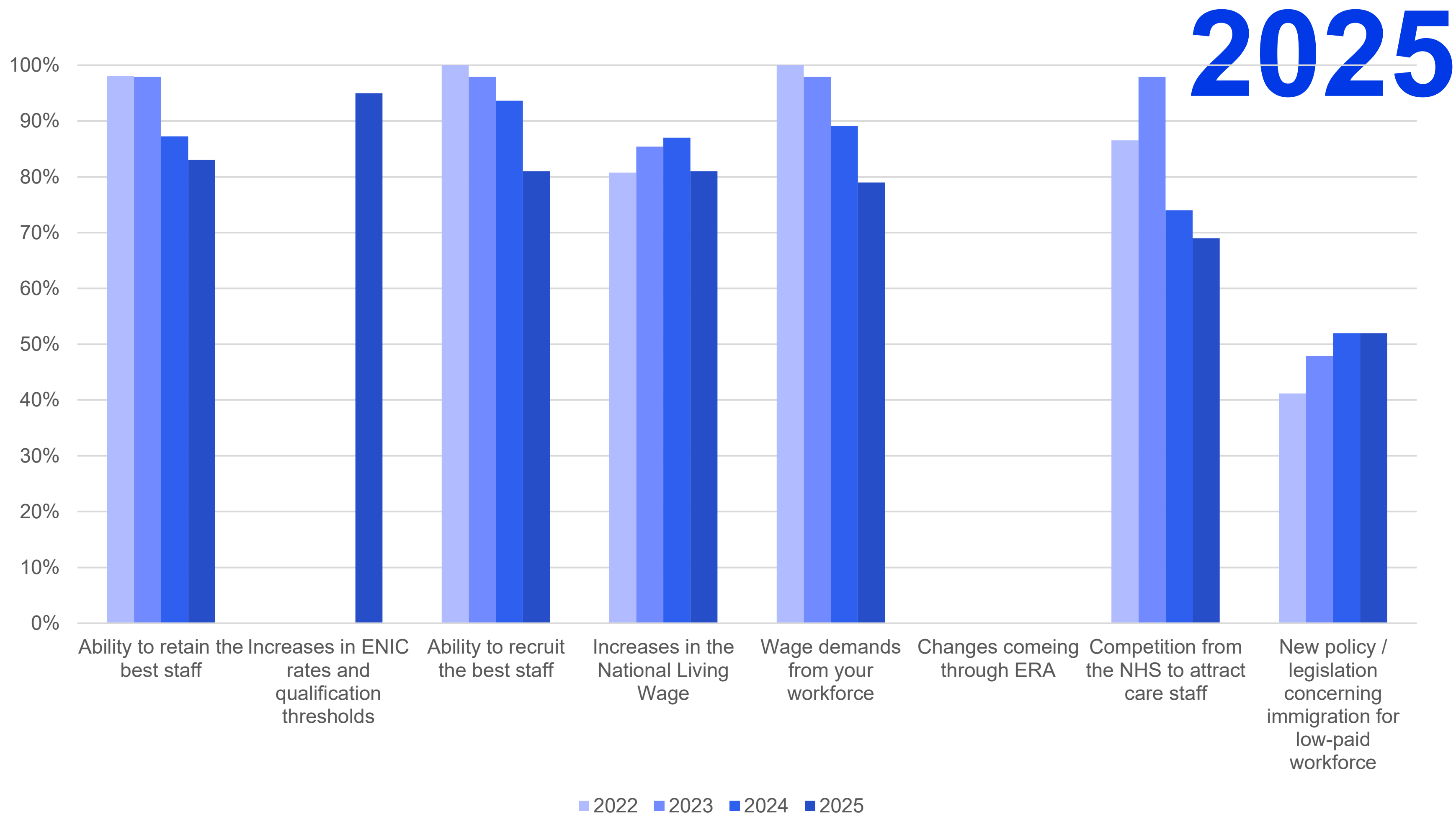

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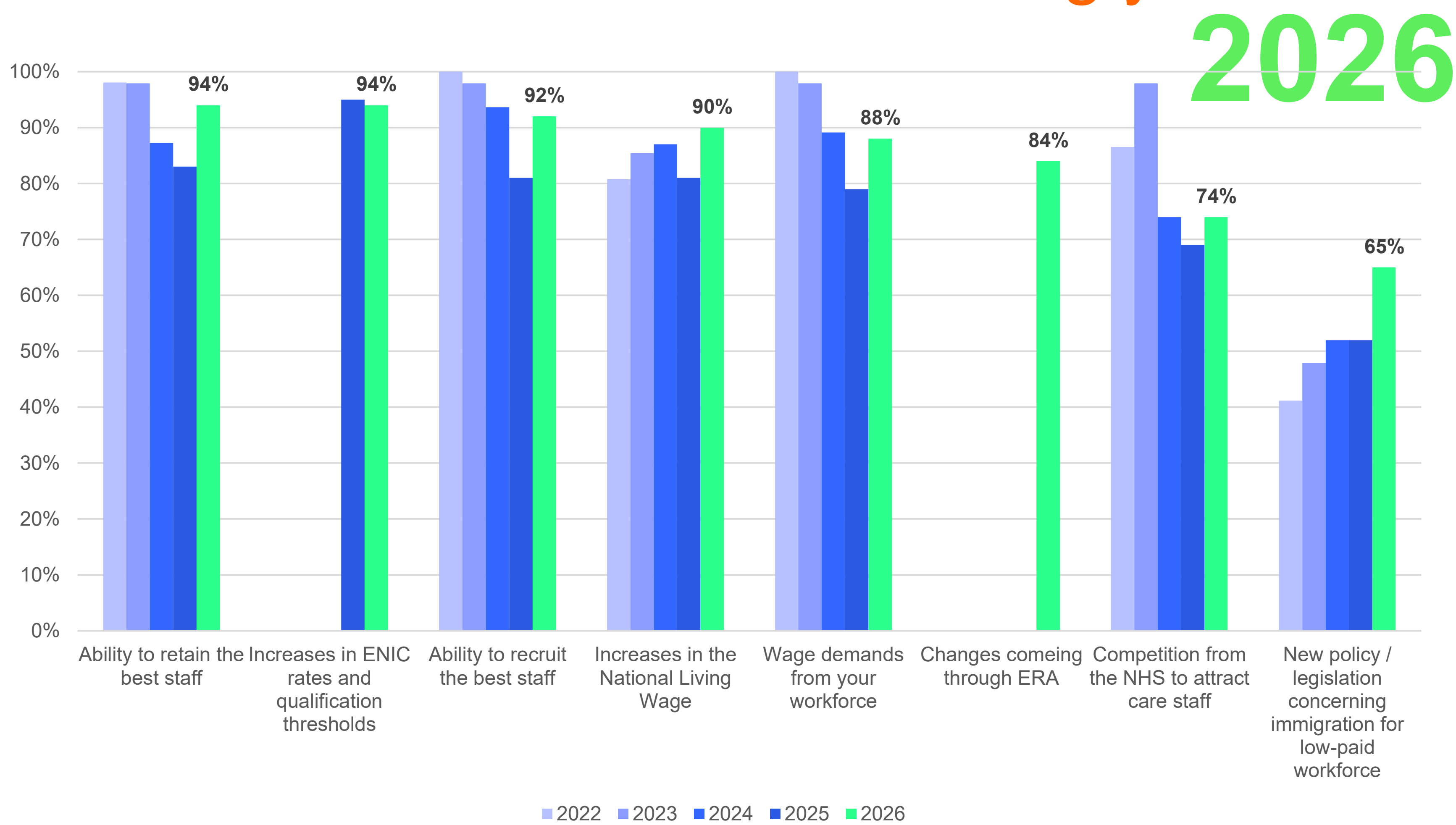


Employers national insurance increase

- On average you reported an increase of around 4% additional cost driven by the change in ENIC
- The range was from around 2% up to as high as 10%
- We asked you about consequences…….

Employers national insurance increase

Limited new hiring
Instigated reviews for vacant posts, reduced hiring overall
Reduced staffing levels

Our workforce plan is to virtually eradicate reliance of agency and so this requires us to fill vacancies - and we will only take people who we think have the right values and skills or who can be supported/trained to have them

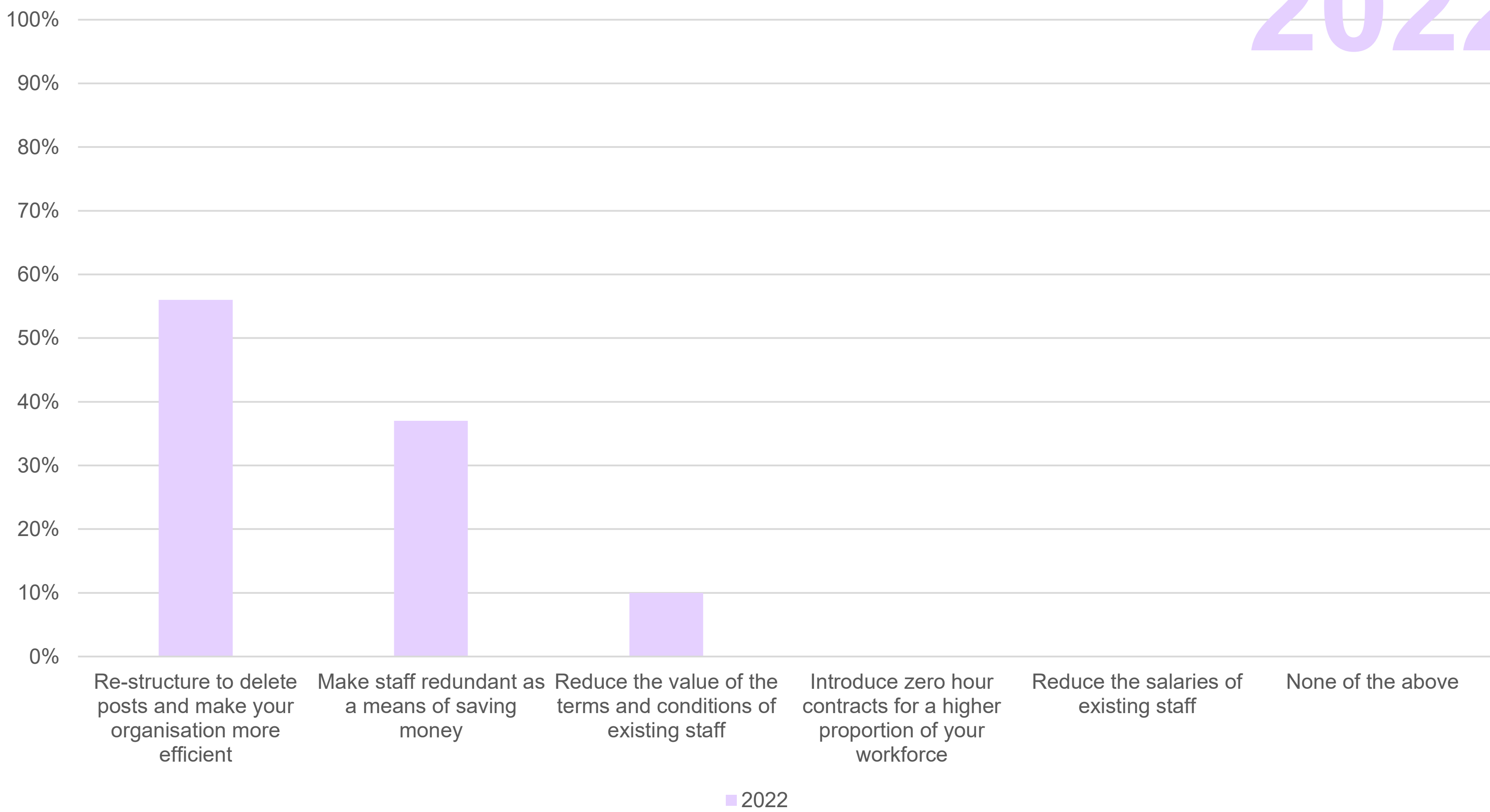
Employers national insurance increase

Freeze on recruitment. reduced handovers, reduced staffing numbers, redundancies. review of care portfolio to close loss making services over the next two years.

We have had to consider more significant changes within the organisation including staff restructures, redundancies, organisational re-structures. All of which has some significant one off cost attached to it that the organisation has to consider.

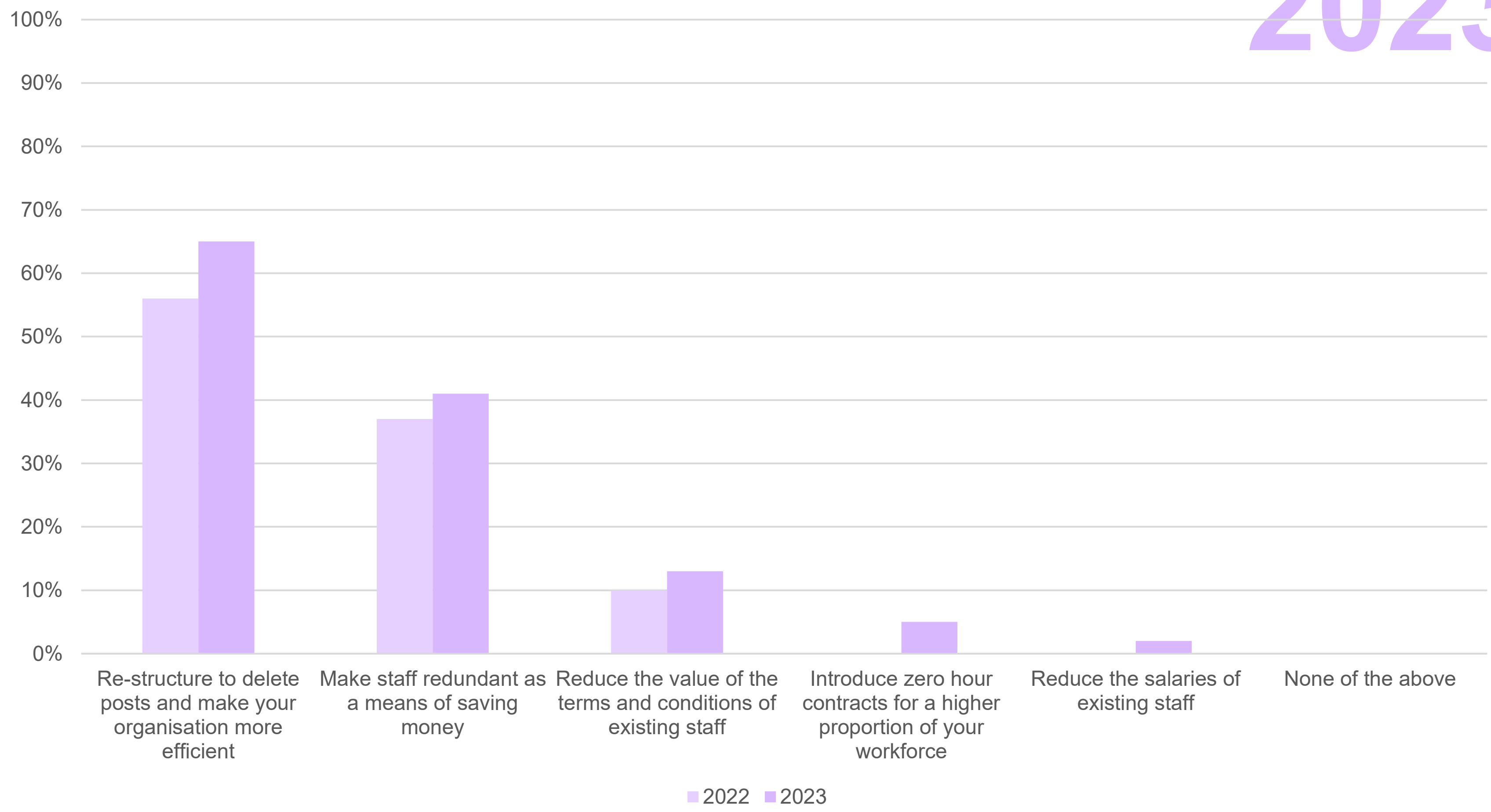
Workforce action taken

2022

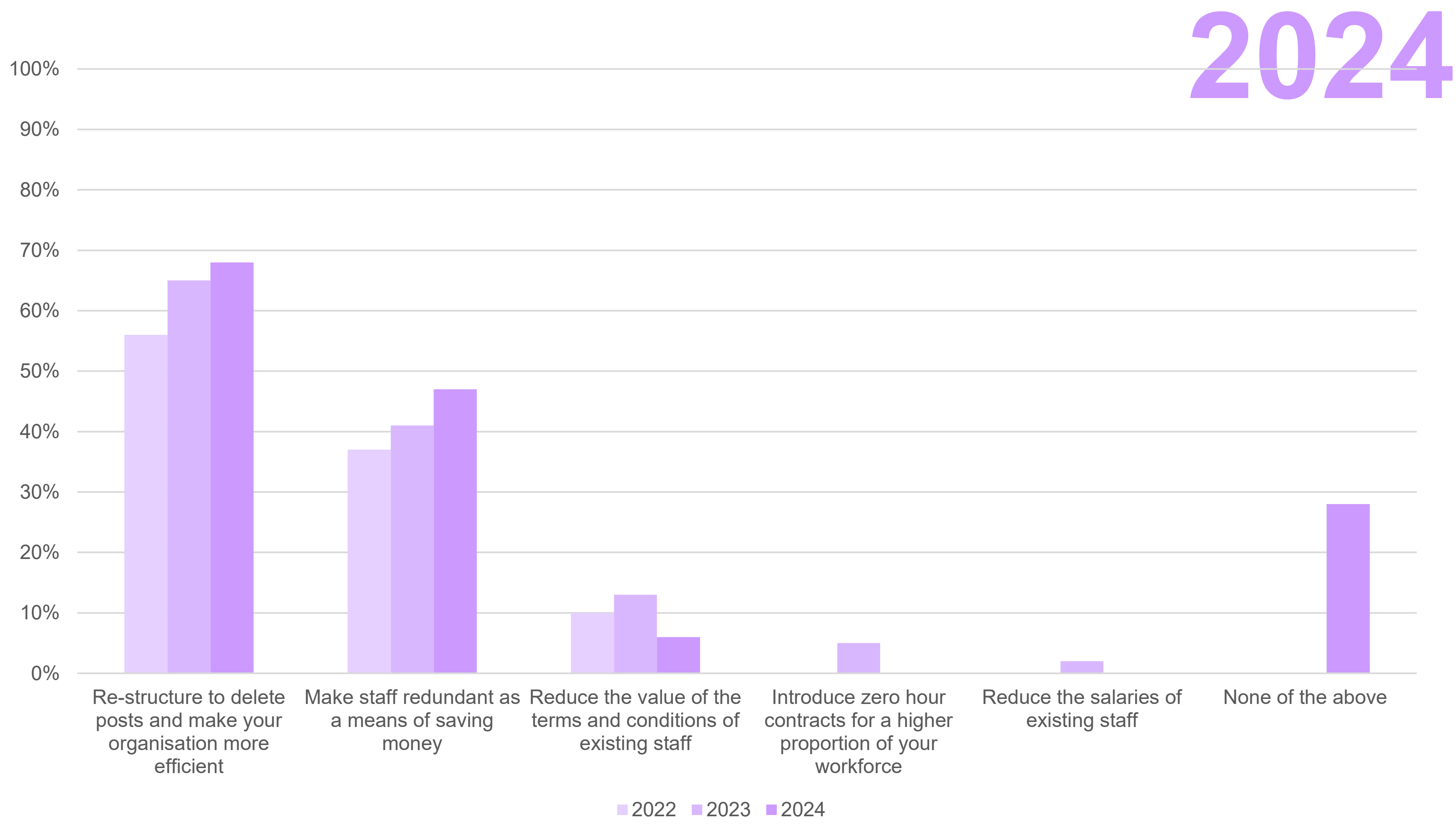


Workforce action taken

2023



Workforce action taken



Workforce action taken

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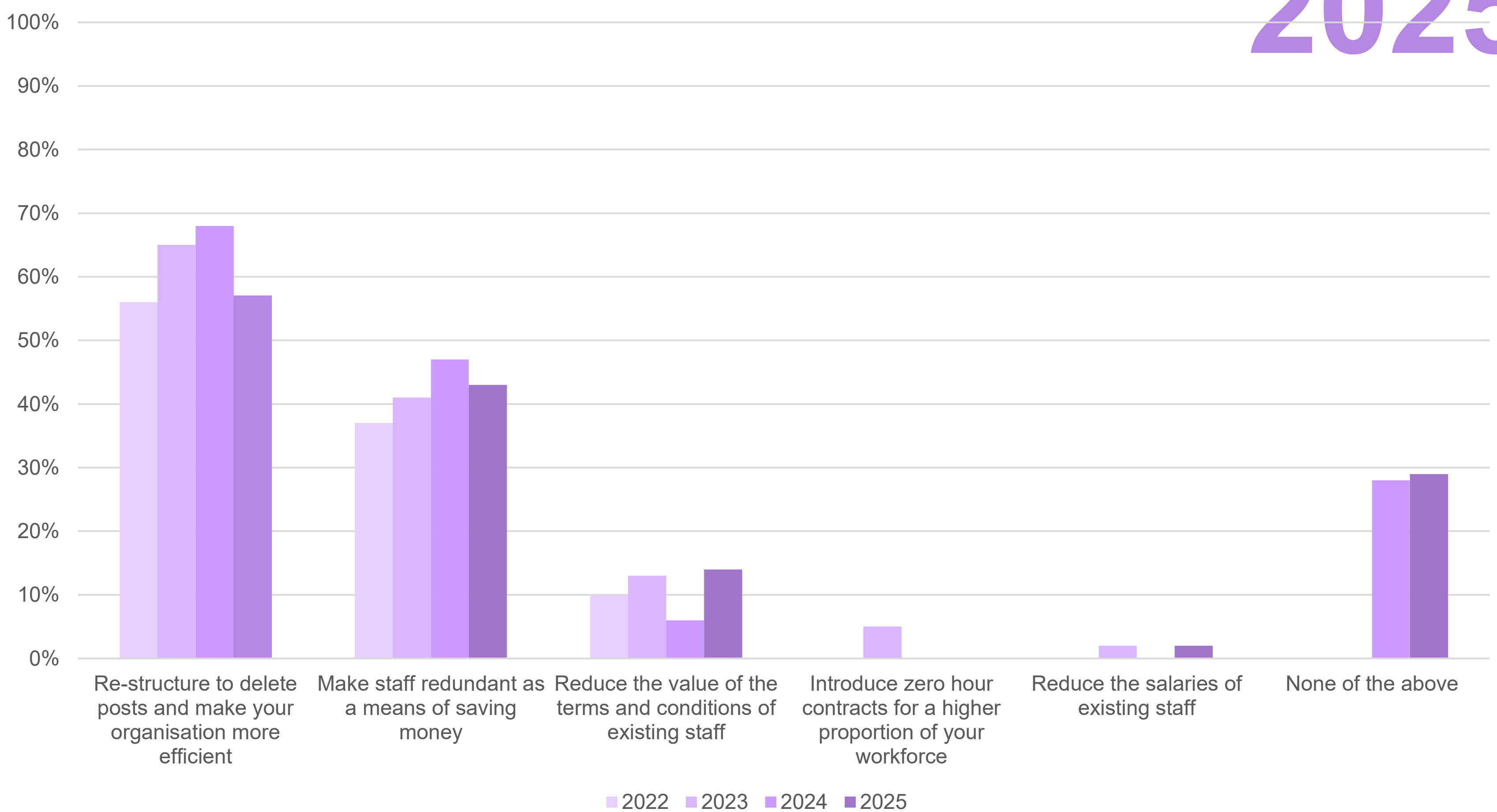

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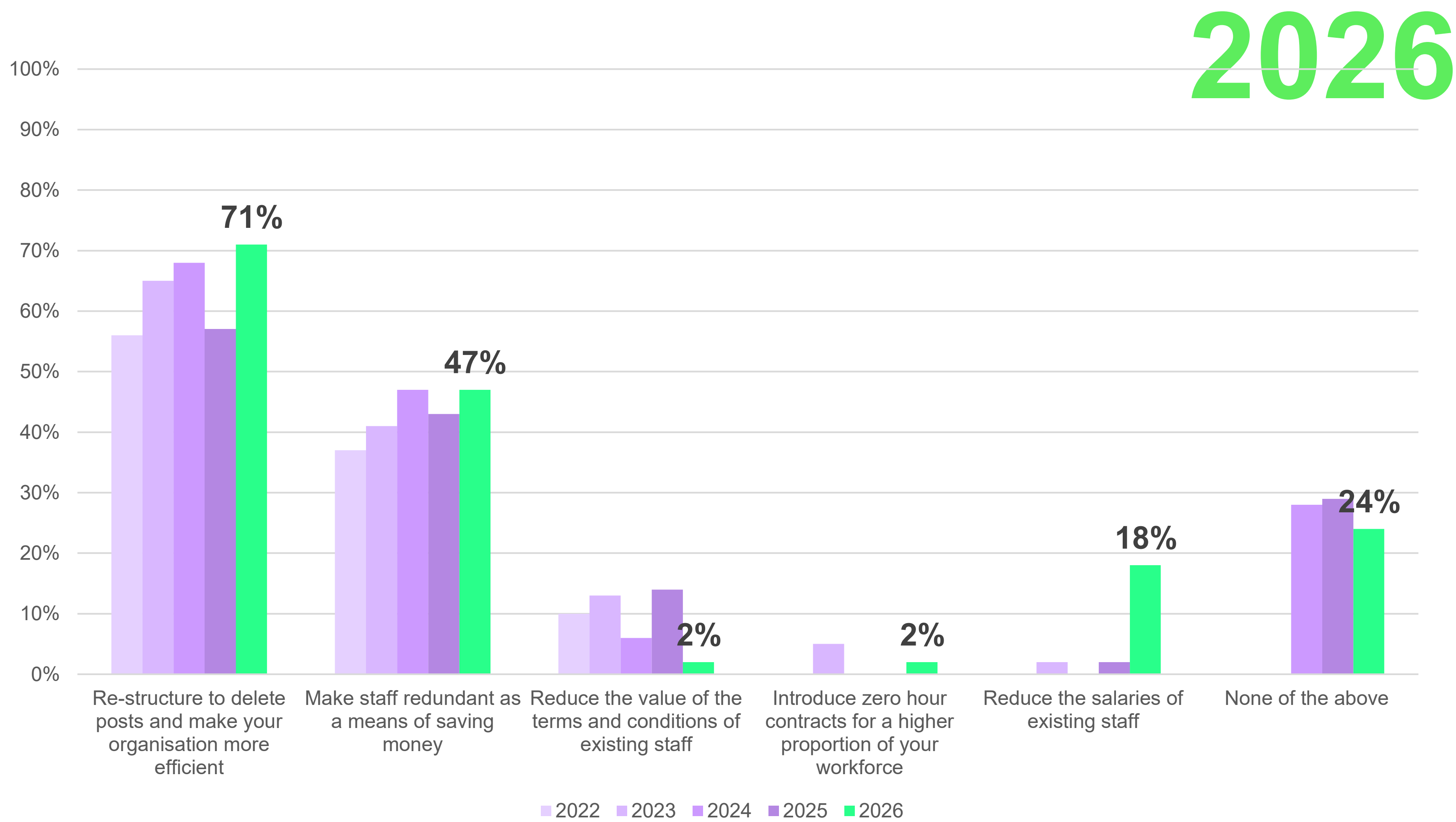
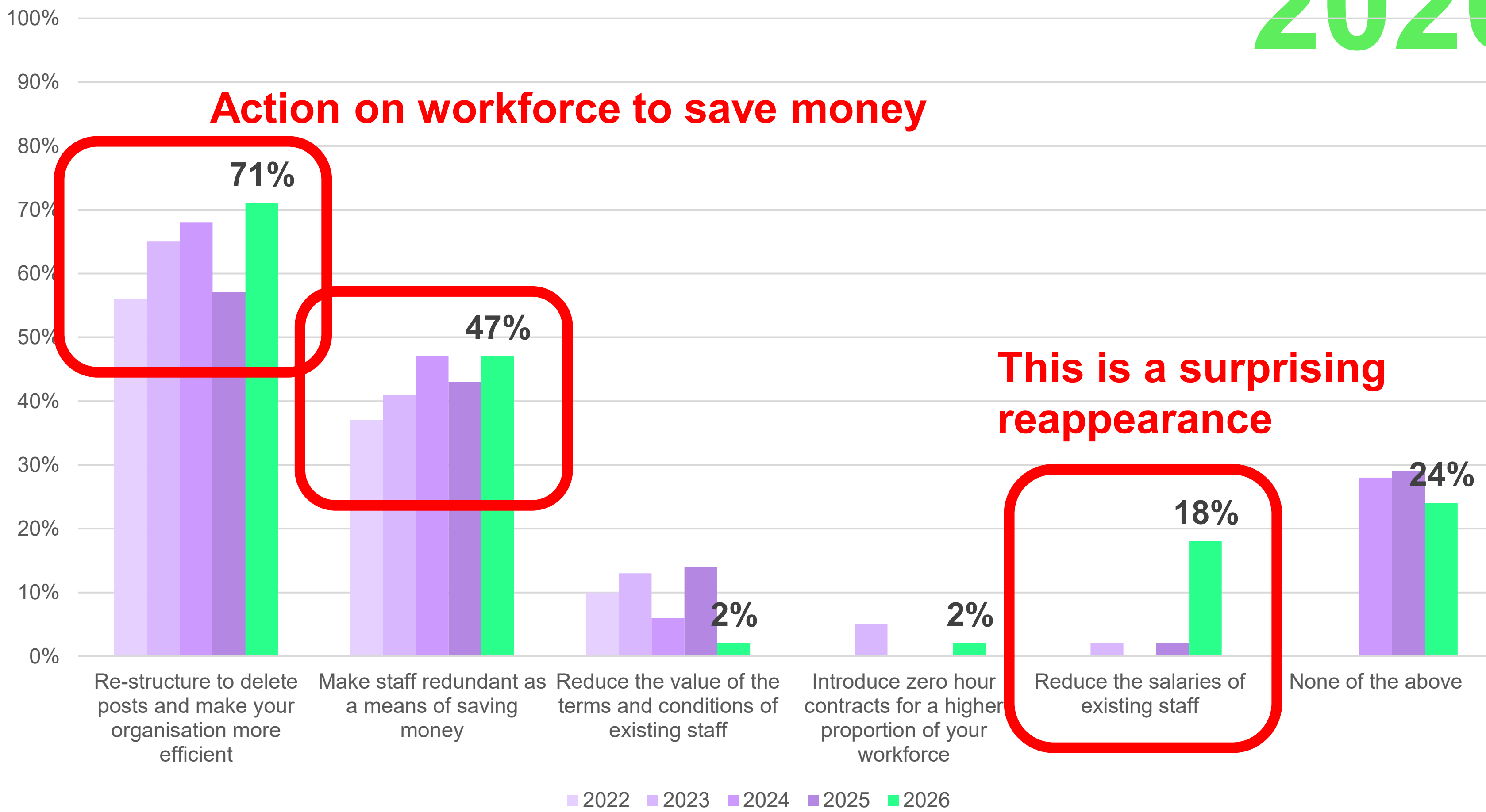


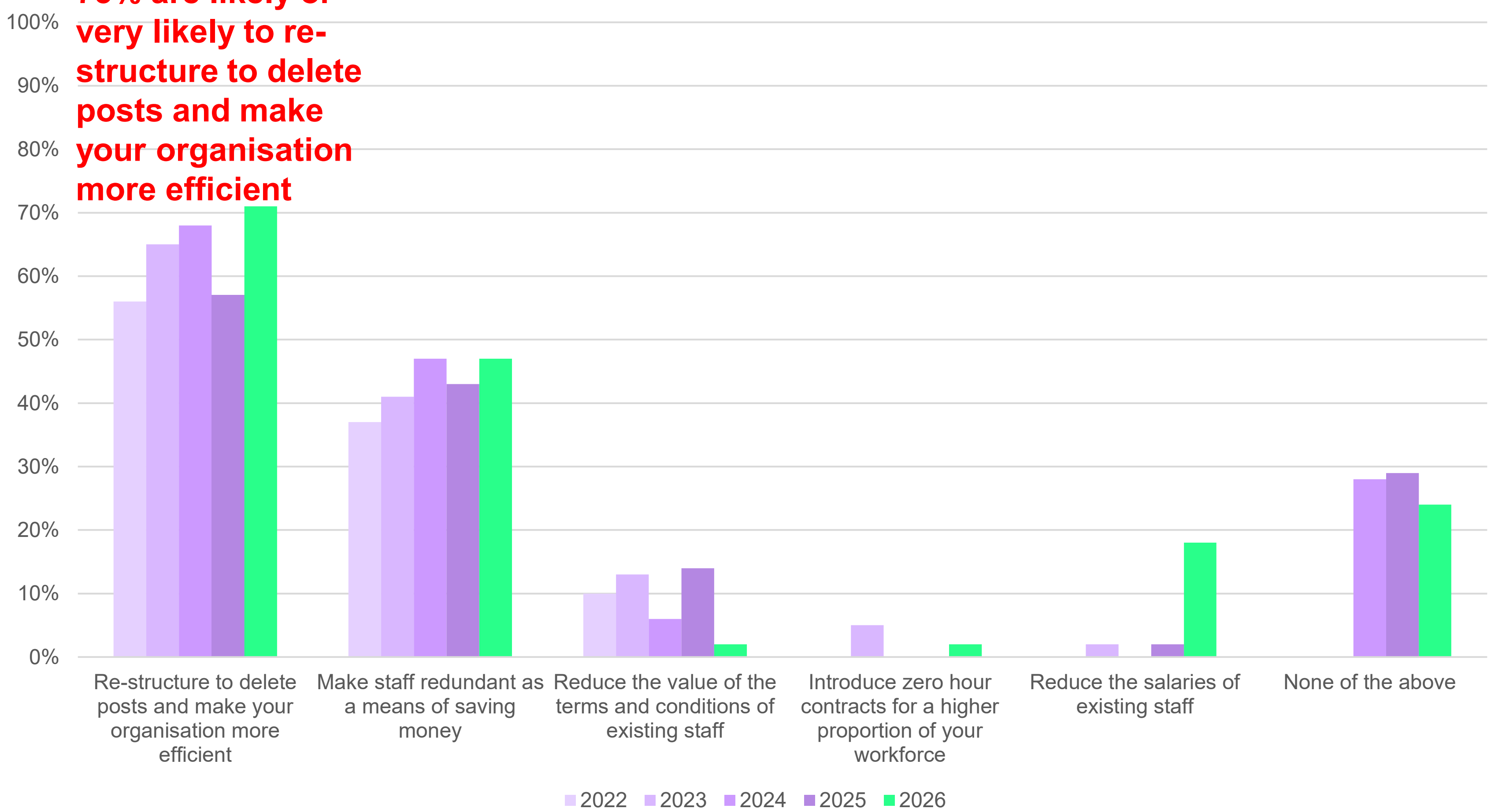
Workforce action taken

2026

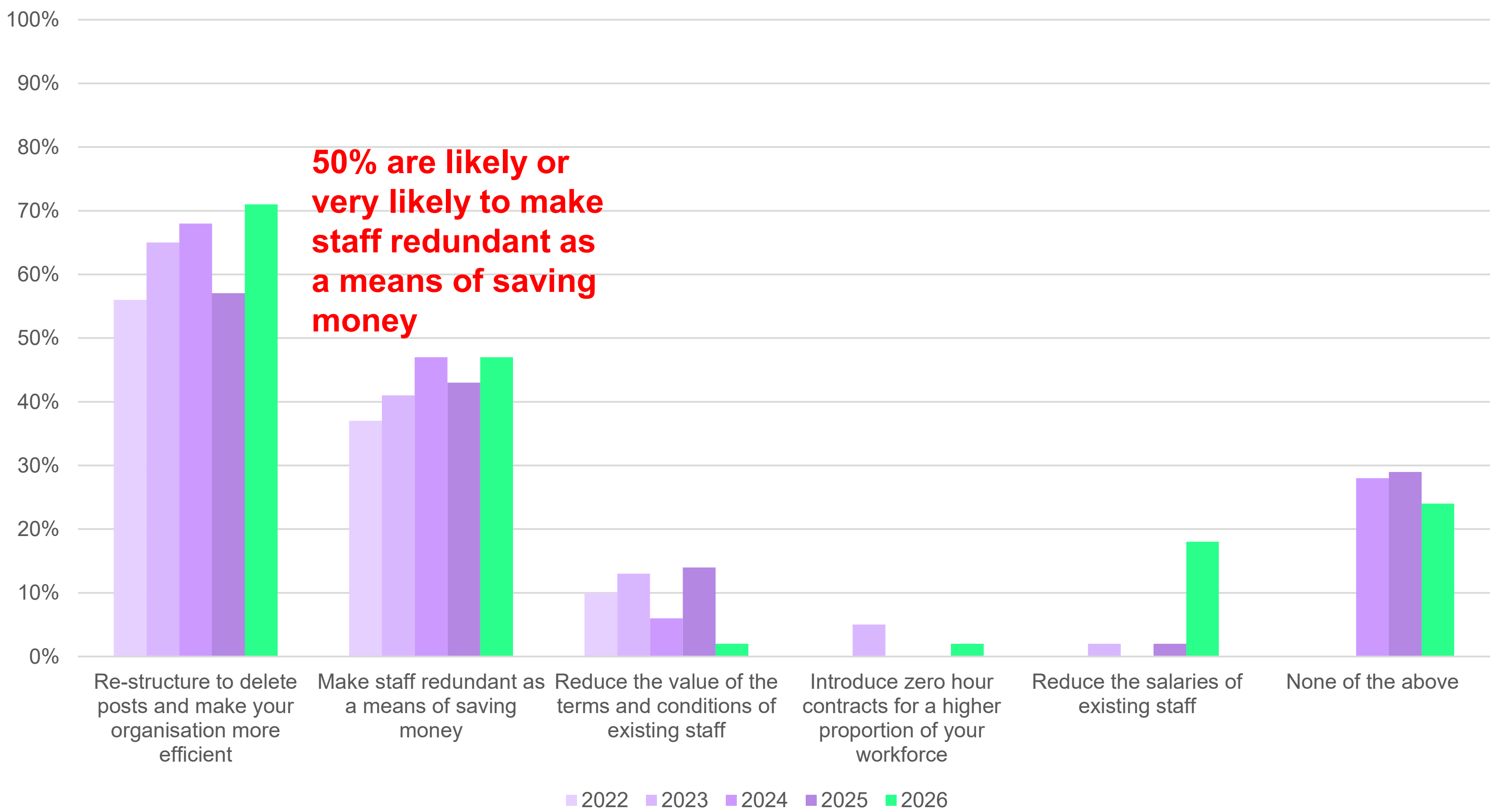


Workforce action considered

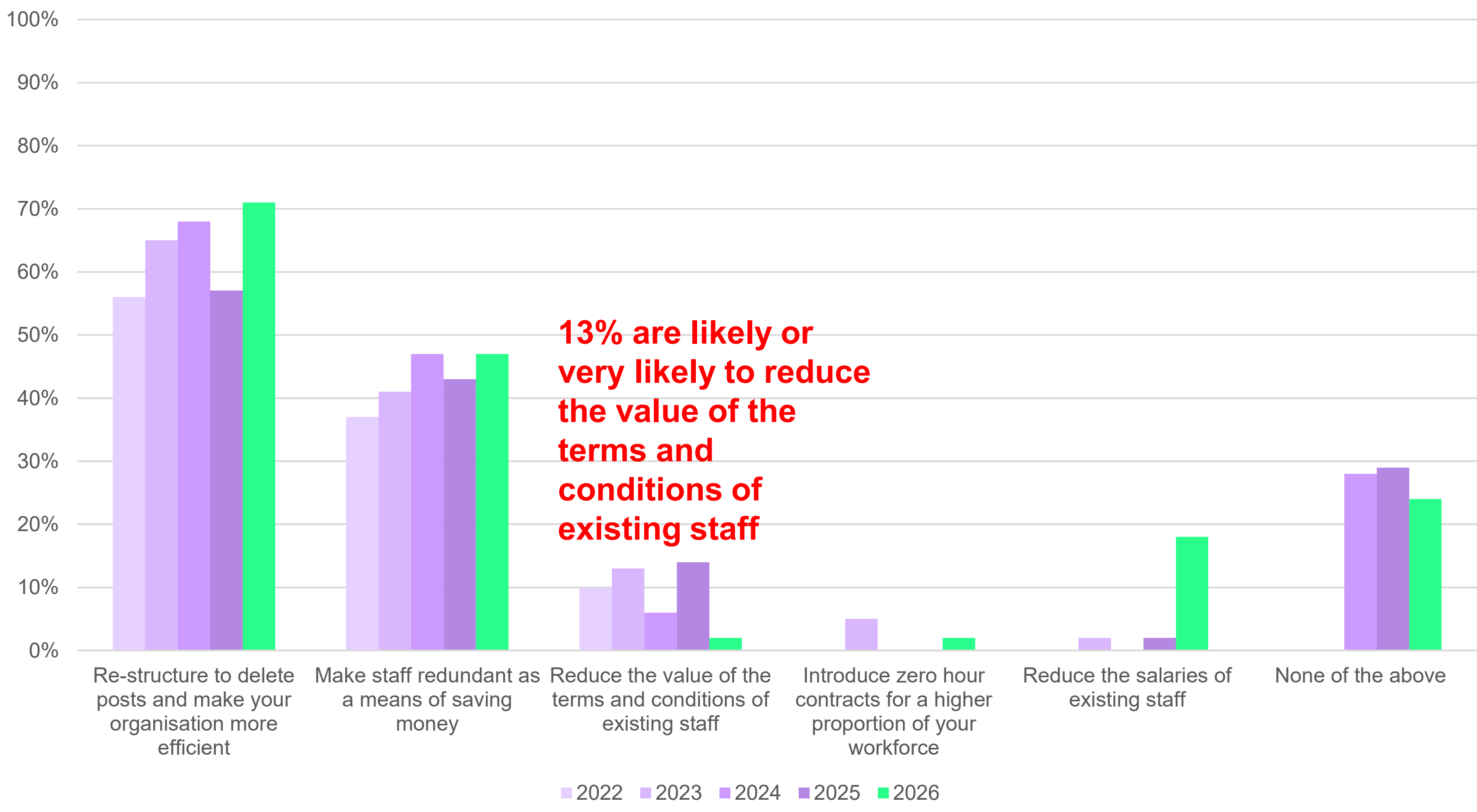
75% are likely or very likely to re-structure to delete posts and make your organisation more efficient



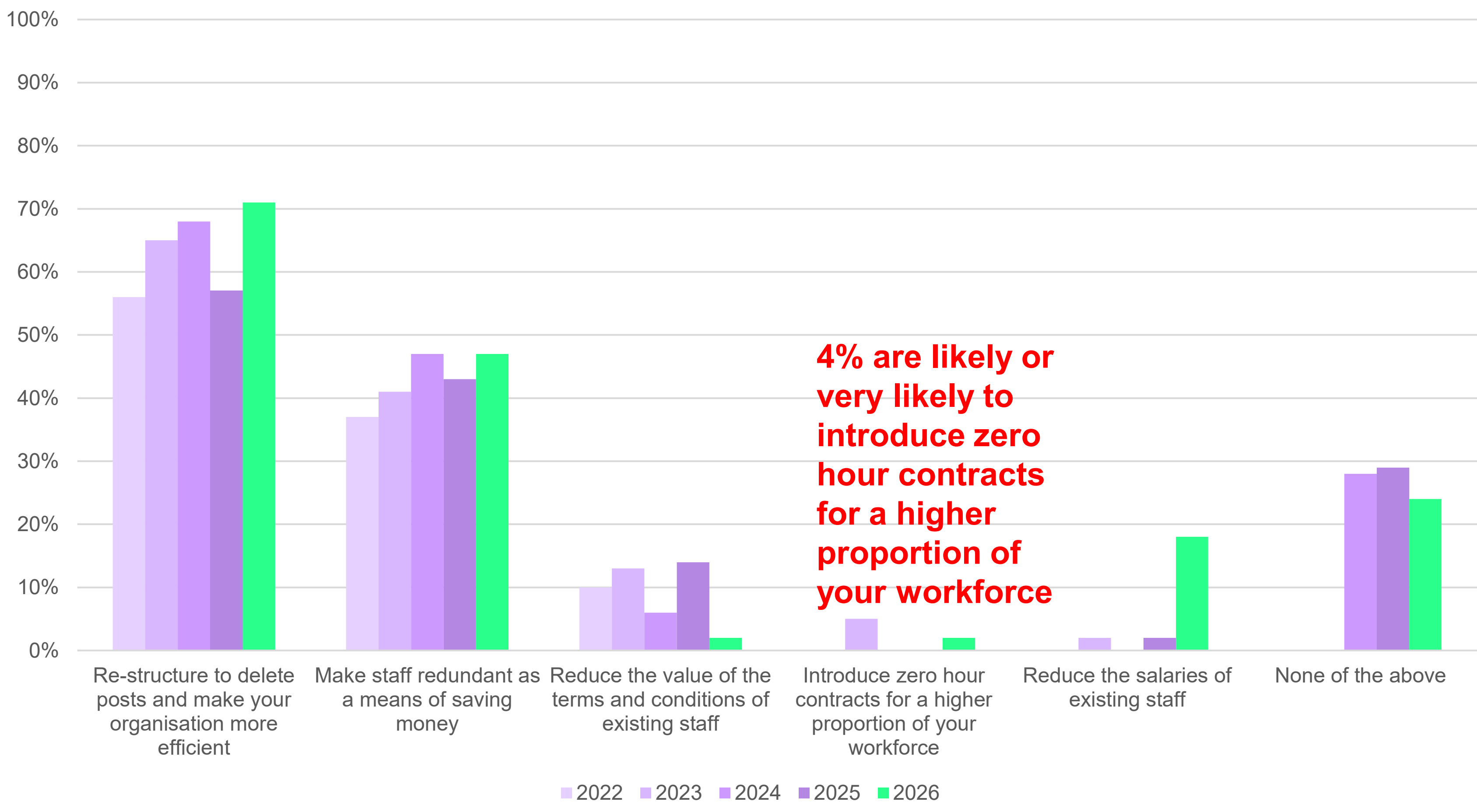
Workforce action considered



Workforce action considered



Workforce action considered



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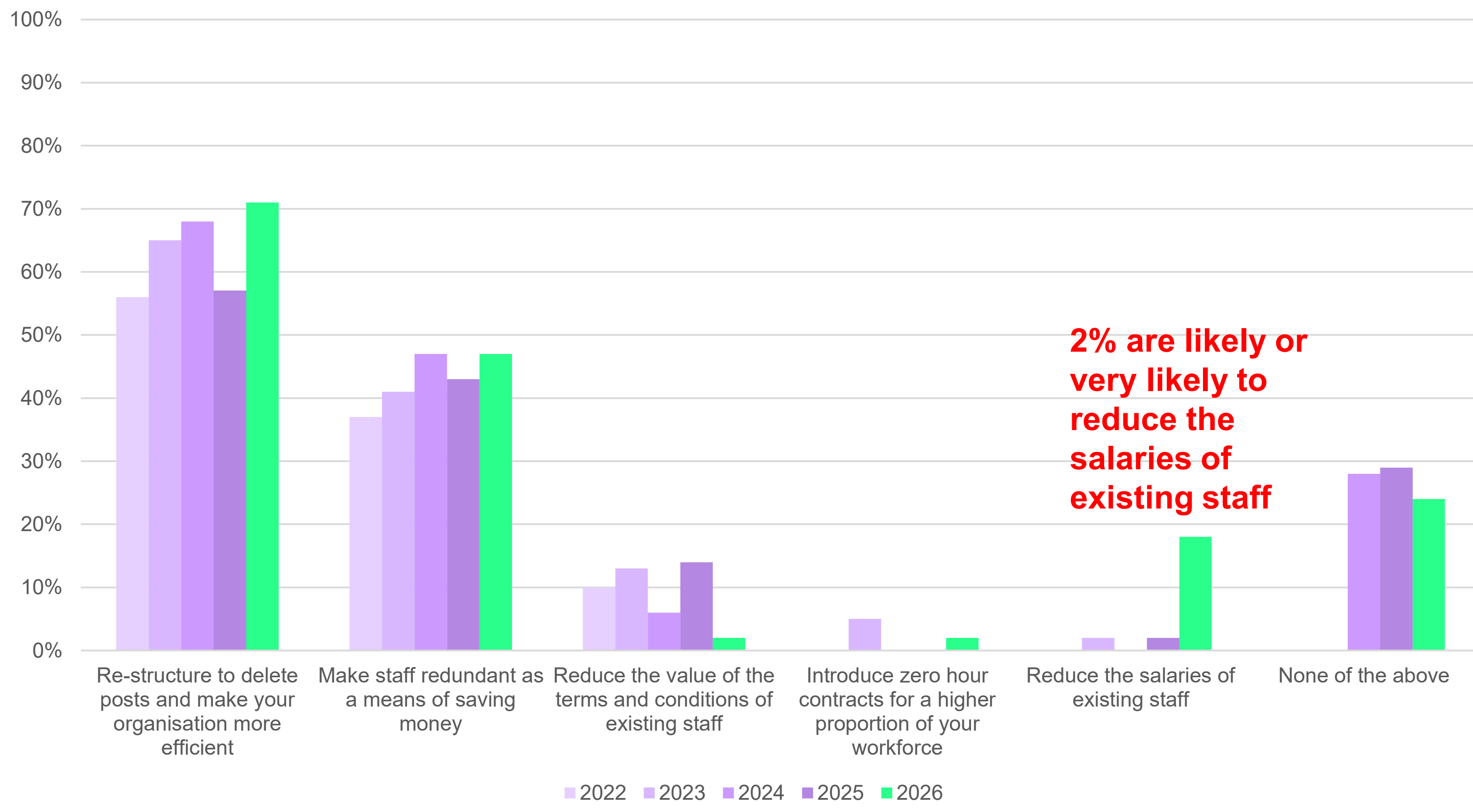
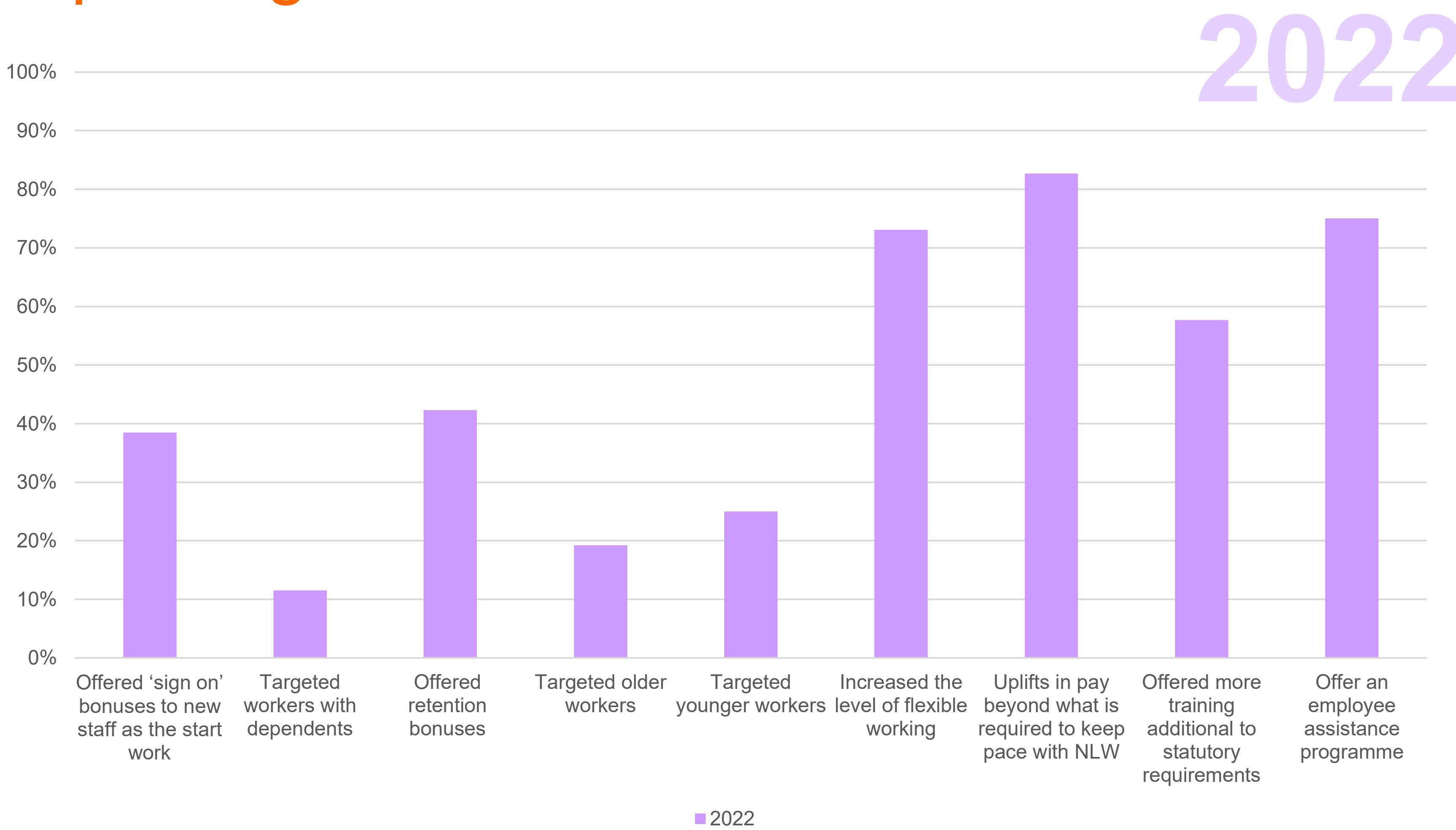
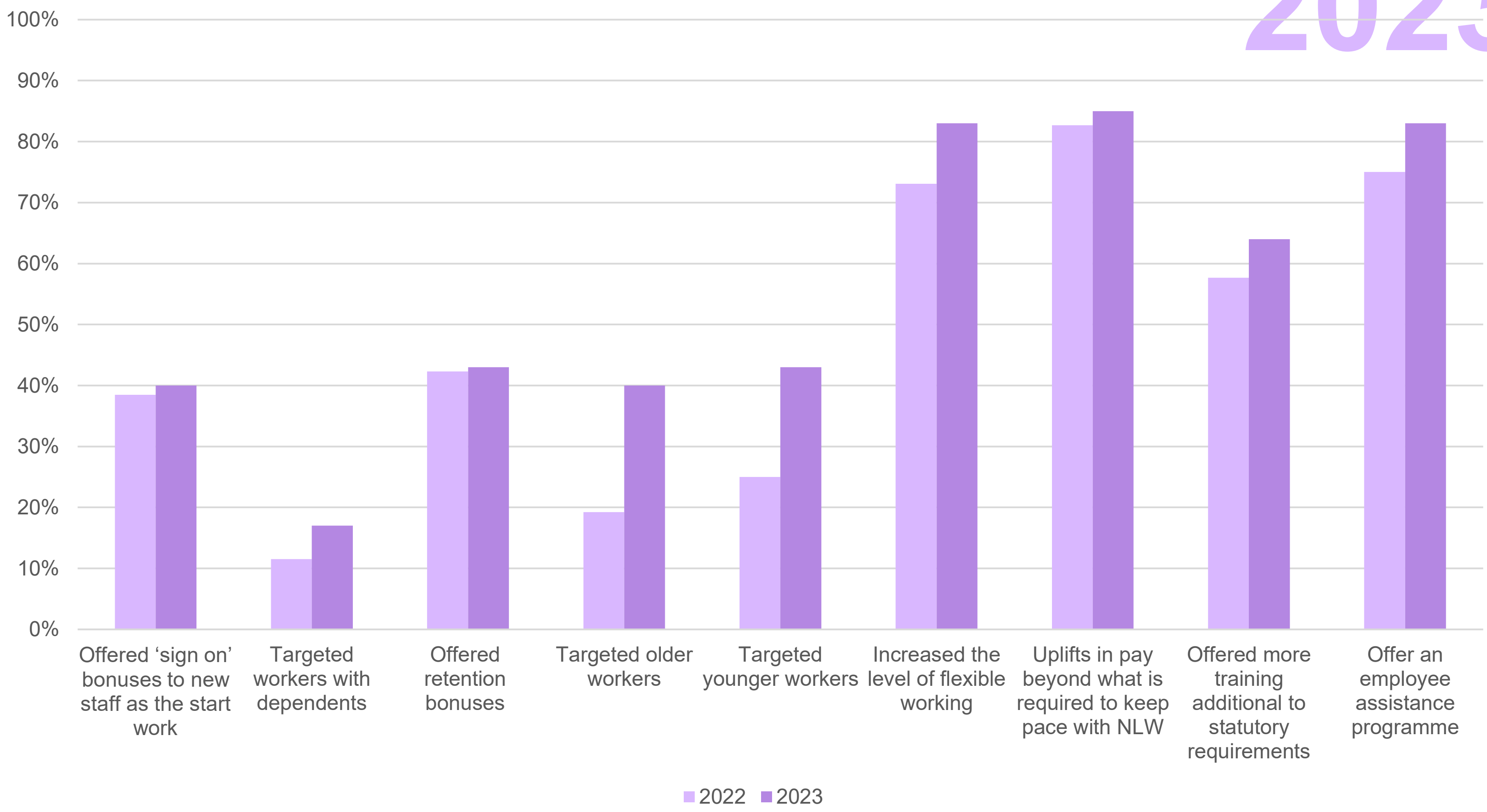


Improving recruitment and retention



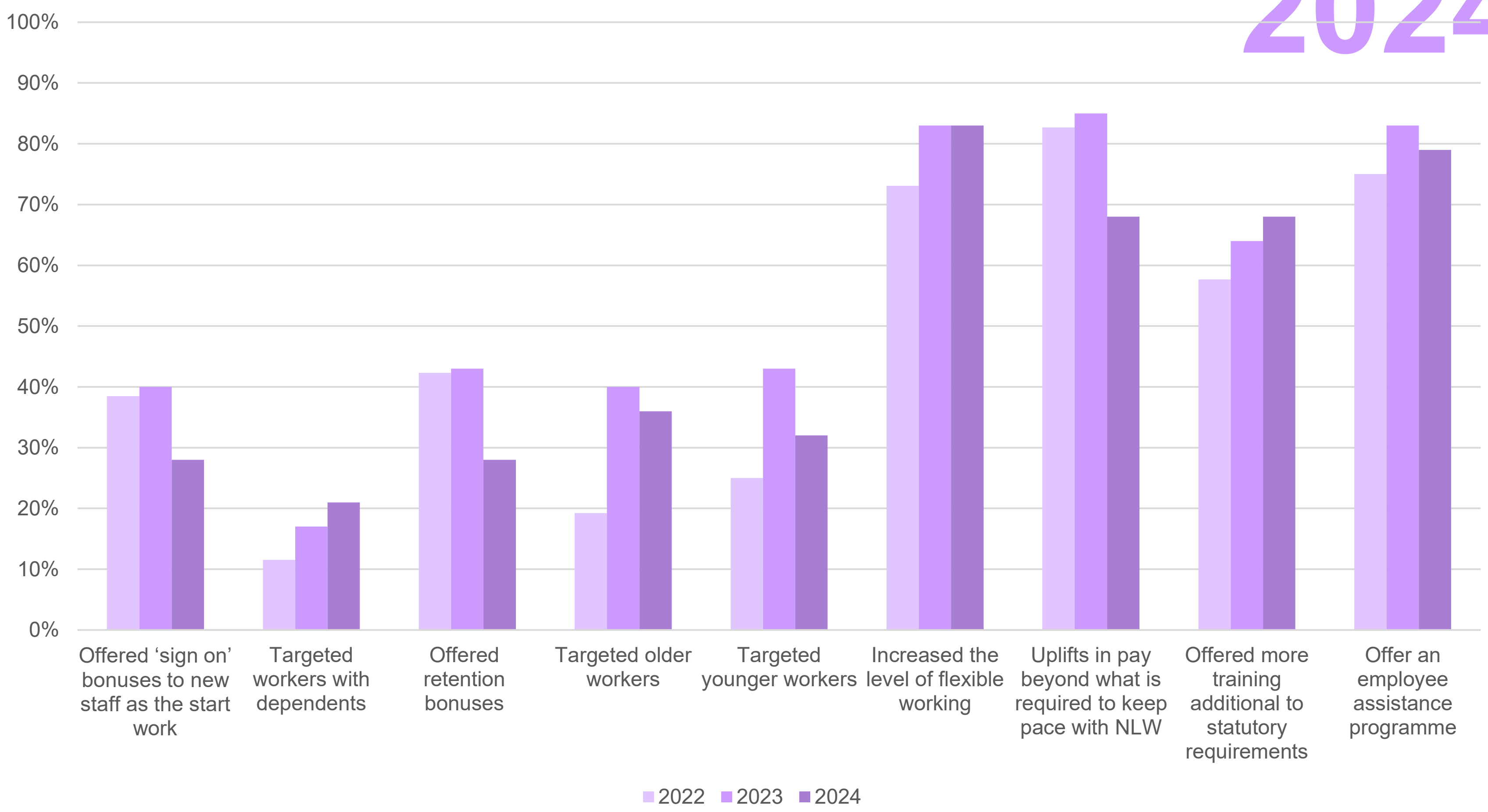
Improving recruitment and retention

2023



Improving recruitment and retention

2024



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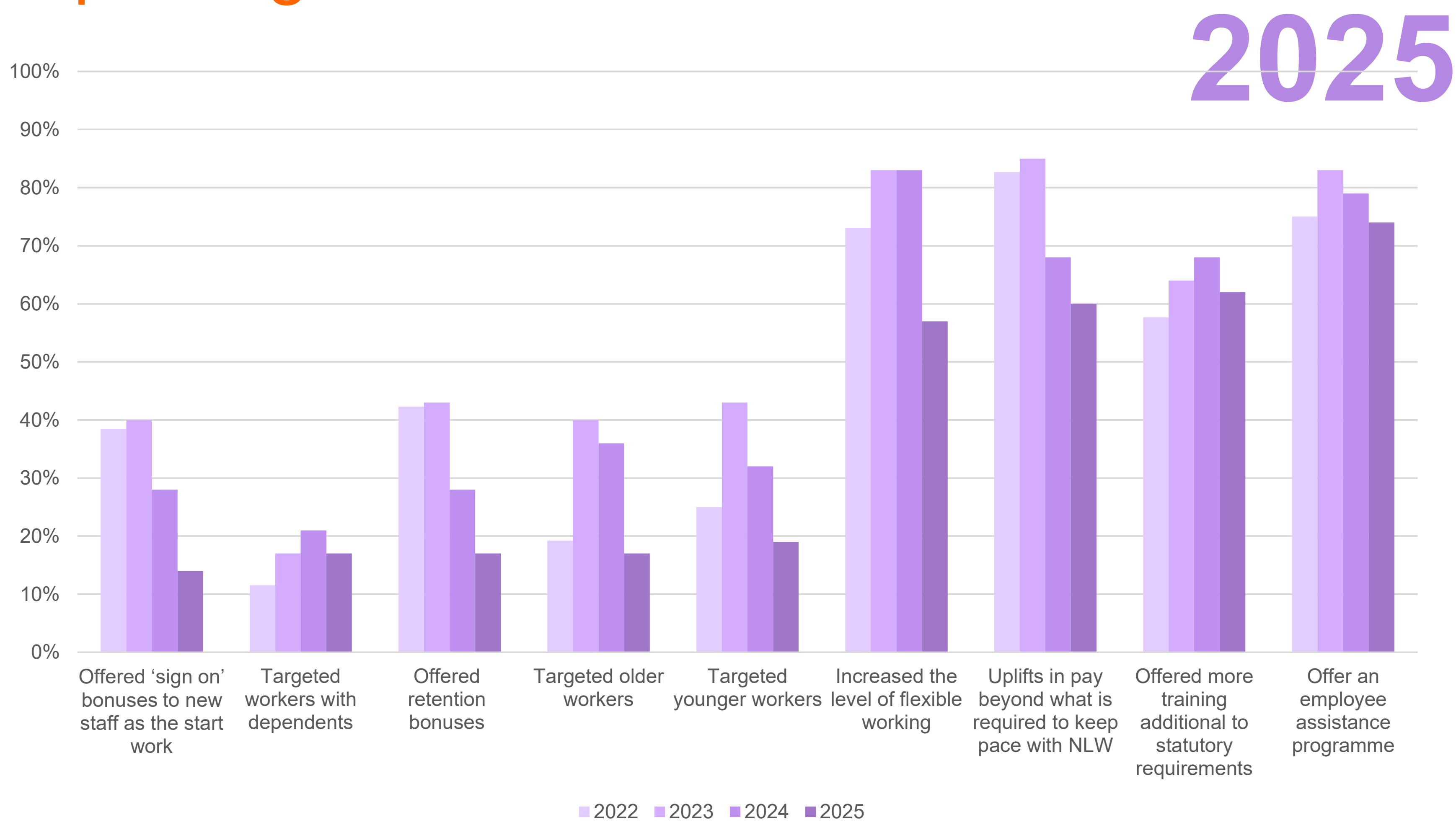

Improving recruitment and retention

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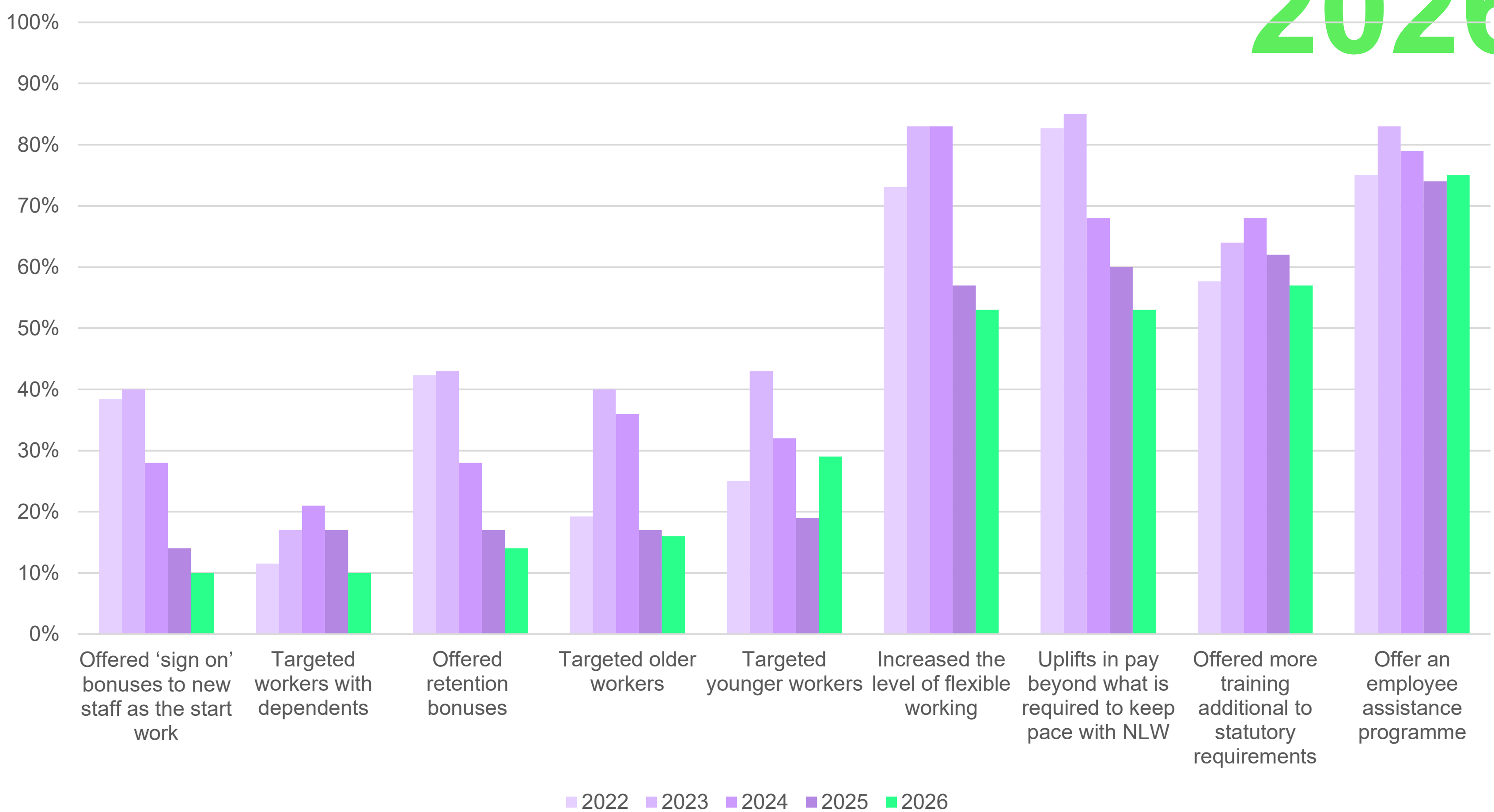
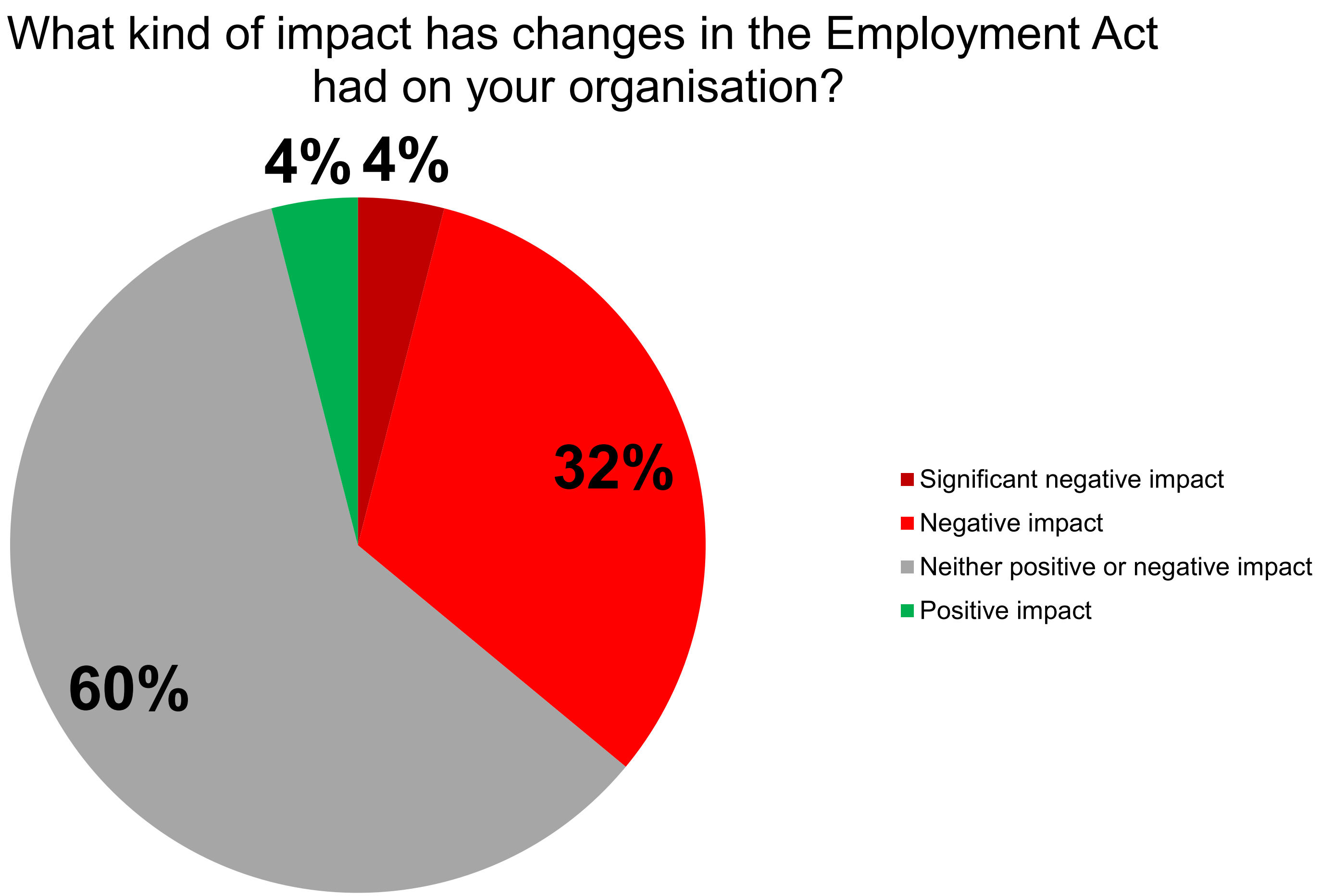


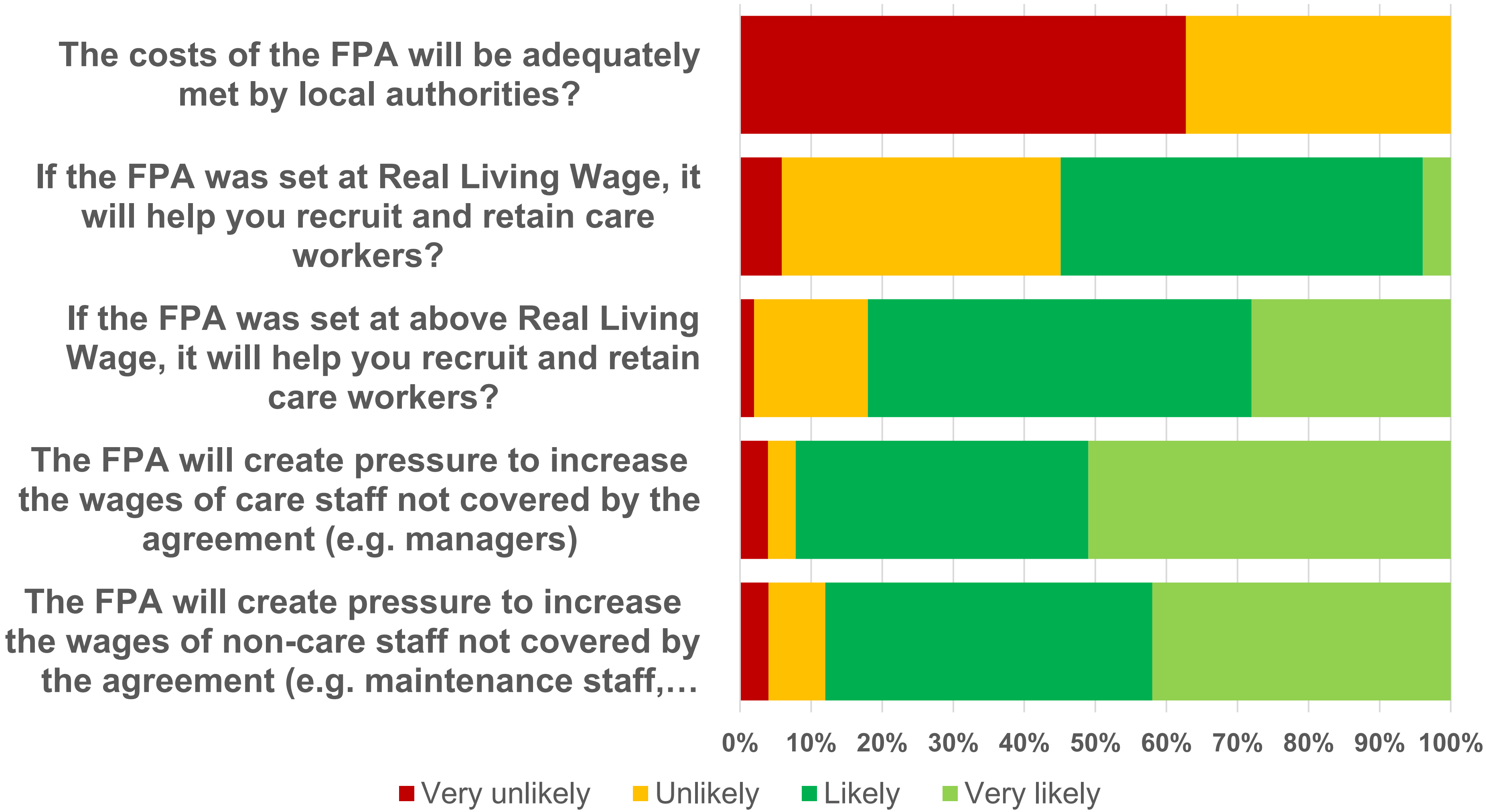
Workforce concerns for the coming year

- The slight reduction in concern around workforce is also reflected in the approach you are taking to improve recruitment and retention, in every case you are doing a little less than you were before.
- There are two areas in particular which standout, firstly around flexible working, which may be a reflection that you have reached the limits of what you think it is possible to do.
- You are starting to become more focused on younger workers

Your thoughts on the Employment Rights Act



Your thoughts on the Fair Pay Agreement



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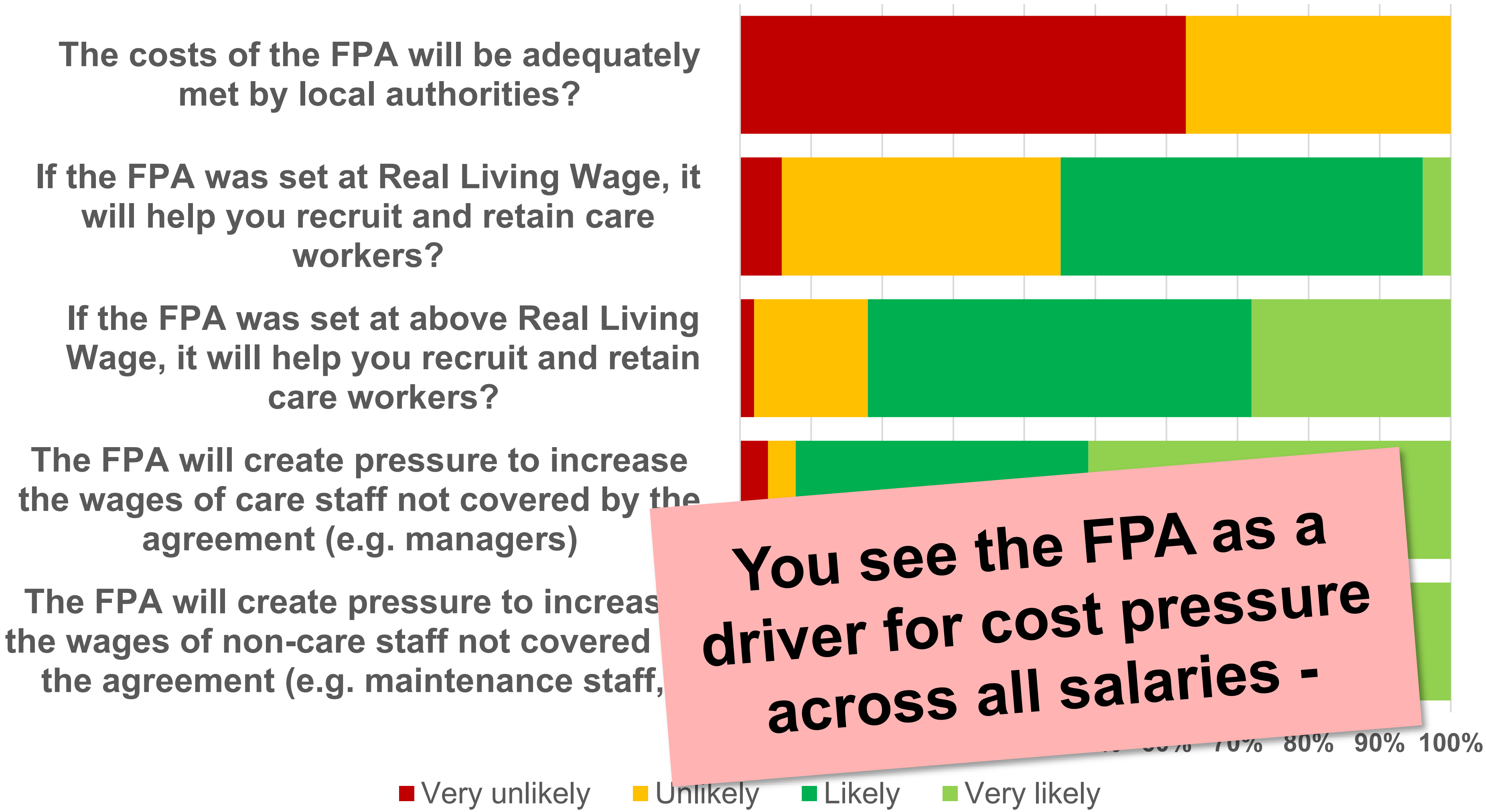

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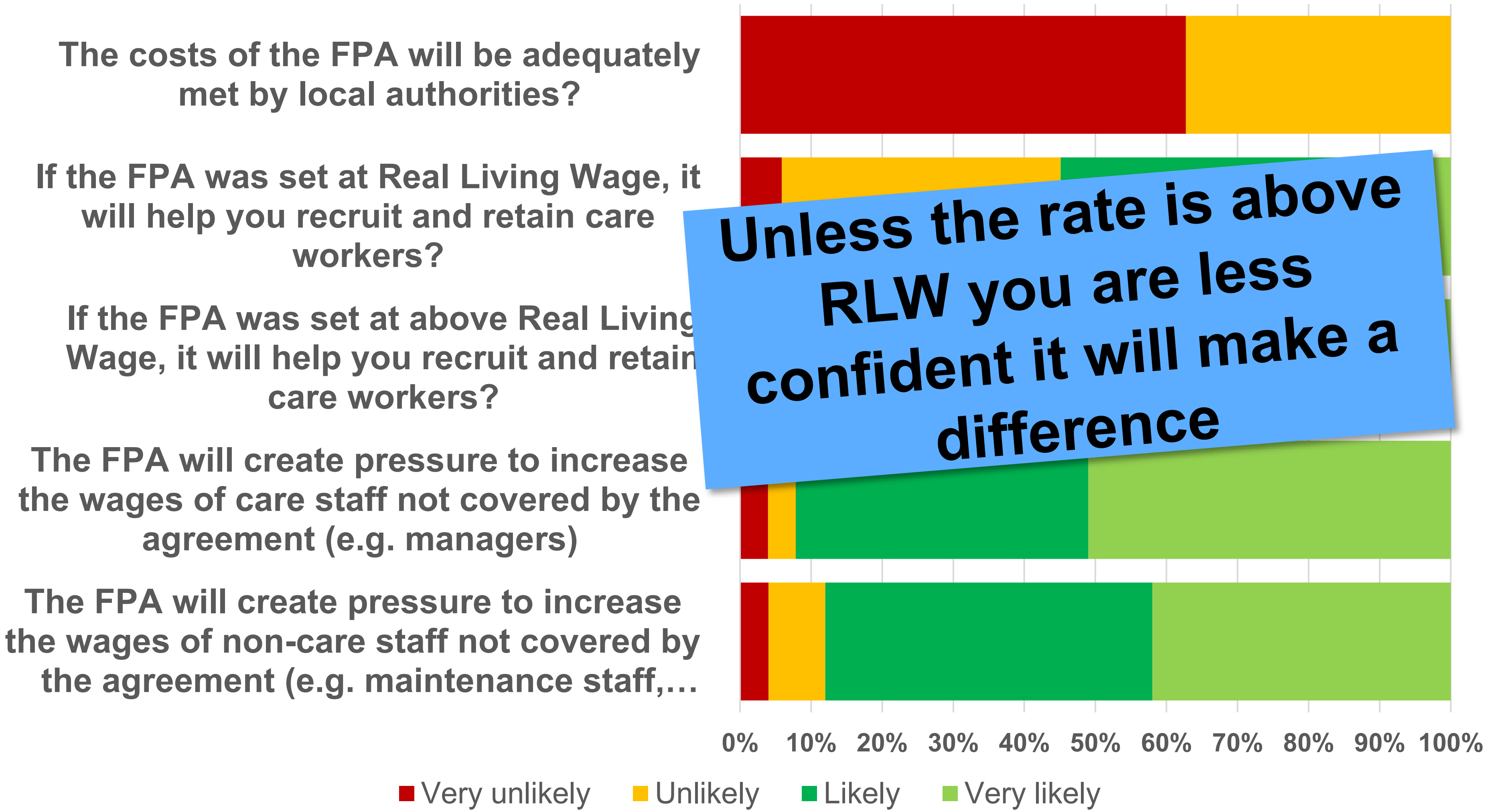
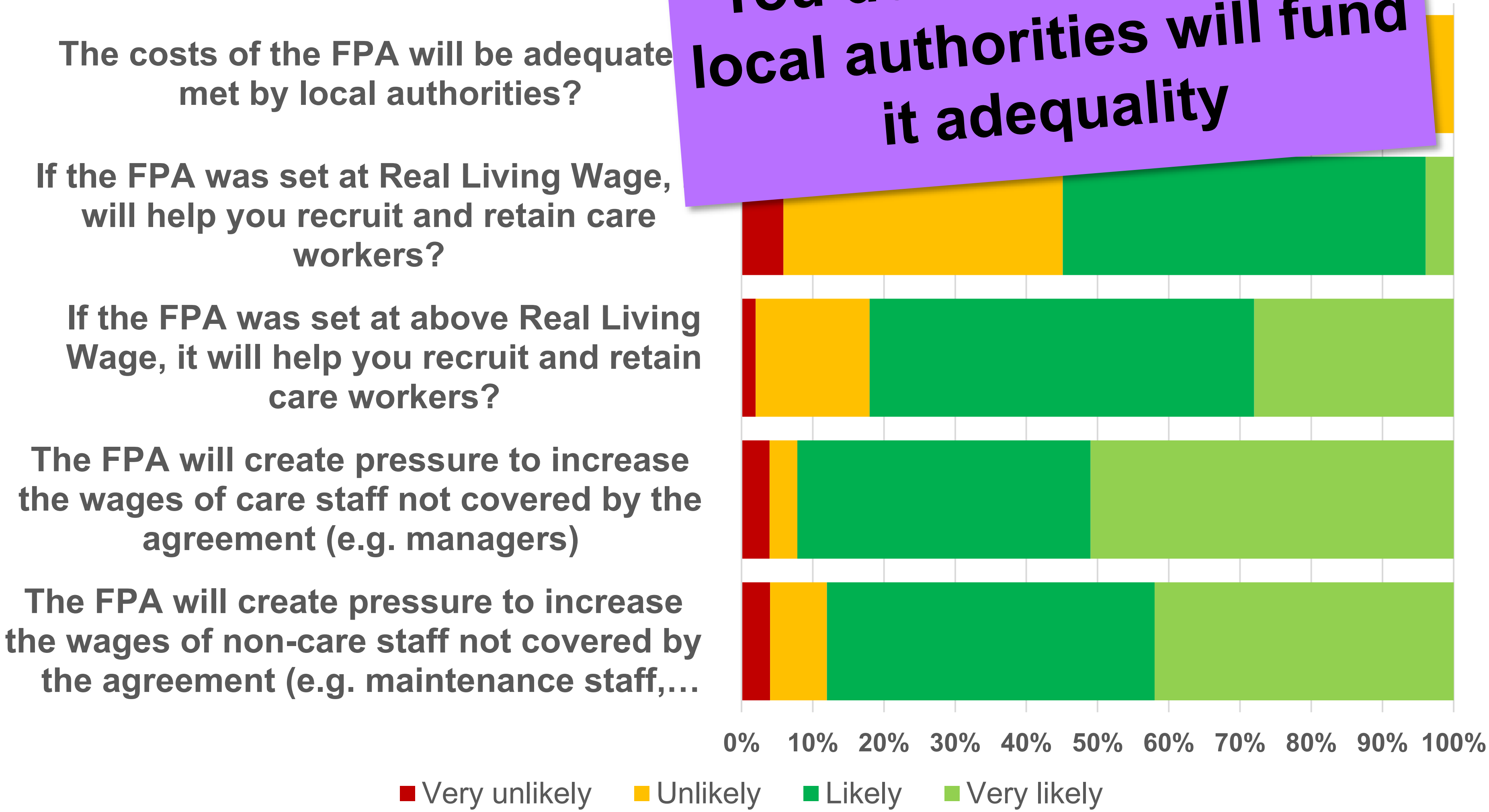


V O D G
Voluntary Organisations Disability Group

Your thoughts on the F

You do not believe that local authorities will fund it adequality



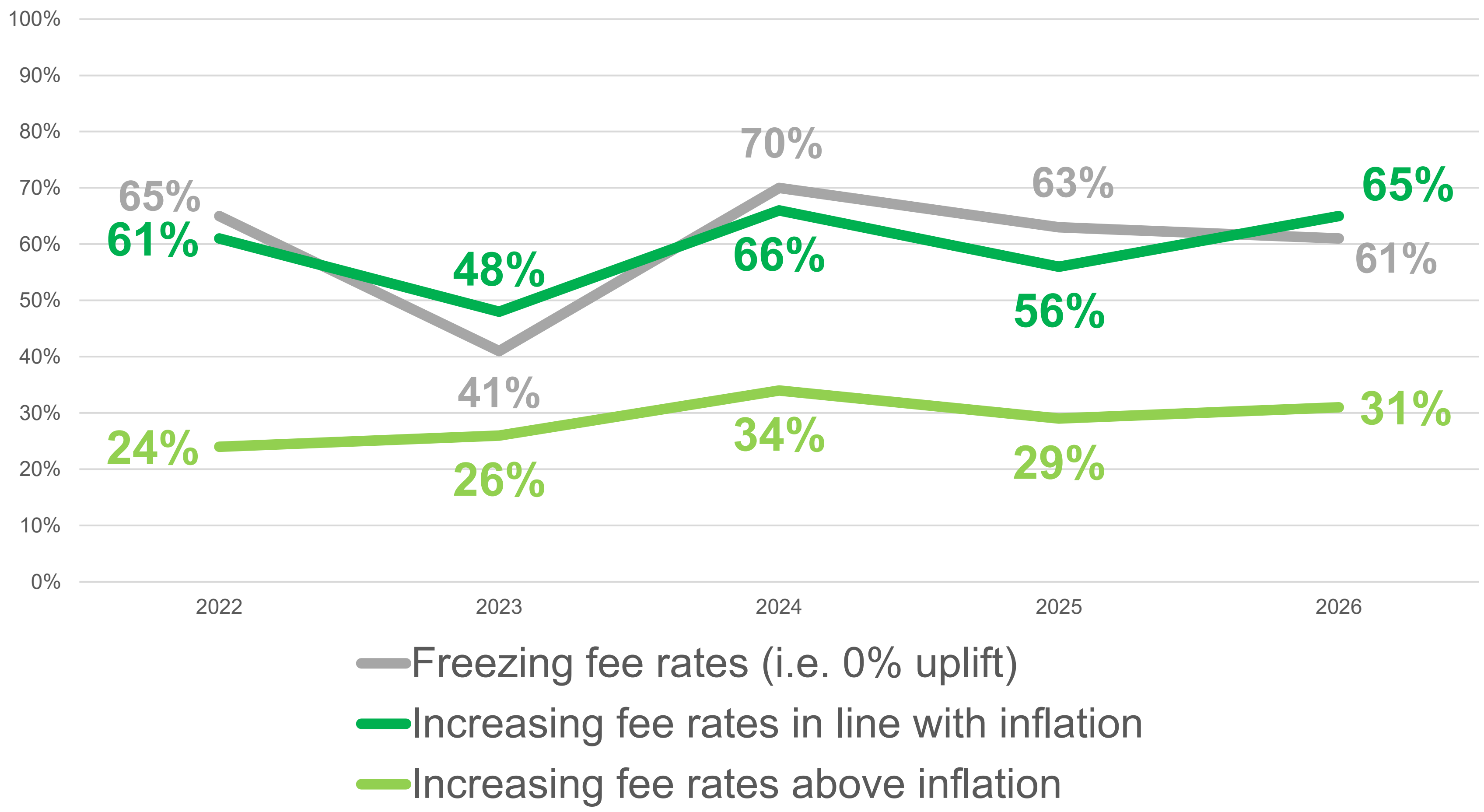
Your thoughts on the FPA and Employment Rights Act

- **Strong Support (in principle)**
  - Broad agreement with improving **pay, conditions, and status** of care workers
  - Recognition that **workforce investment = better care quality**
  - Many providers already delivering **good employment practices**
- **Major Concern: Lack of Funding**
  - Consistent message: **“Reform without funding will fail”**
  - Local authorities not expected to **meet increased costs**
  - Risk of **unfunded mandates** increasing financial strain
  - Potential for **fees not covering higher wage bills**
- **Financial & Operational Pressures**
  - Significant projected **cost increases** (wages, sickness, HR burden)
  - Risk to **financial sustainability** of providers
  - Concerns about **wage compression** and maintaining pay differentials
  - Added **administrative and reporting burdens**

Your thoughts on the FPA and Employment Rights Act

- **Market & Workforce Risks**
  - Could **reduce competitive advantage** for good employers
  - May **not solve recruitment challenges** unless pay rises are substantial
  - Concerns about impact on **manager recruitment and retention**
  - Risk of **unintended consequences** (e.g. unionisation challenges, sector instability)
- **Implementation & System Challenges**
  - Uncertainty about **pay-setting mechanisms and governance**
  - Need for **alignment with local authority commissioning and uplifts**
  - Risk of **uneven application** (regulated vs unregulated services)
  - Perception of **limited sector understanding in policy design**
- **Key Message from Providers**
  - "We support better pay—but **it must be fully funded, sustainable, and aligned with commissioning**."

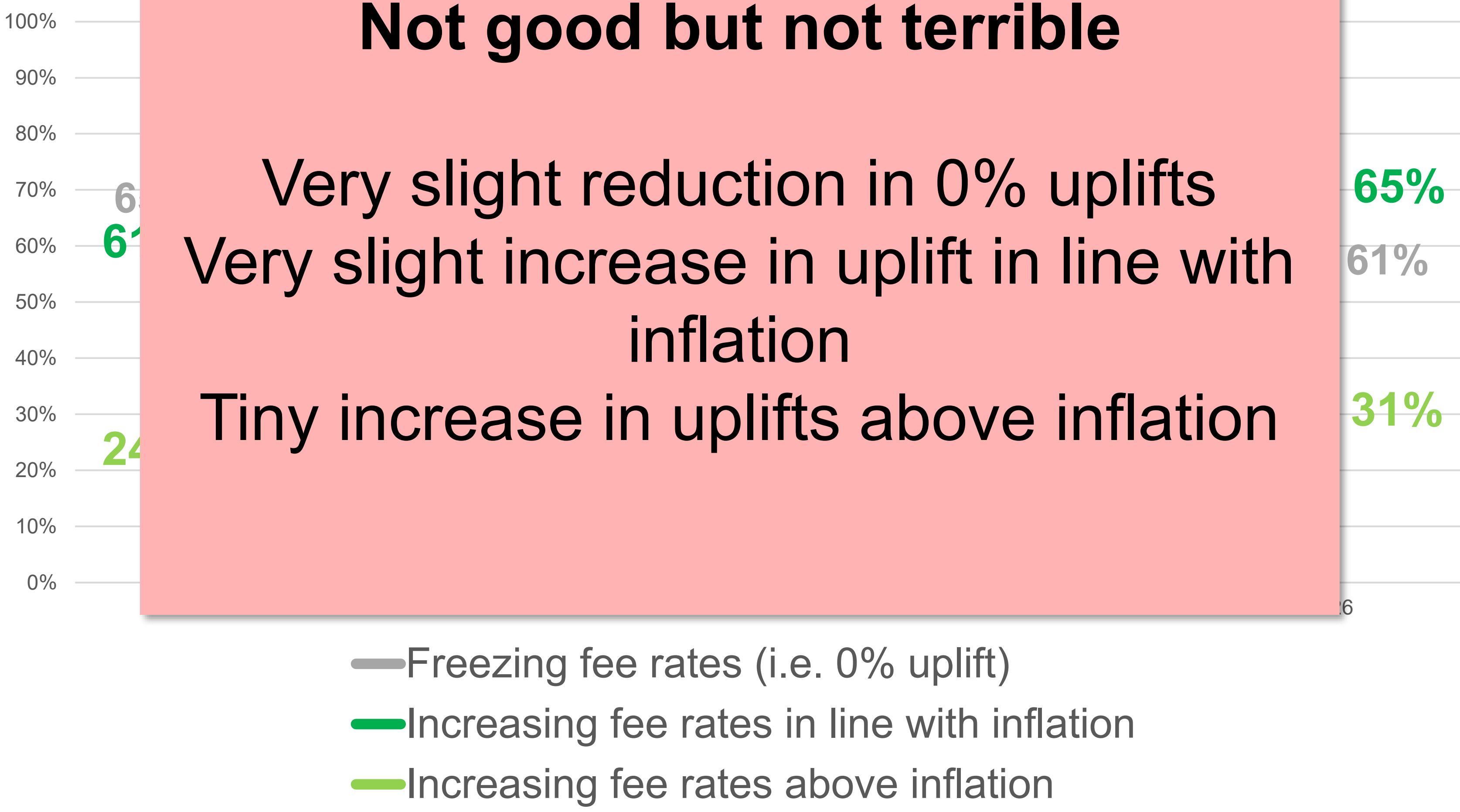
Funding settlements 2026



Fund

Not good but not terrible

Very slight reduction in 0% uplifts
Very slight increase in uplift in line with inflation
Tiny increase in uplifts above inflation



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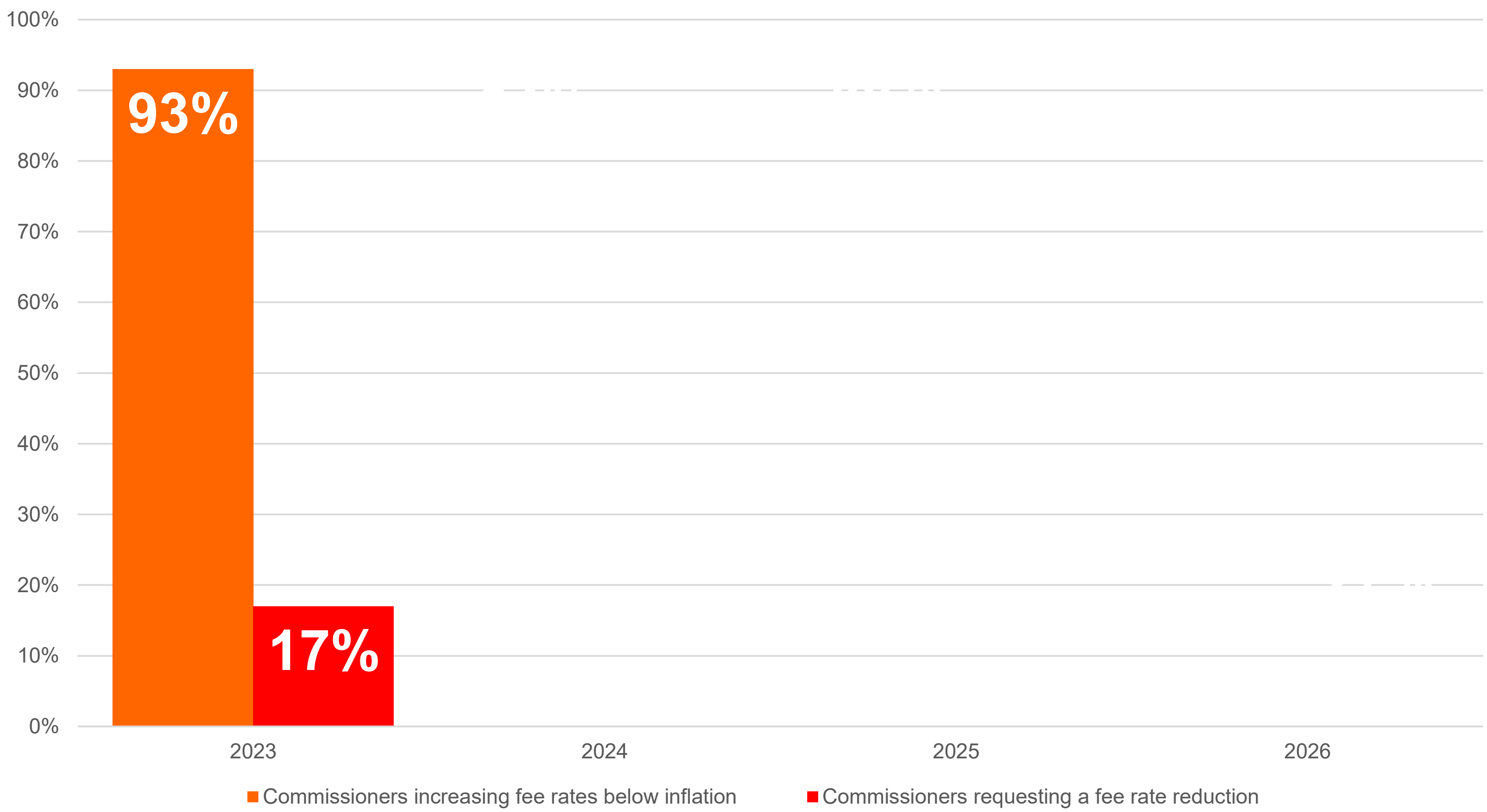
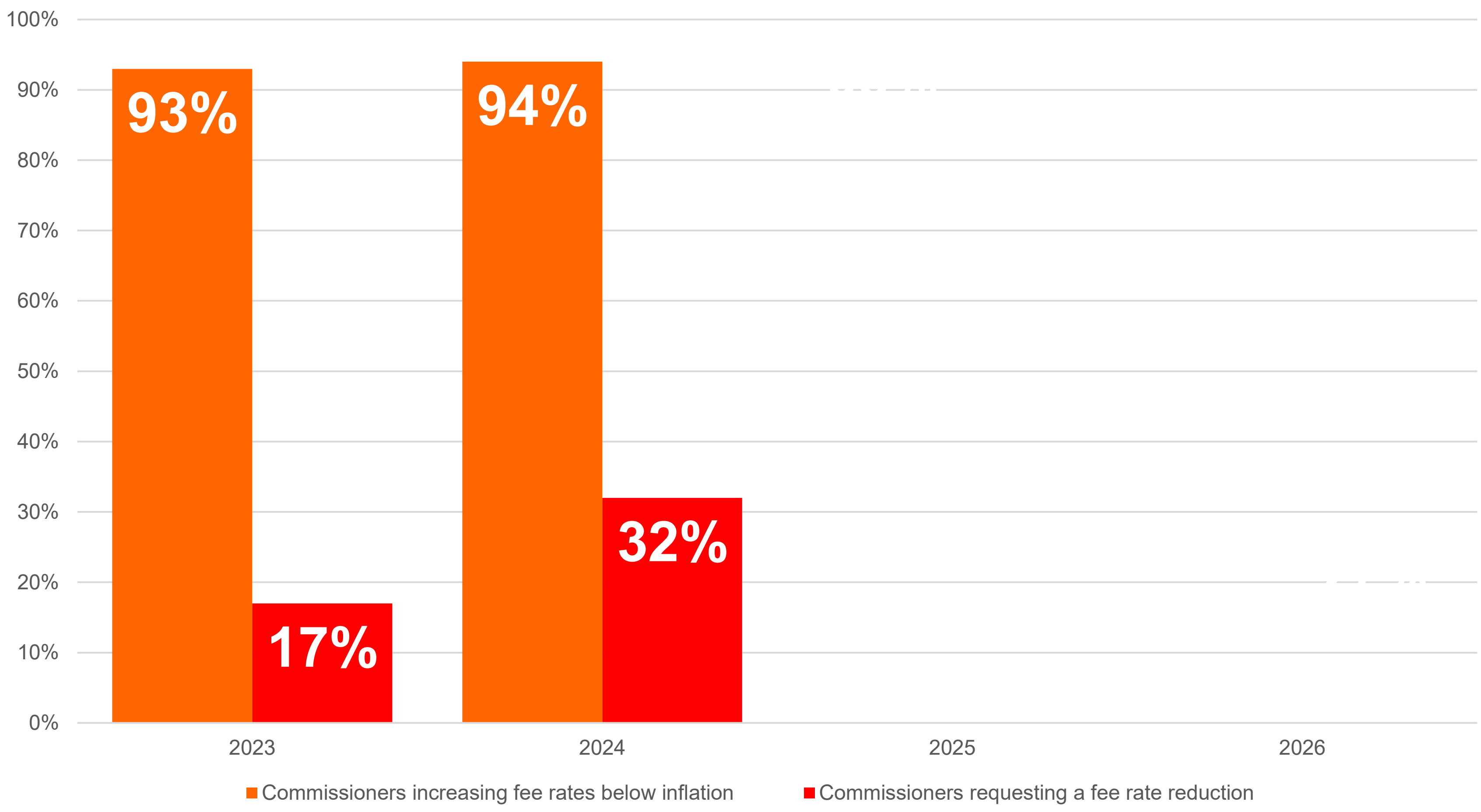


Funding settlements 2026



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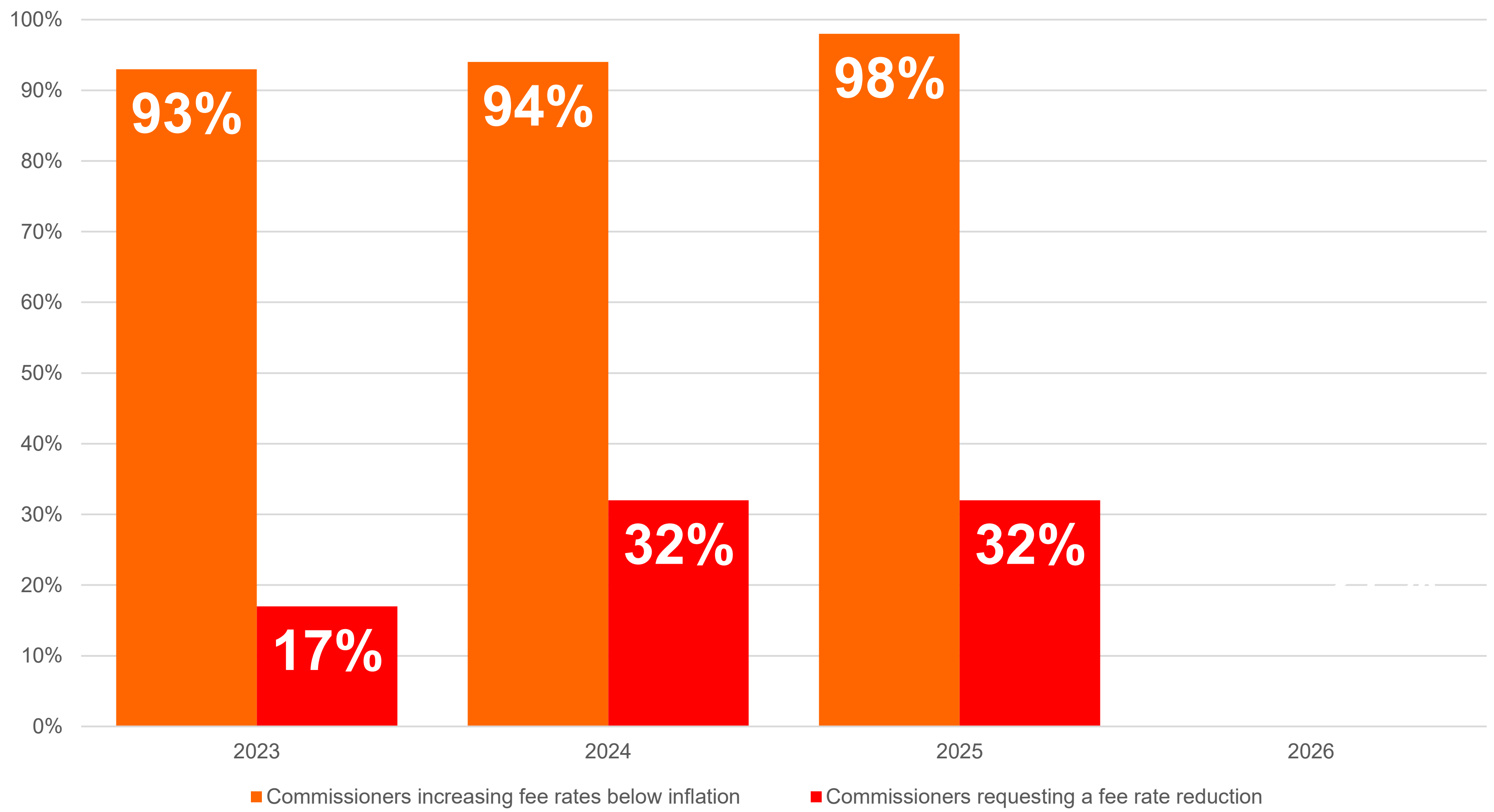

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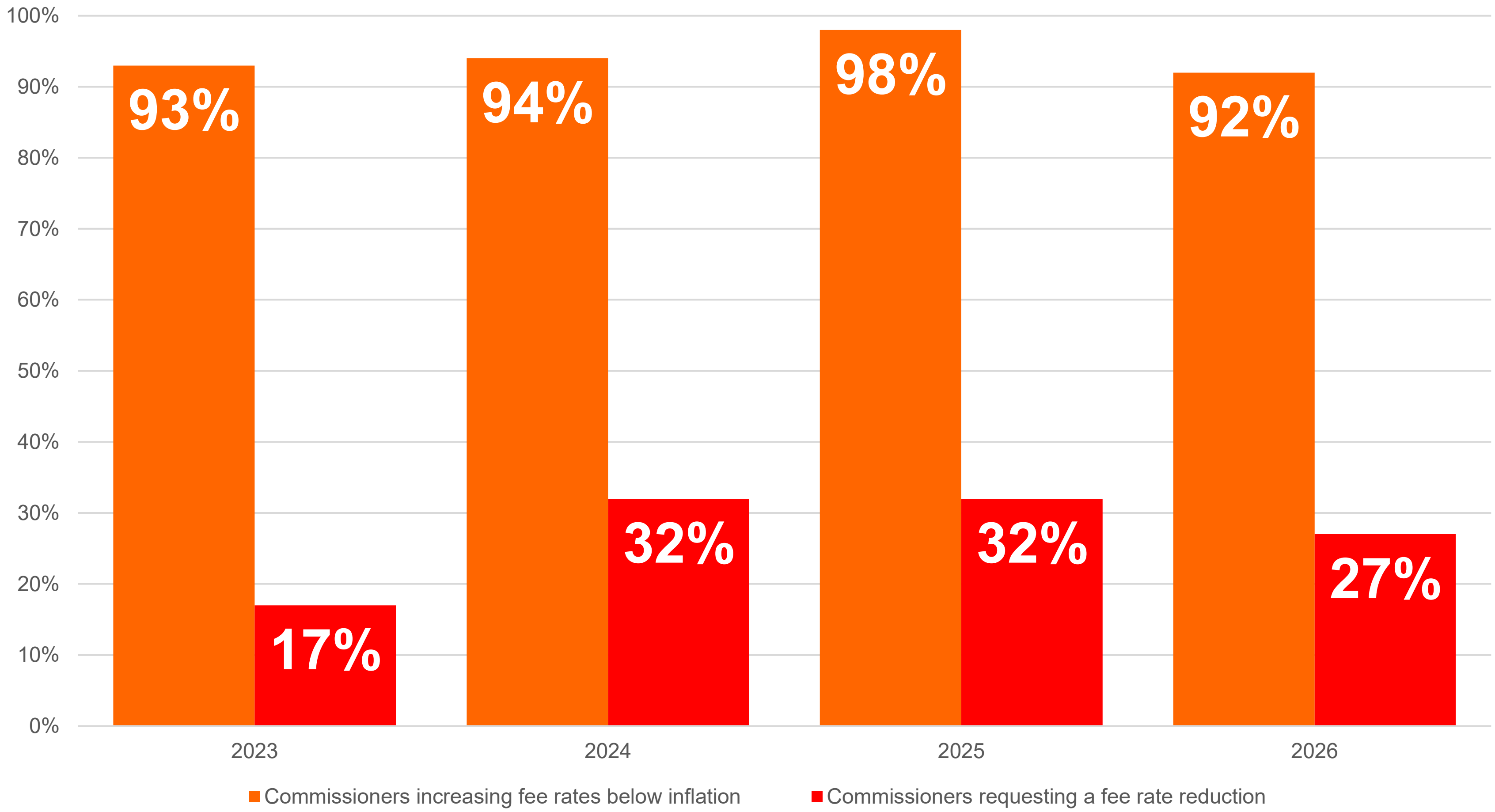

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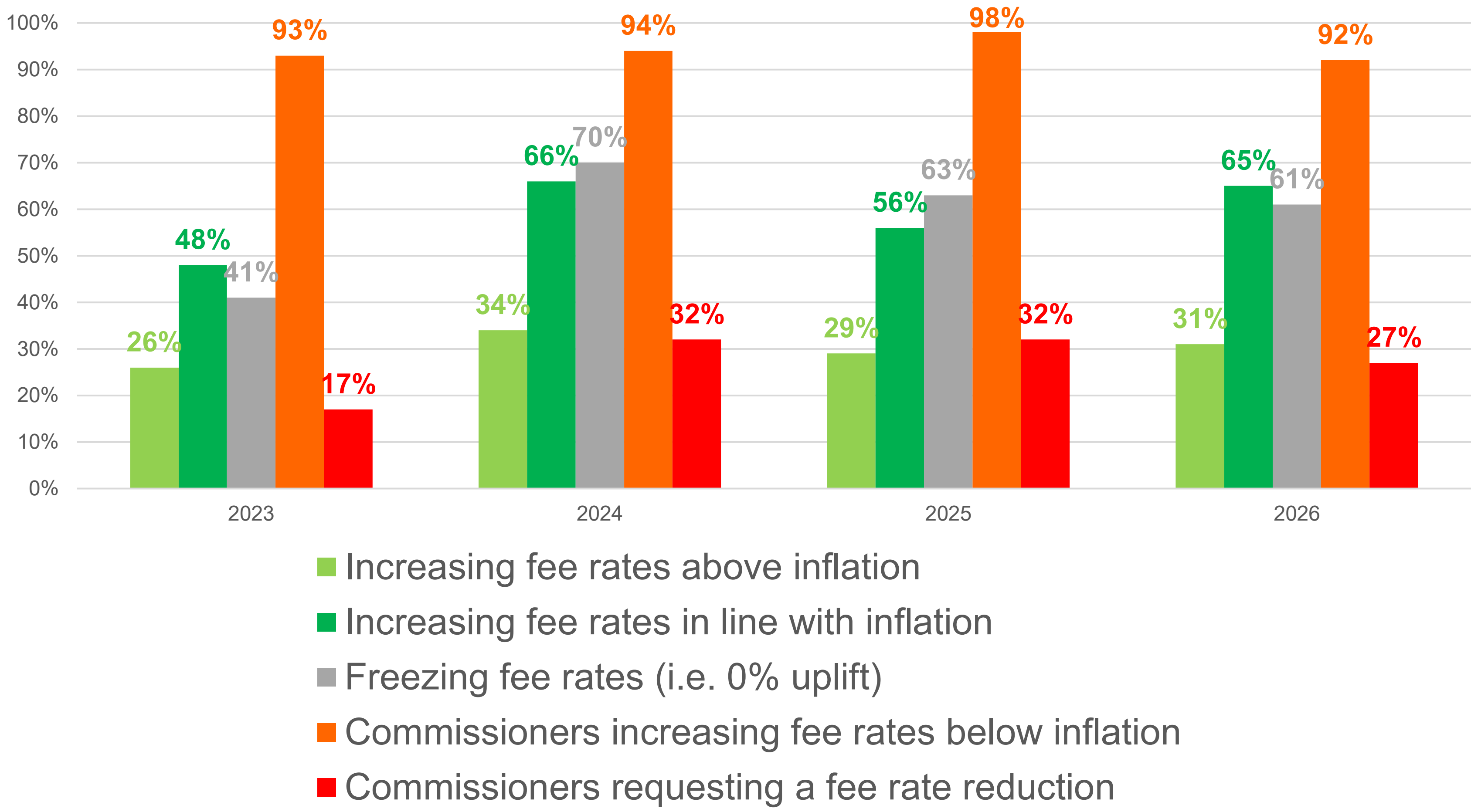


Funding settlements 2026

- Not worse, but not much better, consistently poor over the last four years
- 43% of you report being asked by commissioners to fund short falls in funding through use of reserves, fundraising or other means negotiated outside fees

Hidden Expectation

- Statutory commissioners are not always explicitly asking providers to cover funding shortfalls - **but expectations and behaviors strongly imply it.**
- What you have told us
  - Implicit expectation to supplement statutory funding through other income sources
  - Assumption that you can reduce central/overhead costs further
  - Below-inflation fee uplifts year-on-year creating structural deficits
  - Cross-subsidisation from private fee payers to cover public shortfalls
  - Signals raised indirectly during fee negotiations or challenges
  - No explicit directive, but a consistent pattern of underfunding

Funding settlements 2026

- Not worse, but not better, consistently poor over the last four years
- 43% of you report being asked by commissioners to fund short falls in funding through use of reserves, fundraising or other means negotiated outside fees
- Providers are effectively being asked to bridge funding gaps without acknowledgement
- Financial pressure is shifted onto providers
- Creates long-term risk to service viability and equity

CQC Reset – What's Happened So Far

- **Trigger for Change**: Dash Review (2024) identified:
  - Backlogs in inspections and registrations
  - Problems with Single Assessment Framework (SAF) and IT systems
  - Declining provider confidence
- **System Response:** Commitment to a major CQC "reset"
  - Increased DHSC and Parliamentary scrutiny
  - Initial operational recovery work (inspections, registrations, systems)
- **Leadership Changes:** Leadership instability through 2024–26

  – Dr Arun Chopra appointed Interim CEO (2026)

  – Sir Mike Richards stepping down as Chair (2026)
- **Operational Recovery (2025–26)**

  – Inspection activity increasing

  – Changes to registration processes to reduce delays

  – Shift toward more risk-based, intelligence-led inspections

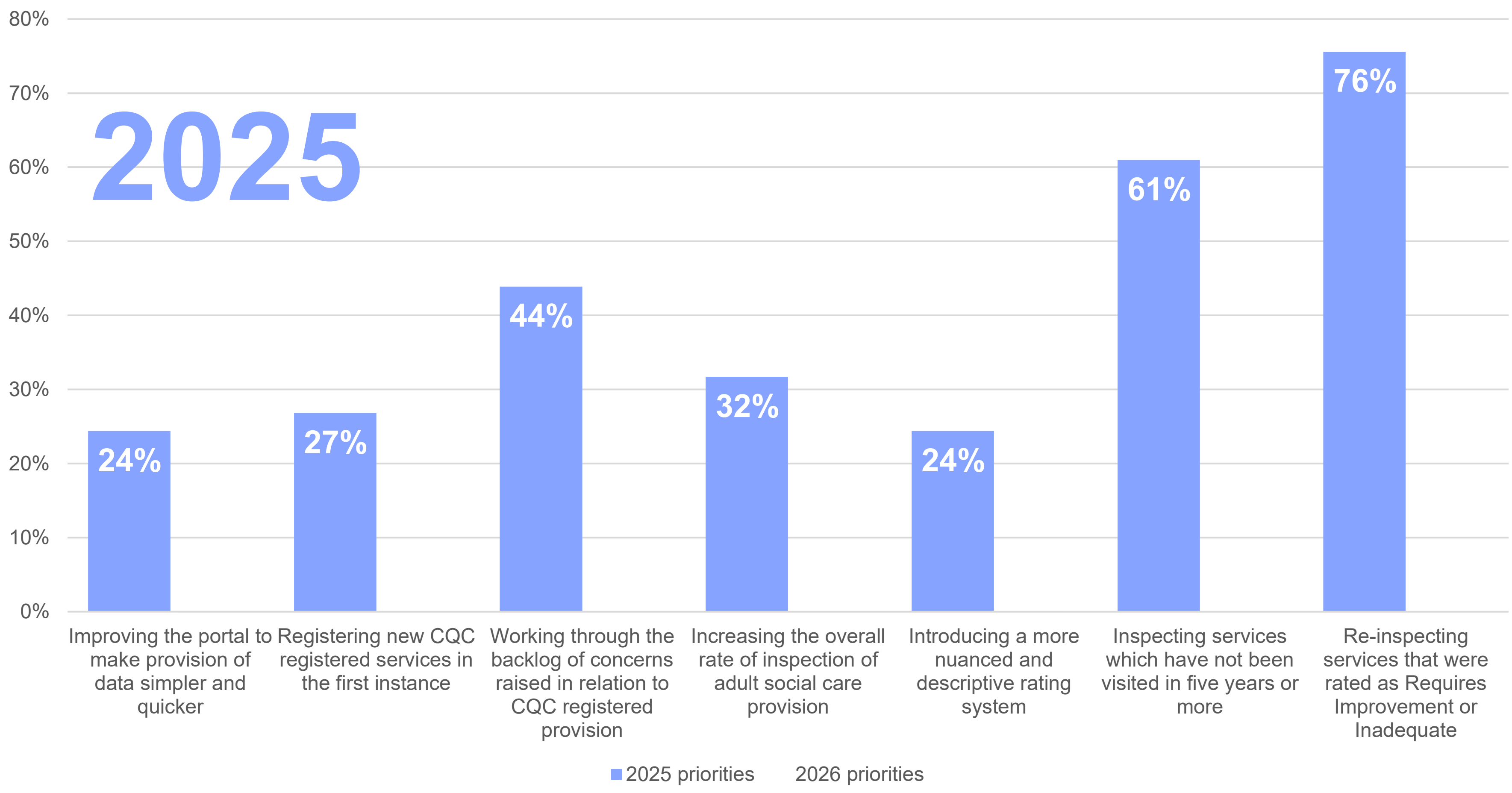
CQC Reset – a lot still to do

- **What they are doing now**
  - Move toward sector-specific assessment frameworks (replacing single model)
  - Draft frameworks out for consultation and testing (to June 2026)
  - Proposal to simplify ratings approach, including removing scoring
  - Continued focus on:
  - Increasing inspection volume and consistency
  - Streamlining systems and processes
  - Introduction of "Returning to Good and Outstanding" inspections
- **What's Still to Do**
  - Finalise and implement new assessment frameworks
  - Resolve IT and data system issues
  - Fully stabilise inspection regime
  - Rebuild provider trust and credibility
  - Appoint permanent CEO and Chair

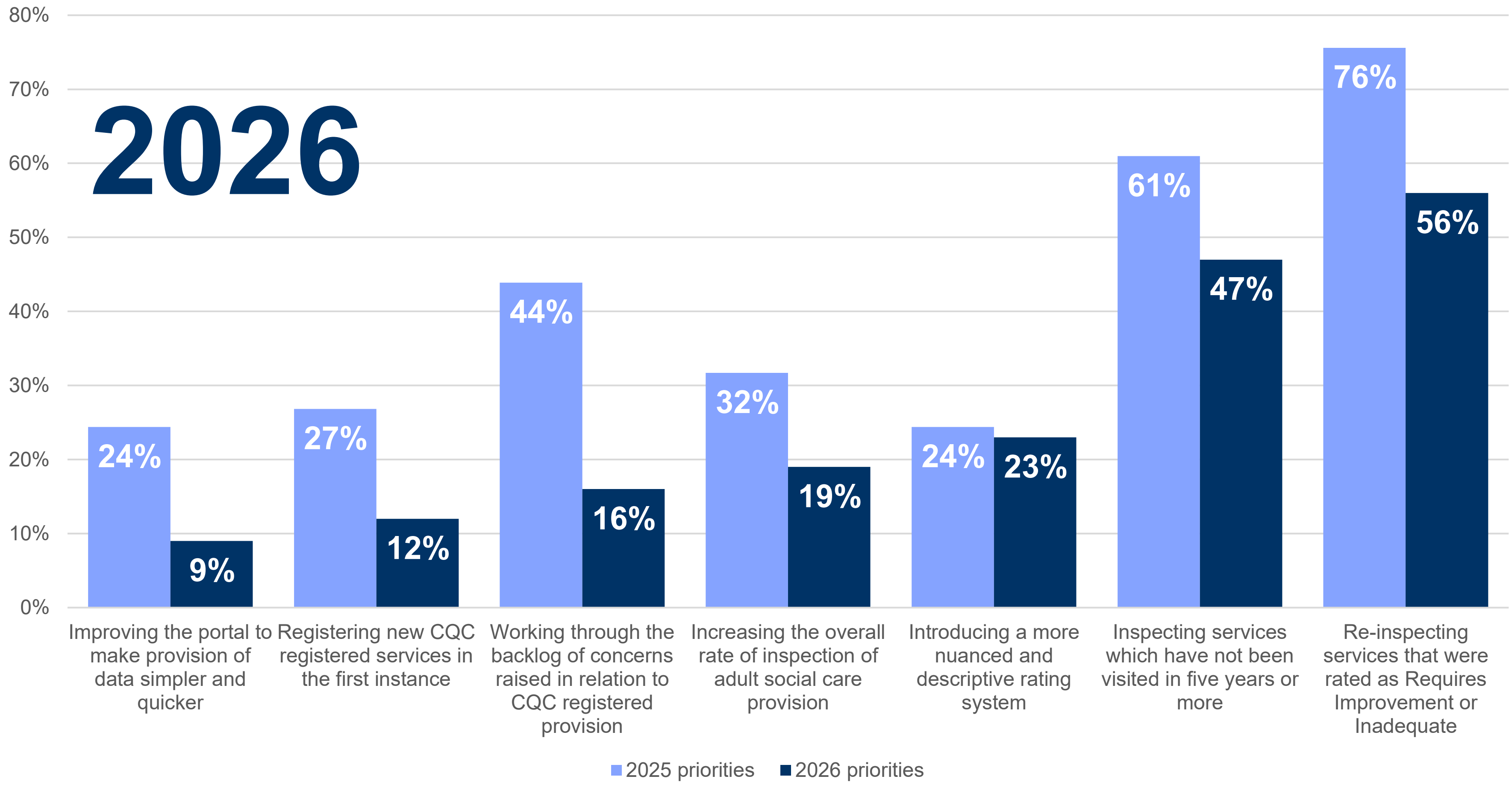
CQC

- We asked you what you thought the priorities should be for CQC going forward.

What CQC should focus on



What CQC should focus on



Your thoughts on CQC

- **Inconsistent & subjective inspections**
  - Variation in inspector approach, interpretation, and outcomes
  - Decisions perceived as opinion-based rather than evidence-based
  - Lack of transparency in ratings, appeals, and factual accuracy processes
- **Inspector capability & conduct**
  - Concerns about inspectors lacking sector experience
  - Reports of poor behaviour (e.g. overly adversarial, dismissive)
  - Positive experiences noted where inspectors were supportive and constructive
- **Overemphasis on paperwork**
  - Excessive focus on documentation over quality of care
  - Contradictory demands (digital vs paper records)
  - Desire for more person-centred, on-the-ground inspections
- **Process inefficiencies & delays**
  - Long gaps between inspections (some >4–5 years)
  - Delays in reinspection affecting service viability
  - Lengthy, unclear, and difficult-to-use systems (e.g. portal)
- **Lack of clarity & communication**
  - Expectations not clearly communicated
  - Difficulty engaging with CQC
  - Limited response to provider feedback or complaints

V O D G
Voluntary Organisations Disability Group

Your thoughts on CQC

- **Inconsistent & subjective inspections**
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- **Lack of clar**
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  - Difficulty engaging with CQC
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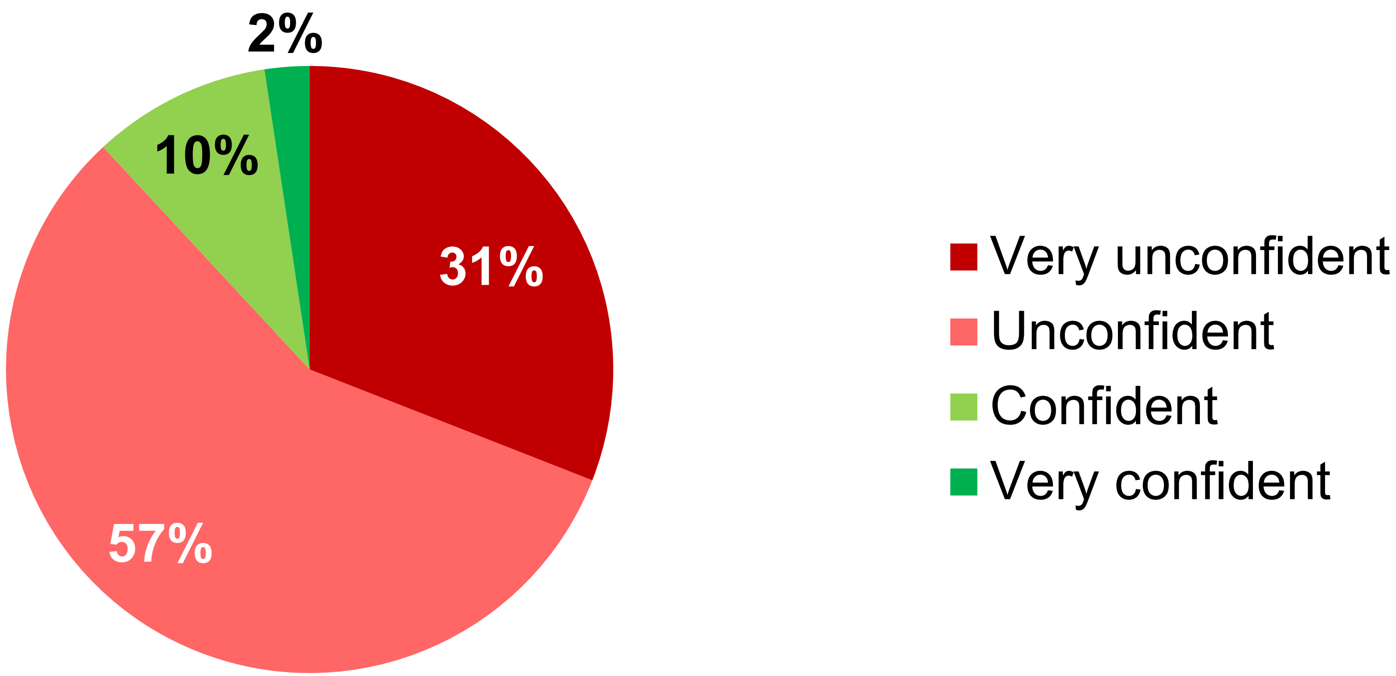
You are not happy with how CQC inspectors behave and how the organisation responds to your concerns.

Feels as if the moment of openness and engagement may be passing but its to early to tell

Casey Commission

How confident are you that the Casey Commission will deliver an outcome which makes a significant improvement to the delivery of adult social care?

2025



Casey Commission

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202

Sadly, your confidence in the Casy Commission to make a difference is slightly on the wain. We should not have to wait too long to judge this more accurately

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The Casey Commission

- You seem to fall into three main camps:
- Camp one has had no direct contact with Commission and has some doubts about its focus and emphasis

‘I appreciate that this is an incredibly difficult review (no silver bullet), however when I listen and read what is being said so far, I hear so much about what is the problem (that we have heard for years) without solutions’

‘The main issue is funding and unless significant additional funding is available the sector is heading for crisis’

The Casey Commission is a tool to create an excuse for the Labour government to do nothing during this parliament.

The Casey Commission

- You seem to fall into three main camps:
- Camp one has had no direct contact with Commission and has some doubts about its focus and emphasis
- Camp two has had direct contact but is concerned that the Commission has a confused agenda and is taking too long to get to a point where anything substantial could happen

‘I have engaged and shared our experience but the political will to adopt recommendations is unlikely to be there - evidenced by the lack of implementation on previous reviews and recommendations’.

‘Seems to be little coming out yet, apart from recent Casey speech where she confirmed social care is broken’

‘I was dubious and pessimistic until I heard Louise Casey's recent speech, but time will tell and it's hard to see there being political or public will to invest properly in social care when there are so many other pressing needs for public service investment’

The Casey Commission

- You seem to fall into three main camps:
- Camp one has had no direct contact with Commission and has some doubts about its focus and emphasis
- Camp two has had direct contact but is concerned that the Commission has a confused agenda and is taking too long to get to a point where anything substantial could happen
- Camp three has had direct contact and possibly more in-depth contact and has more confidence in what the commission is doing but this is still strongly qualified

Somewhat positive in that they appear to be listening. I like the separation of working age adults from older people. I'm doubtful that they have the power to really change anything significant and any potential recession will likely erode their powers further.

Engaged with commission, was not sure there was any genuine listening going on or that there was a genuine desire to listen to providers issues. Came with set questions that seemed to be designed to illicit preconceived answers

*Casey Commission Team visited for a whole day, have met with myself and colleagues, open to and received submissions. - **My reservation is will there be the political will to invest in and make the significant improvements required. Local May elections likely to be damaging to the government and the first set of recommendations from Casey will land in that context followed by the final set of recommendations from Casey to follow in the lead up to the next General Election.***

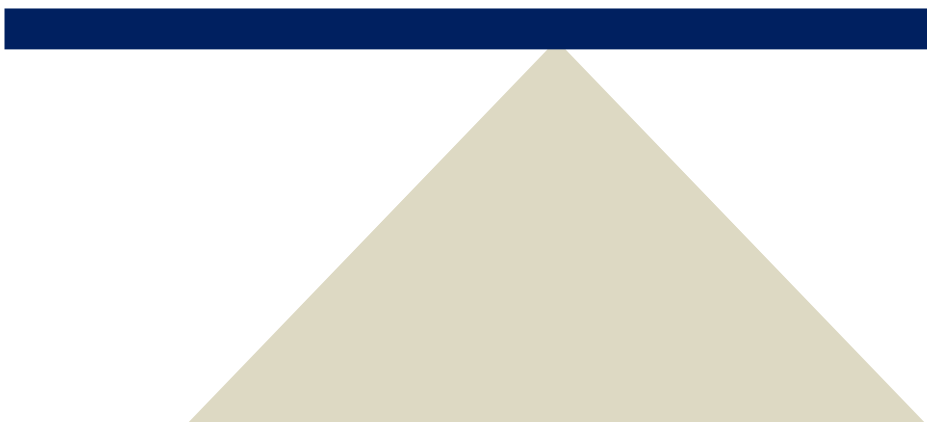
The Casey Commission

- You seem to fall into three main camps:
- Camp one has had no direct contact with Commission and has some doubts about its focus and emphasis
- Camp two has had direct contact but is concerned that the Commission has a confused agenda and is taking too long to get to a point where anything substantial could happen
- Camp three has had direct contact and possibly more in-depth contact and has more confidence in what the commission is doing but this is still strongly qualified
- Casy's speech to the Nuffield Foundation has provided some assurance that the situation is understood a bit better than was first thought but it has not 'moved things on'

Confidence in the next 12 months

Confident/ Very Confident

Cordis Bright Corporate Confidence Seesawometer®

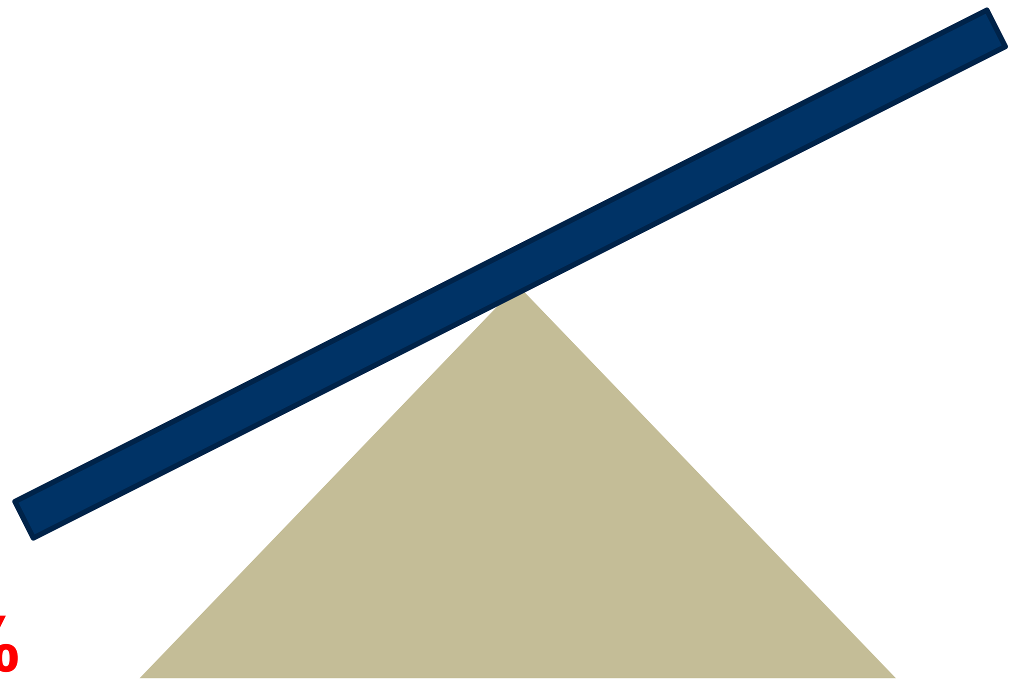


Very Unconfident/ Unconfident

2018

82%

Confident/ Very Confident



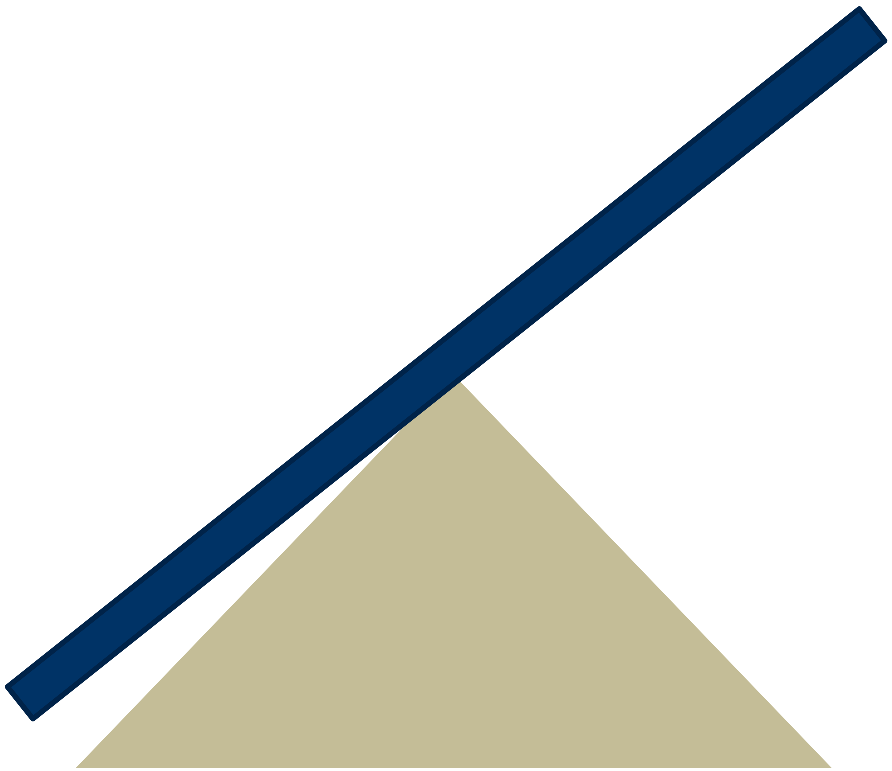
18%

Very Unconfident/ Unconfident

2019

90%

Confident/ Very Confident



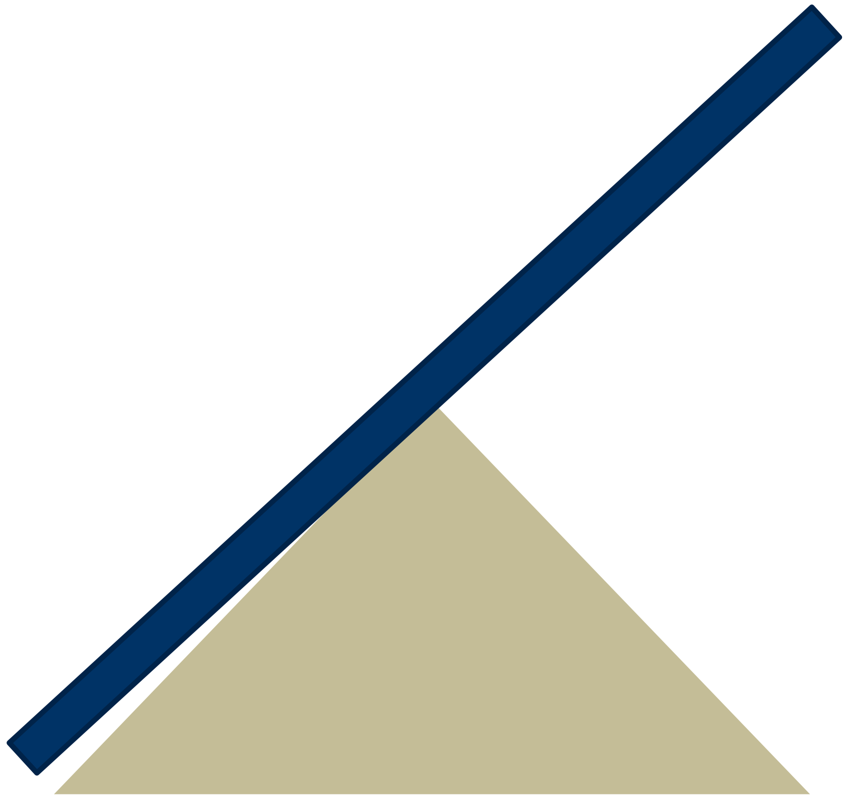
10%

Very Unconfident/ Unconfident

2020

Confident/ Very Confident

94%



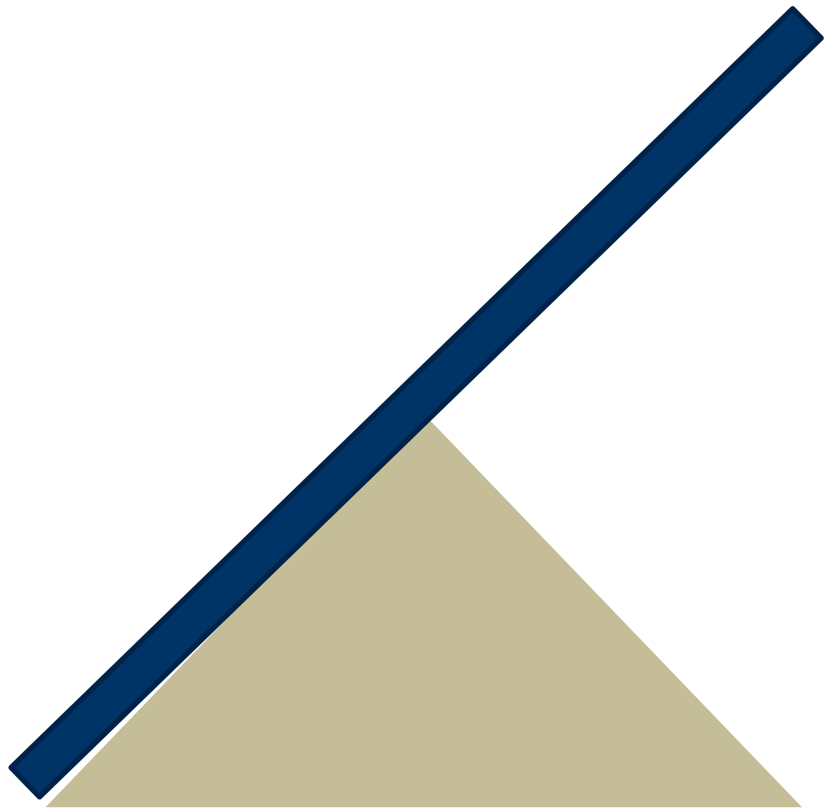
6%

Very Unconfident/ Unconfident

2021

Confident/ Very Confident

96%



4%

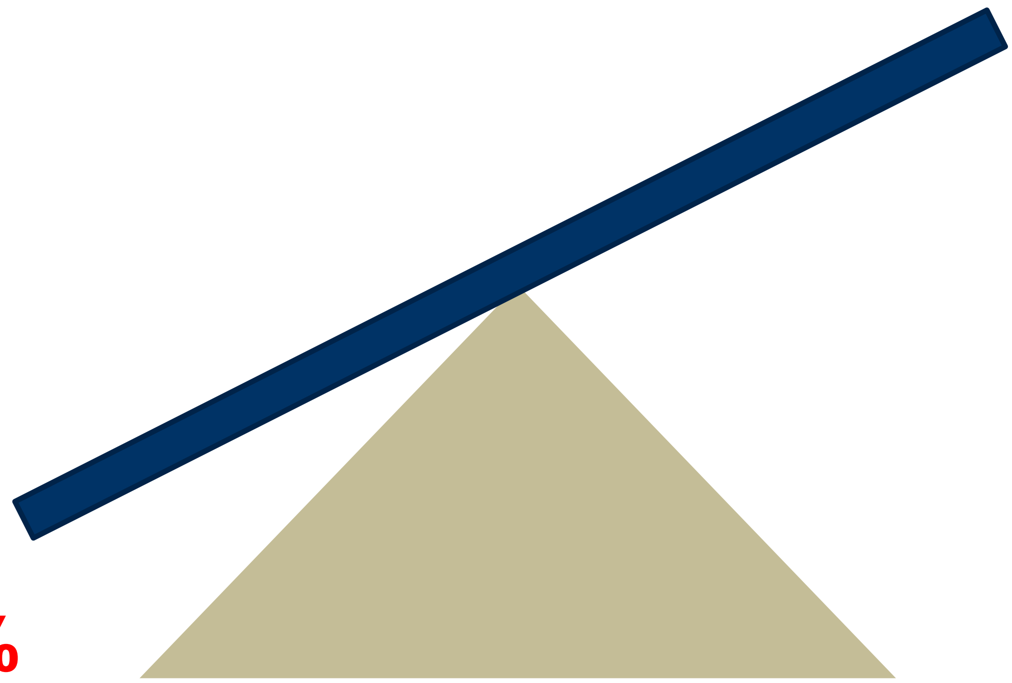
Very Unconfident/ Unconfident

VODG
Voluntary Organisations Disability Group

2022

83%

Confident/ Very Confident



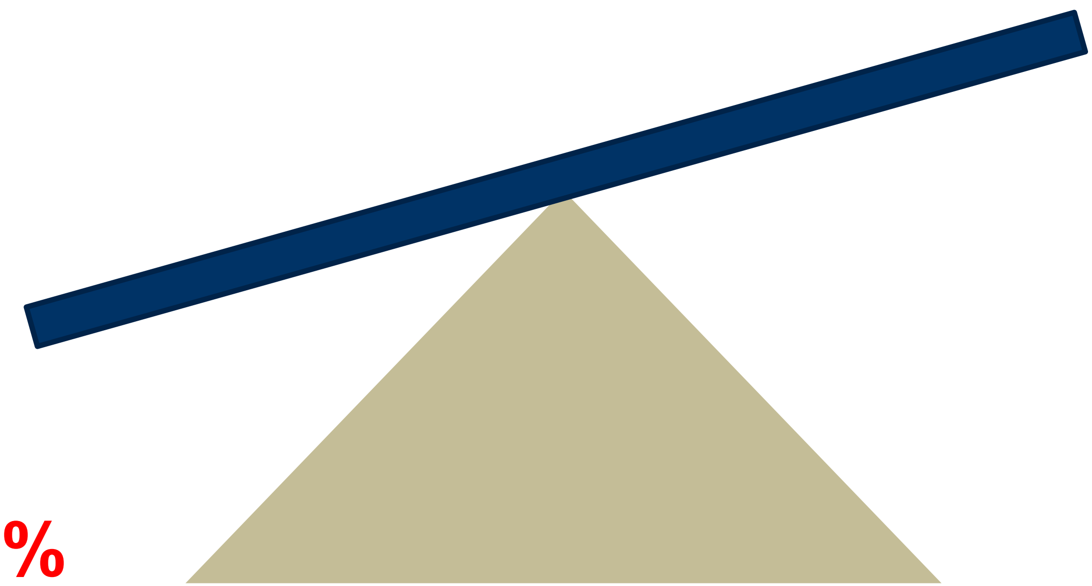
17%

Very Unconfident/ Unconfident

2023

70%

Confident/ Very Confident



30%

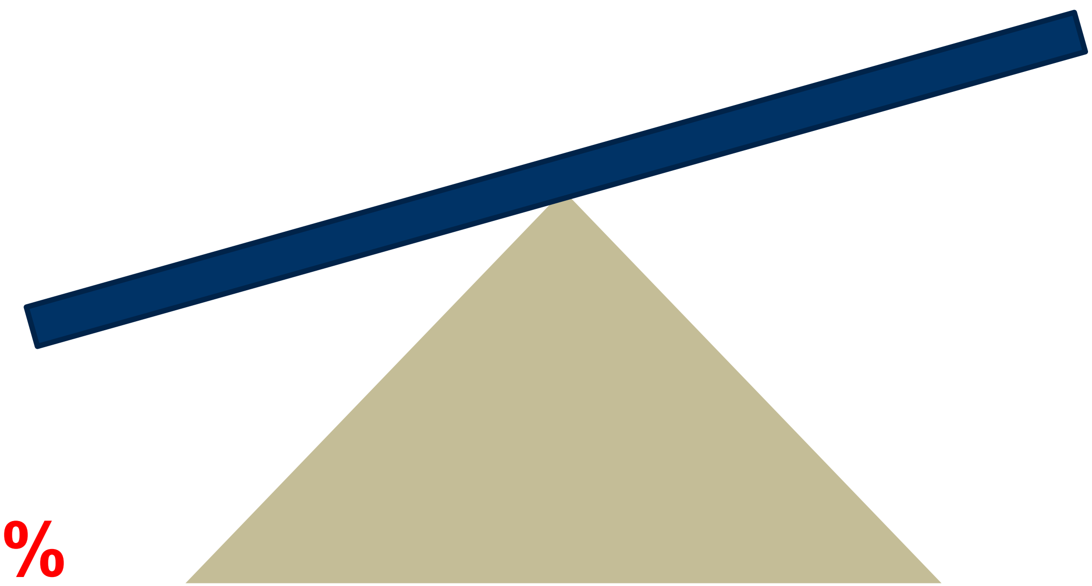
Very Unconfident/ Unconfident

VODG
Voluntary Organisations Disability Group

2024

70%

Confident/ Very Confident



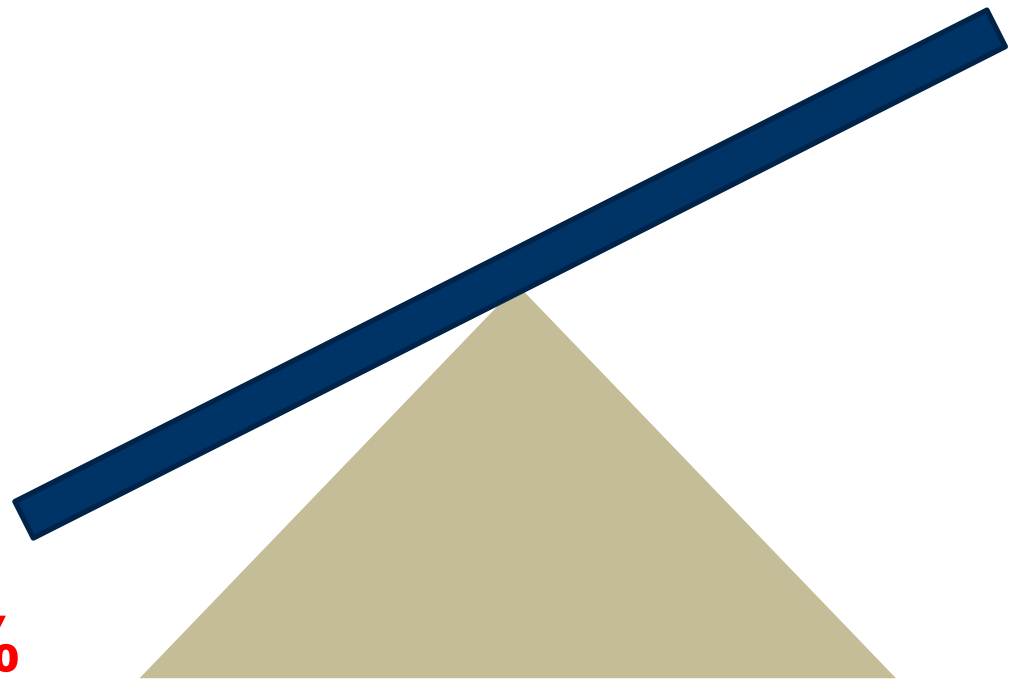
30%

Very Unconfident/ Unconfident

2025

81%

Confident/ Very Confident



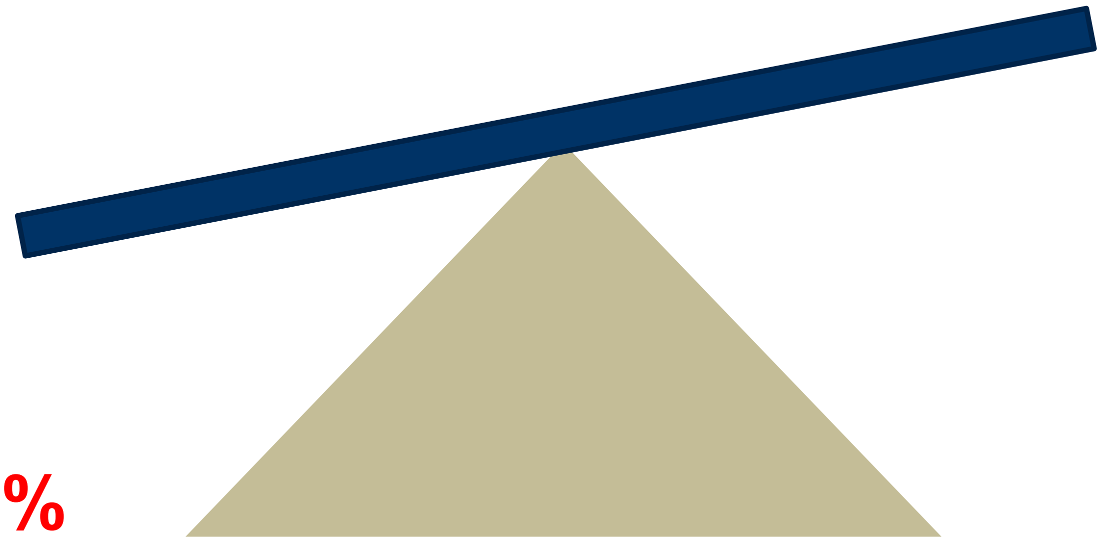
19%

Very Unconfident/ Unconfident

2026

69%

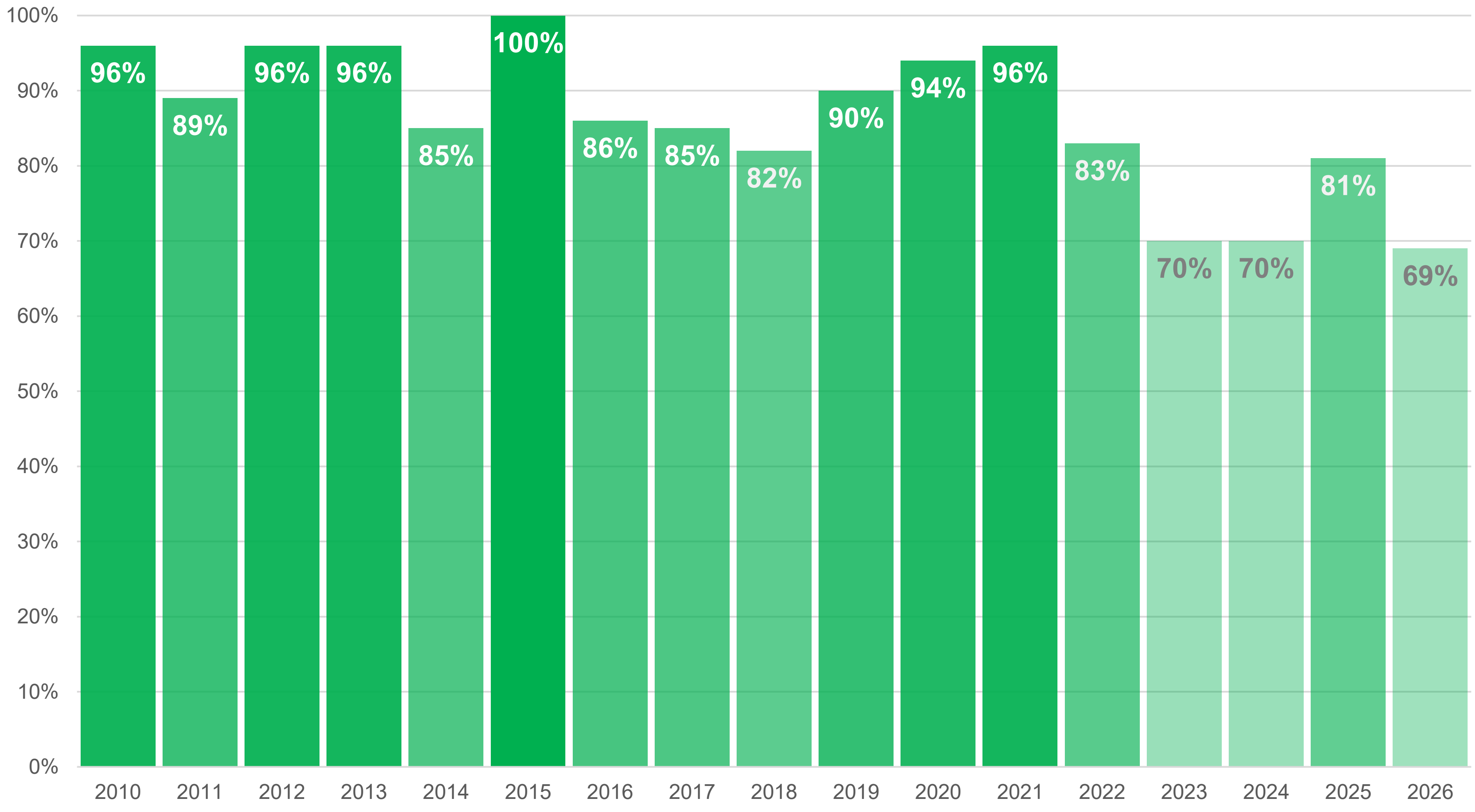
Confident/ Very Confident



31%

Very Unconfident/ Unconfident

Confidence over the years



Some thoughts

- This is a strange and it would appear unsettling time
- By the end of today we will have a better idea of the scale and full nature of the political shifts which are occurring
- We will not know what these mean or how they will impact
- By the time of the next general election:
  - The FPA will be operating but none of you believe it will be adequately funded.
  - The Casey Commission may well have delivered its second report
  - Local Government re-organisation will have just completed and added another 30+ social service authorities
  - The completed NHS re-organisation will be about a year old
- In the interim we will be learning more about how Reform and the Greens govern

Some thoughts

- None of what is currently happening provides clarity or certainty
- So, what can you do?
- Become clearer about what you need and what you want, and decide how far you are willing to go to get it
- Think very carefully about scale of turnover vs profitability
- Use the advantages you have:
  - You can make decisions really quickly
  - You can take very decisive action without having to go through complex processes
  - You don't need to pay shareholders
  - You can choose to work collaboratively with each other
  - You can be good employers not just in terms of your pay but because you actually believe that treating our employees fairly is the right thing to do.
- Make stronger, more consistent common cause with the people who use your services and their families.

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