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Largest national providers of private and voluntary social care (March 2021)

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Main findings

- The private sector has continued to increase its investment in children's homes and fostering services.
- The largest private owners of children's homes (21) have continued to grow. These providers now have a larger number of homes and offer a larger number of places through these homes.
- The top 10 companies accounted for 33% of all private children's homes.
- The largest company, Certitudo Holdings PLC, accounted for more than 10% of all private children's homes.
- The top 10 providers operated homes with between 46% and 58% of all private children's homes. These same companies accounted for 45% of all places in the private sector.
- But one in 4 private children's homes (23%) or 12% of places was a single provider that is not the ownership of a larger company.
- Among privately owned independent fostering agencies (IFAs), 3 in 5 were single providers. Single providers of IFAs operated fewer places than single providers of children's homes, at an average of 16 places.
- Among the 10 privately owned IFAs that were within a company ownership chain, the top 10 companies accounted for 75% of all private IFAs and operated more places, that offer more than 1,000 places through the IFAs they own.
- The top 10 companies accounted for 61% of all private IFA places in England as at 31 March 2021, with the largest provider at 12%.
- The largest provider of IFA places, Axis Outcomes First Group (OOFG) Ltd, provided 6,275 places. This is 10% of all IFA places provided by the private sector.
- There are 8 companies that appear on the list of largest providers for both children's homes and IFAs. These companies are: Certitudo Holdings PLC, the Outcomes First Group, Children's Care Plc, Nurture UK Taken Ltd (Priority), and Compass Community Ltd.

Introduction

This release provides information about the ownership of children's homes and IFAs in England, as at 31 March 2021. Children's homes and IFAs, run by the private and voluntary sector, are the most common types of children's social care providers in England.

According to the latest available Department for Education (DfE) data, there were over 60,000 children in care or voluntary sector provision in England, as at 31 March 2020. Of these children, around 28,000 were in private provision and around 7,500 in voluntary provision. The private sector provides services to children from organisations that provide the children's services function of the council, or from trusts.

The private sector then, accounted for the vast majority of the children, 28,000, or 79% of children in provision. This figure included around 17,000 children in 2,900 children's homes, as well as around 5,300 in semi-independent and independent fostering agencies (IFAs). The remaining 6,000 children in private provision placed in long-term residential or supported accommodation.

This release describes the picture of private and voluntary ownership across children's homes and IFAs, as at 31 March 2021. This includes information about the largest providers, which are the companies that own the largest number of children's homes, or provide the largest number of places through IFAs. The top 10 IFA providers, for just by the voluntary sector has declined by 12% from 160 to 141 homes. Local and health authority run homes grew 3% from 420 to 433 homes. Local authority owned homes grew by 5% from 1,000 to 1,050 homes.

This paper focuses on private ownership of children's homes, as at 31 March 2021. It is useful, though, to break down ownership by types of children home provided, as they are not a single group.

Secure children's homes

Secure children's homes were the smallest group, with 13 homes in England, offering a total of 220 places. Most secure children's homes operated by local authorities (12 out of 13), with the remaining home being voluntary.

Figure 1: Number of secure children's homes and places, by sector

Figure and its notes
Map not scale is avoiding

Residential special schools registered as children's homes

There were 93 residential special schools (RSS) registered as children's homes, providing a total of 1,750 places. The majority of these were under private organisations, owning 51 homes and providing 1,000 places. Local authorities operated 29 homes providing around 700 places (40%), and voluntary sector providers operated 13 homes offering a total of 80 places (5%).

Figure 2: Number of RSS registered as children's homes (2%) and places, by sector

Figure and its notes
Map not scale is avoiding

Short-break children's homes

These homes offer short periods of care for disabled children who usually live with their parents. There were 162 homes that provided care only for short breaks, offering a total of 1,300 places. Most short-break children's homes are run by private sector activities, with some being local authority activities, which offers a total of 152 homes (70%). Voluntary organisations ran 34 homes (21%) offering 220 places (17%), with the remaining 10 homes (6%) run by the private sector (90 places, 7%).

Figure 3: Number of short-break only children's homes and places, by sector

Figure and its notes
Map not scale is avoiding

These homes are a distinct service. As a result, the number of children homes varied by local authorities and voluntary organisations is even smaller than the private sector.

Children's homes

The remaining 2,862 children's homes were the largest group of homes (91% of all types of homes). These offered the largest number of residential places (16,700 places, 78% of all places). Within this group, different homes specialise in meeting different needs of children, such as those with learning disabilities, those with mental health needs, those who are vulnerable, those who are sexually exploited (for example, working with those who have been trafficked), those who are pregnant, or those who are parents. Children's homes typically provide group care but care could be provided to one child.

There than 4 in 5 of these homes were owned by private companies (2,328 homes, 81%), which accounts for 7,050 places (78%). 270 homes (9%) were owned by voluntary organisations, providing 2,350 places (14%), and 264 (9%) were owned by voluntary organisations (1,300 places, 7%).

Figure 4: Number of children's homes and places, by sector

Figure and its notes
Map not scale is avoiding

For the rest of this release, analysis will include only the 2,862 children's homes. This includes the private and voluntary sector, local authority and health run children's homes. This maintains comparability between sectors. Figure 5 shows the number of children's homes and places, by sector, as at 31 March 2020 and 31 March 2021. Overall rise in the private sector, from 2,328 to 2,362 homes, and the voluntary sector declined from 600 to 574 homes and the LA sector grew somewhat from 1,050 to 1,080 homes.

Figure 5: Comparison of the sector breakdown of children's homes as at 31 March 2020 and 31 March 2021

Ownership of private children's homes

There is a wide range of ownership among children's homes. Some homes are single providers, with a single provider owning a single children's home. Others are part of a wider chain of a company's ownership chain. Some of these companies own a few homes but some are considerably larger number.

As at 31 March 2021, there were a total of 2,362 private companies owning multiple homes. The majority of these (2,198 companies, 79%) owned 2 or fewer homes each. The remaining 164 companies owned 3 or more homes, but they accounted for a wide variation in the number of homes that companies own, we have grouped the largest providers separately. We looked at how homes owned by these companies differ from the rest of the sector.

We find that, solo and small companies (fewer than 3 homes) are more likely to be single providers, and this is true for the remaining 1,5 there was no data available on Companies House.

Of these 2,010 privately owned children's homes, as at 31 March 2021:

- 23% (21) were single providers
- 1,198 (59%) were owned or part of a wider top company with at least 3 homes
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Figure 6: Number of children's homes and places, by ownership

Overall, the top 10 companies accounted for 33% of all private children's homes. Although, the largest - Certitude - alone accounted for around 10% of all private children's homes.

Table 1: The 10 largest providers of private children's homes as at 31 March 2021, compared with 31 March 2020

Position	Position change	Top company	Number of children's homes	Net change in homes	Number of places	Net change in places
1	Unchanged	Certitude Holdings PLC	198	+42	1,275	+243
2	Positive (unchanged)	Nova Group (inc3 Esports Healthcare Private Limited)	108	+6	840	+33
3	Unchanged	The Outcomes First Group (OOFG) and subsidiary	67	+12	370	+70
4	Decreased (unchanged)	Nurture Care Taken Ltd (Priority)	58	0	350	20
5	Positive (unchanged)	Children's Care Plc	57	+3	350	+20
6	Positive (unchanged)	Vertitude Care Ltd (VCL Team)	47	+10	330	+20
7	Positive (unchanged)	Stewart Care Services Ltd (SCS Group Ltd)	43	+6	255	+30
8	Positive (unchanged)	The Partnership of Care Today (Partnership of Care Ltd)	39	+5	225	+20
9	Positive (unchanged)	Care Homes Plc	34	+3	205	+20
10	Increased (unchanged)	Methodist Phoenix Ltd	34	+3	205	+30

The largest providers have continued to grow both in terms of the number of homes owned and places provided. Only 1 of the top 10 has experienced a reduction in size since the previous year - The Priory Group (Partnership in Care Ltd).

The company Methodist Phoenix Ltd (Methodist) joined the list of the 10 largest providers, with 34 homes and 205 places, as at 31 March 2021. Methodist replaced The Brow Trust Ltd, which dropped to the 14th largest company, with 24 homes and home itself. The rest companies ranked 11-21, in terms of the number of children's homes, are shown in Table 2 below.

Table 2: Next 11 largest providers of private children's homes as at 31 March 2020, compared with 31 March 2020

Position	Position change	Top company	Number of children's homes	Net change in homes	Number of places	Net change in places
11	Decreased (unchanged)	Working Brands Ltd (Working Brands Ltd)	26	+1	170	0
12	Decreased (unchanged)	Anchor Care Ltd	25	+1	150	0
13	Increased (unchanged)	Compass Community	24	+3	135	+20
14	Decreased (unchanged)	Theodore Care Limited (Theodore Ltd)	23	+3	75	+10
15	Positive (unchanged)	Reflexion Care Group	19	0	50	0
16	Increased (unchanged)	Tierra Ed Planeta Ltd	18	+3	75	+10
17	Increased (unchanged)	Venetian Care (Venetian Care Partnership)	18	+3	70	+10
18	Decreased (unchanged)	Lexon Children Ltd	16	0	70	0
19	Decreased (unchanged)	Ambition Care Ltd	15	0	70	0
20	Positive (unchanged)	Children Support Services (CSS)	14	0	50	0
21	Negative (unchanged)	Positive UK Youth Ltd	14	Not available/not in 2020	Not available/not in 2020	Not available/not in 2020

Nurture UK Taken Care Ltd has been included in this and subsequent tables as it was a company was entry into the children's homes market this year, having ownership of previously separate companies and entering 20 places in the rankings. This highlights that companies can participate in and Footballer in the market via buying homes.

The 11 to 21st largest companies owned 20 homes, just over the number Certitude Holdings PLC owned alone.

Overall, the 21 largest companies owned 583 homes - 43% of all private children's homes. These companies provided 3,900 places, 46% of all places in the private sector. Less than 2% of companies provided 50% of all private businesses in total. This further highlights the relative size and continuing growth of these top companies. Almost half of all private homes are now under the ownership of 21 companies.

Inspection outcomes of privately owned children's homes

Due to COVID-19, Ofsted suspended all routine inspections of social care providers on 17 March 2020, at the request of the Secretary of State. This meant we are unable to carry out routine inspections during the 2020-21 inspection activities. For more information about our work during the pandemic, see our 'Ofsted's approach to inspection during the spread and recovery of coronavirus' and our 'Ofsted's approach to inspection during the spread and recovery of coronavirus' and our 'Ofsted's approach to inspection during the spread and recovery of coronavirus' pages. Any small changes to the inspection outcomes of providers may be due to administrative errors.

As at 31 March 2021, the inspection profile for the 2,871 private children's homes with judgements, were as follows:

- 394 (13%) were graded outstanding.
- 1,958 (68%) were graded good.
- 479 (17%) were graded requires improvement to be good.
- 39 (1%) were graded inadequate.

While this release only includes inspection activity up to 31 March 2021, more visits and inspections have happened since. Routine inspection of social care providers restarted on 12 April 2021. Some settings inspection grades may have improved or declined since 31 March 2021.

Nationwide, 8% of the 1,617 children's homes inspections that were carried out between 12 April and 31 July 2021 resulted in a change to the provider's inspection grades of their homes. The company with the largest proportion of homes graded outstanding or good was Compass Community Ltd. Over a quarter (27%) of its 15 homes inspected had improved their inspection grade.

Their companies in the top 21 have similar inspection outcomes to their rival companies in the post year. In the same period, Certitude has not been operating its usual inspection activity, due to the high number of children in its care who have been shielding because of its vulnerability. This is further evidence of the company's strong and continuing growth. A great proud return to routine inspection, from 1 September 2020 Ofsted started carrying out assurance visits to children's social care services.

Monitoring visits

We carried out on-site monitoring visits as necessary to settings inspected under the social care common inspection framework (SCCIF) in line with usual guidance. This included follow-up on urgent safeguarding concerns.

Of the 2,310 privately owned children's homes active as at 31 March 2021, 697 homes (34%) had received a total of 951 monitoring visits since 1 April 2020. Among the homes that received monitoring visit were 4 of the 10 largest providers of children's homes in England.

Of the 697 homes that received monitoring visits, 276 (40%) were graded as 'requires improvement to be good' or 'inadequate'. Of these, 94 (24%) were owned by the single largest provider, Certitude Holdings PLC.

Assurance visits

As part of a phased return to routine inspection, from 1 September 2020, Ofsted started carrying out assurance visits to children's social care services. At these visits, inspectors evaluated the sector's ability.

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- leaders and managers were exercising strong leadership

We prioritised visits based on the provider's most recent inspection judgements, other information we held about the providers, the amount of time since the last inspection and whether the provider was newly registered and therefore had not yet received a first inspection.

Ofsted's 2,310 privately owned children's homes that were active as at 31 March 2020, 645 (32%) received an assurance visit between 1 September 2020 and 31 March 2021. Among the homes that received monitoring visit were 4 of the 10 largest providers of children's homes in England. Of the 645 homes that received an assurance visit, 75 (12%) were owned by the single largest provider, Certitude Holdings PLC.

Although assurance visits did not result in an overall effectiveness judgement, they provided Ofsted with information about the quality of care in the sector. Of the 645 homes that received an assurance visit, 75 (12%) had received a monitoring visit and were 16 of the 38 homes previously judged to be inadequate, and 277 (42%) of the 297 homes previously judged to require improvement to be good.

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Table 3: Number of homes owned by the 21 largest providers that received an assurance visit, and where serious and widespread concerns were identified

Position	Top company	Number of homes that received an assurance visit	Serious and widespread concerns identified
1	Certitude Holdings PLC	27	5
2	Nova Group (inc3 Esports Healthcare Private Equity Ltd)	21	3
3	The Outcomes First Group (OOFG) and subsidiary	17	2
4	The Priory Group (Partnership in Care Ltd Ltd)	16	2
5	Nurture Care and Footballer Ltd	20	2
6	Vertitude Care Ltd (VCL Team)	15	2
7	Stewart Care Services (SCS Group Ltd)	13	2
8	The Partnership of Care Today (Partnership of Care Ltd)	12	2
9	Care Homes Plc	12	2
10	Methodist Phoenix Ltd	12	2
11	Working Brands Ltd	12	2
12	Anchor Care Ltd	12	2
13	Compass Community	12	2
14	Theodore Care Limited (Theodore Ltd)	12	2
15	Reflexion Care Group	12	2
16	Tierra Ed Planeta Ltd	12	2
17	Venetian Care (Venetian Care Partnership)	12	2
18	Lexon Children Ltd	12	2
19	Ambition Care Ltd	12	2
20	Children Support Services (CSS)	12	2
21	Positive UK Youth Ltd	12	2

Independent fostering agencies

Independent fostering agencies (IFAs) provide care to children who are looked after by a local authority. Some IFAs are part of a wider company ownership chain, but many are single providers. Single providers of IFAs operated fewer places than single providers of children's homes, at an average of 16 places.

Among the 10 privately owned IFAs that were within a company ownership chain, the top 10 companies accounted for 75% of all private IFAs and operated more places, that offer more than 1,000 places through the IFAs they own.

The top 10 companies accounted for 61% of all private IFA places in England as at 31 March 2021, with the largest provider at 12%.

The largest provider, Axis Outcomes First Group (OOFG) Ltd, provided 6,275 places. This is 10% of all IFA places provided by the private sector.

There are 8 companies that appear on the list of largest providers for both children's homes and IFAs. These companies are: Certitude Holdings PLC, the Outcomes First Group, Children's Care Plc, Nurture UK Taken Ltd (Priority), and Compass Community Ltd.

Comparison among the largest providers of both children's homes and independent fostering agencies

Table 4: Comparison among the largest providers of both children's homes and independent fostering agencies

Position	Top company	Number of children's homes	Number of places	Number of IFAs	Number of places
1	Certitude Holdings PLC	198	1,275	1,275	1,275
2	Nova Group (inc3 Esports Healthcare Private Equity Ltd)	108	840	840	840
3	The Outcomes First Group (OOFG) and subsidiary	67	370	370	370
4	The Priory Group (Partnership in Care Ltd Ltd)	58	350	350	350
5	Nurture Care and Footballer Ltd	58	350	350	350
6	Vertitude Care Ltd (VCL Team)	47	330	330	330
7	Stewart Care Services (SCS Group Ltd)	43	255	255	255
8	The Partnership of Care Today (Partnership of Care Ltd)	39	225	225	225
9	Care Homes Plc	34	205	205	205
10	Methodist Phoenix Ltd	34	205	205	205
11	Working Brands Ltd	26	170	170	170
12	Anchor Care Ltd	25	150	150	150
13	Compass Community	24	135	135	135
14	Theodore Care Limited (Theodore Ltd)	23	75	75	75
15	Reflexion Care Group	19	50	50	50
16	Tierra Ed Planeta Ltd	18	75	75	75
17	Venetian Care (Venetian Care Partnership)	18	70	70	70
18	Lexon Children Ltd	16	70	70	70
19	Ambition Care Ltd	15	70	70	70
20	Children Support Services (CSS)	14	50	50	50
21	Positive UK Youth Ltd	14	50	50	50

Annex: Information by Ofsted region

Table 5: Number of children's homes and places, by Ofsted region

Ofsted region	Number of children's homes	Number of places
Ofsted region	198	1,275
Ofsted region	108	840
Ofsted region	67	370
Ofsted region	58	350
Ofsted region	58	350
Ofsted region	47	330
Ofsted region	43	255
Ofsted region	39	225
Ofsted region	34	205
Ofsted region	34	205
Ofsted region	26	170
Ofsted region	25	150
Ofsted region	24	135
Ofsted region	23	75
Ofsted region	19	50
Ofsted region	18	75
Ofsted region	18	70
Ofsted region	16	70
Ofsted region	15	70
Ofsted region	14	50
Ofsted region	14	50

16	Woodspeed Photo Ltd (Affiliate/Leads)	7
17	Venture Lessons Ltd (No Fees Front Ed Tech)	7
18	Ed Tech Ventures Ltd	7
19	Ed Tech Ventures Ltd (Affiliate/Leads)	7
20	Collegian Coaching Ltd	7
21	Pearson Core Media Ltd	7
22	Bellhouse Consult Ltd	7
23	Tree Out Properties Ltd	7
24	Apollo Digital Media Group Ltd (Affiliate/Leads)	7
25	Core 4 Children Media Ltd	7
26	Blue Planet Media Ltd	7
27	Christian Education Value Ltd	7
28	Tertiary of Tears Ltd (Parent)	7

Ownership of voluntary IFAs in 2020

As at 31 March 2021, there were 28 voluntary children's homes. Of these:

- 18 (64%) were single providers
- 10 (36%) were owned as part of another big company with at least 7 homes

Compared with the previous year, there were much fewer large companies in terms of number of homes. Only one top company, The Together Trust, had more than 10 homes under their ownership.

Table 4: The largest providers of voluntary children's homes, as at 31 March 2021

Position	Top providers	Number of children's homes
1	The Together Trust	14
2	St. Christopher's Fellowship	10
3	Ginger	9
4	The Catalyst Foundation Ltd	7
5	Bilvestone	7

Inspection outcomes

Due to COVID-19, at the request of the Secretary of State, Ofsted suspended all routine inspections of social care providers from 17 March 2020. Therefore, we are unable to complete the 2019 to 2020 of the 2019 to 2023 inspection extensions as normal, and we completed fewer inspections than in previous years as a result.

The latest full graded inspection outcomes for the 19 voluntary children's homes with judgements were as follows:

- 18 (95%) were graded outstanding
- 1 (5%) was graded good
- 0 (0%) were graded requires improvement to be good
- 1 (5%) was graded inadequate

Monitoring visits

Of the 19 voluntary-sector-owned children's homes that were active as at 31 March 2021, 18 received a monitoring visit or assurance visit since Ofsted began its 2019 to 2023 inspection cycle. Of the 18 homes that had an inspection judgement as of 31 March 2021, and the remaining 8 homes (32%) had not yet been inspected. The only voluntary-home provisionally graded inadequate was one of the homes visited.

Assurance visits

Of the 19 voluntary-sector-owned children's homes that were active as at 31 March 2021, 8 received focused assurance visits since Ofsted began its 2019 to 2023 inspection homes visited. 29 (76%) had full inspection judgement as of 31 March 2021, and the remaining 2 homes (7%) had not yet been inspected. The only voluntary-home provisionally graded inadequate was one of the homes visited.

Independent fostering agencies

Third children to care (TTC) are in Ofsted's sight. This can be provided by either local authority-owned or independent fostering agencies (IFAs). Independent fostering agencies have provided care to around 25,000 children in England through IFAs.

As at 31 March 2021, there were 307 IFAs operating in England. This number excludes those that are only for adoption services or those that are only for short breaks, and excluded those 10 IFAs throughout the rest of this release. The 307 IFAs offered a total of 39,800 fostering places for children. This was a net increase of 18 IFAs (6%) from the previous year, and a net increase of 1,300 fostering places (3%). Over the last 5 years, the net result of 2 IFAs was operating and 5 designated fewer. The number of IFAs increased by 5,100, or 14%, more on the previous year.

Data on the number of places provided by each IFA comes from Ofsted's annual fostering sees collection. As the 2020 collection is ongoing, data included here reflects the 2019 to 2020 collection, and we have included estimates for those IFAs that did not yet register their inspection during 2020 to 2021. Due to the impact of COVID-19, a small number of agencies did not submit data in the 2020 collection, although the response rate was 97%. To ensure that the data is as complete as possible, we have included the number of registered places, we calculated estimated figures for the agencies, the provided estimates by taking average of the data submitted by agencies for the IFAs in year 2. Within this release, we included the estimated figures for the 10 IFAs.

The private sector has grown from 2020 to 2021, with a net increase of 16 IFAs. This resulted from 24 new registrations and 5 deregistrations. These new private IFAs provided 1,300 fostering places for children. The voluntary sector had 2 new registrations within the voluntary sector. There were also an increase of 8 IFAs places offered by private companies.

In the voluntary sector, there was a decrease in the number of IFAs. This was the result of 2 new registrations and 4 deregistrations. However, the number of places offered by voluntary IFAs increased by 400 places. As a result, the private sector has increased its share of the market to 74% (+2%). From IFAs in 2019 to 2020, 14% (+1%) were owned by the voluntary sector.

Figure 6: Changes in the number of IFAs and IFA places, by sector, from 31 March 2020 to 31 March 2021

Numbers may not sum due to rounding.

Ownership of private IFAs

Although many IFAs are single providers, we cannot tell from the ownership data if a company is a single provider, or part of a larger company chain. Some of those companies can only a few IFAs, but some are a considerably large number.

As at 31 March 2021, there were a total of 34 private companies that owned at least 2 IFAs. These 34 companies owned 156 IFAs (65%) and 29,800 IFA places (74%). Compared with the voluntary IFA Table 4, the top 34 private companies, owned 137 more IFAs than the top 28 voluntary providers. The top 34 private companies also had 27,500 more IFA places than the top 28 voluntary providers.

As a result, throughout the following section of the release, we have disaggregated the data by 3 different types of ownership:

- Single provider: IFAs that are within the ownership chain of a small company. For this release, we defined small company as one that owns multiple IFAs, but offers fewer than 1,000 fostering places through all of the IFAs it owns.
- Part of a large private company: IFAs that are within the ownership chain of a large company. For this release, we defined large company as one that owns multiple IFAs, and offers more than 1,000 fostering places through all of the IFAs it owns. This is consistent with the definition used in previous releases of this report.

When determining the size of companies, we chose to use the number of IFA places owned by the company, as opposed to the number of IFAs they own. This is because the number of fostering places is a more accurate way to know children it could offer. We felt that the number of IFAs owned by a company offers little or no information about the size of the IFA, as it could be a small IFA, with a small number of places, but still be part of a large company, and vice versa. We have offered IFA places, the total number of fostering places, in all of our analysis.

We have extracted data from Companies House about the ownership of 237 of the 239 privately-owned IFAs. For the remaining 2, there was no data available on Companies House. Of the 237 IFAs, 156 (67%) were single providers, 30 (12%) were owned by 5 small providers, and 51 (22%) were owned by 7 large providers.

Figure 7: Number of private IFAs as at 31 March 2021, by ownership type

Number of IFAs excludes 2 providers for which there are no data available on Companies House.

The largest number of private IFAs were single providers (156 providers, 67%). However, these IFAs accounted for less than a third (29%) of the 39,600 places provided by all private IFAs.

The majority of private fostering places (65%) were provided by the 51 IFAs owned by large providers (20% of all private IFAs). This is because IFAs owned by large providers offer more places than those owned by small providers or single providers. On average, each, compared with 120 places per IFA owned by a small provider and 75 per IFA single provider.

Figure 10: Number of private IFA and private IFA places as at 31 March 2021, by ownership type

Number of IFAs excludes 2 providers for which there are no data available on Companies House.

Among the private sector, small providers accounted for the complete number of both IFAs (30, 12%) and places (3,790, 10%). The total number of places provided by small providers increased by 1,000 places (+36%) from last year.

The Outcomes First Group (OFG) Topco Ltd was the only large provider to offer a median number of places in 2021, compared with 2020 (20 fewer places). This is because OFG Topco Ltd increased the number of IFA places it offered by a net increase of 1,300 places. Among the other large providers, 2 others had decreased their offer: 2020 to 2021 Mother Ltd (Nexus Children's Services) Ltd, and Aberdeen Holdings (Jersey) Ltd. Aberdeen Holdings (Jersey) Ltd's decrease was because Ofsted had IFAs in companies still increased, because their remaining IFAs expanded in size.

Small private providers of IFA places

In addition to the 7 large providers, there were 5 medium-size companies that owned 2 or more IFAs each. These small providers accounted for 30 IFAs (12% of all private IFAs) and 3,790 IFA places (10% of all private IFA places). The number of places increased by 1,000 places (+36%) from last year. The total number of places provided by these companies ranged from 70 to 1,300.

Table 8: Small providers of private IFA places as at 31 March 2021

Position	Position change	Top company	Number of IFA places 2021	Change in number of IFA places since last year
1	Position unchanged	The Centre for First Group (Old Pharos Topco Ltd)	1,270	20
2	Position unchanged	Nurture UK Topco Ltd (Parent)	1,050	+330
3	Position unchanged	Compass Community Ltd	1,000	+320
4	Position unchanged	Aldershaw Holdings Ltd	1,000	+320
5	Position unchanged	Positive Foster Care Ltd	1,400	+320
6	Position unchanged	Cambian Holdings PLC	1,300	+320
7	Up by 2 places since last year	Fast Track International Ltd	1,300	+320
8	Down by 1 place since last year	Ofsted	1,300	+320

Among the private sector, small providers accounted for the complete number of both IFAs (30, 12%) and places (3,790, 10%). The total number of places provided by small providers increased by 1,000 places (+36%) from last year.

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The largest private providers of IFA places

There were 3 private companies that offered over 1,000 fostering places, and are considered large providers. These providers owned 51 IFAs (20% of all private IFAs) and 19,100 private IFA places in England as at 31 March 2021 (20,400 and of 20,300 places).

The list of largest providers in 2021 is the same as that in 2020, except for 1 extra company. Plus there is Ofsted's, which was the seventh-largest provider of IFA places in 2020. It offered a total of 1,070 places through the IFAs in its ownership chain. This year, Ofsted's IFAs offered 1,300 places, which was the equivalent to the 320 places increase compared from 2019 to 2020. It is not the total number of places provided.

Table 9: The largest providers of private IFA places as at 31 March 2021, compared with 31 March 2020

Position	Position change	Top company	Number of IFA places 2021	Change in number of IFA places since last year
1	Position unchanged	The Centre for First Group (Old Pharos Topco Ltd)	1,270	20
2	Position unchanged	Nurture UK Topco Ltd (Parent)	1,050	+330
3	Position unchanged	Compass Community Ltd	1,000	+320
4	Position unchanged	Aldershaw Holdings Ltd	1,000	+320
5	Position unchanged	Positive Foster Care Ltd	1,400	+320
6	Position unchanged	Cambian Holdings PLC	1,300	+320
7	Up by 2 places since last year	Fast Track International Ltd	1,300	+320
8	Down by 1 place since last year	Ofsted	1,300	+320
9	Position unchanged	Outcomes First Group (Topco) Ltd	1,300	+320
10	Down by 1 place since last year	Tender Parents of Youth Ltd	1,300	+320

As at 31 March 2021, there were 3 small providers that had previously been single providers (like companies owned only 1 IFA each). These were UK Fostering Ltd (Formerly Ofsted Ltd), Ofsted Ltd, and Ofsted Ltd. These companies were acquired, with Positive Adoptions Ltd now owning 1 IFA, and UK Fostering Ltd owning 2 IFAs. The number of places provided by these companies increased by 1,000 IFA places from 2020. This has been because of the under the ownership, and expansion of, Ofsted Ltd. Ofsted Ltd's ability to increase IFA places has been the result of its acquisition of other companies.

The 4 remaining small providers all owned the same number of IFAs as in the previous year. However, all had an increase in the total number of places provided by these IFAs.

Inspection profile of the largest private providers of IFAs as at 31 March 2021

According to regulations, Ofsted has a duty to inspect IFAs at least once within a 3 year period. Ofsted's ability to inspect IFAs has been affected by requiring immunity for staff and usually in inspection within a shorter time frame.

Due to COVID-19, Ofsted suspended all routine inspections of social care providers on 17 March 2020, at the request of the Secretary of State. As a result, the grade profile of IFAs as at 31 March 2021 has changed very little since March 2020, as Ofsted changes were made to IFA inspections and judgements.

The largest private providers IFAs continue to have a better grade profile than average all private IFAs nationally. Of the IFAs that had received an inspection grade as at 31 March 2021, 100% of the IFAs owned by the top 3 private providers were graded as good or outstanding, compared with 97% nationally. The same was true for the small private providers, of which 96% were good or outstanding.

Although we had to suspend routine inspections in March 2020, 17 private IFAs (9%) received a monitoring and/or assurance visit from Ofsted between 1 April 2020 and 31 March 2021.

This release includes inspection activity up to 31 March 2021 only. However, visits and inspections carried out after 31 March 2021 will be included in the next release, which is rescheduled on 31 March 2022. As a result, some settings inspection grades may have improved or declined since 31 March 2021.

Monitoring visits

We carried out six monitoring visits to settings inspected under the SCEF, as necessary. This is in line with guidance, including to follow up an urgent safeguarding concerns.

Between 1 April 2020 and 31 March 2021, 16 (94%) of the 259 private IFAs had received a monitoring visit or assurance visit since Ofsted began its 2019 to 2023 inspection. 2 (6%) were judged inadequate of their most recent full inspection. The remaining 14 (88%) that received visits were previously judged good (11), or had not yet been inspected (3).

Among the 16 private IFAs that received monitoring visits, 8 were rated as good or outstanding, compared with 97% nationally. The same was true for the small providers, 96% of these. There were 2 providers of private IFAs that received monitoring visits and were independently owned.

Assurance visits

From 1 September 2019, Ofsted started carrying out assurance visits to children's homes, as part of a phased return to routine inspection. Between 1 September 2020 and 31 March 2021, 20 (14%) of the 259 private IFAs received an assurance visit. Of these IFAs, 8 were owned by the largest providers.

Although assurance visits did not result in inspection judgements, they were used to inform Ofsted's risk-based inspection programme. Of the 20 private IFAs that had received an assurance visit, and were active as at 31 March 2021, half were rated as widespread concerns identified. One of these IFAs was a single provider, and 1 was owned by a large provider.

Figure 11: Number of monitoring visit and assurance visits received by private IFAs active as at 31 March 2021, by ownership type

Numbers of the ownership large providers, small providers, and single providers exclude the 2 IFAs for which there are no data available on Companies House.

Figure 11 is to scale.

Ownership of voluntary IFAs

Of the 46 voluntary IFAs that were active as at 31 March 2021, 20 (43%) were single providers, 10 (22%) were owned by small providers, and 16 (35%) were owned by large providers. Although the majority of voluntary IFAs are single providers, the majority of voluntary IFA places (65%) were owned by large providers.

All 8 of the voluntary companies that owned multiple IFAs offered fewer than 1,000 fostering places in total, so are considered small providers. The 8 voluntary IFAs that were owned by small providers accounted for over two-thirds of all fostering places provided by voluntary IFAs (2,140, 68%).

Figure 12: Proportion of IFAs and IFA places provided by voluntary and private IFAs, by ownership type

Number of IFAs excludes 2 providers for which there are no data available on Companies House.

Number may not sum due to rounding.

The number of IFAs owned by each small voluntary provider ranged from 1 to 7. The total number of places provided by these providers ranged from 100 to 700. The 7 voluntary providers that had more than 1 IFA in their ownership chain, offered 1,700 IFAs (51), and provided the most places (960). This number accounts for 31% of voluntary IFA places. The largest voluntary provider, Barnardo's, owned 7 IFAs and offered 700 places (8% of all IFAs). It is also ranked the number offered by the next largest voluntary provider (Barnardo's, 560 places).

Inspection profile of voluntary IFAs, owned by small providers and single providers, as at 31 March 2021

Similar to private IFAs, the inspection profile of voluntary IFAs has improved since March 2020. Of the IFAs that had received an inspection grade as at 31 March 2021, 100% of those owned by small providers were judged to be good or outstanding, compared with 89% of voluntary agencies owned by single providers.

Monitoring visits and assurance visits

Although we had to suspend routine inspections in March 2020, 7 of the 46 voluntary IFAs received some inspection activity between 1 April 2020 and 31 March 2021. No IFAs owned by small providers had had a monitoring visit or assurance visit since March visit. These 2 IFAs were split between the different ownership types, with 1 being owned by small providers and 3 being single providers. No serious and widespread concerns were identified at the assurance visits.

Companies among the largest providers of both children's homes and IFAs (private)

There were 6 companies that appeared on the list of largest providers for both children's homes and IFAs (private). These companies are: Compass Community Ltd (Nexus) (OGP Topco Topco), Nurture UK Topco Ltd (Phoenix) and Compass Community Ltd

- Cambian was the largest provider of children's homes (396 homes, offering 870 places), and the sixth-largest provider of IFA places (1 IFA, offering 1,300 places).
- The Outcomes First Group (OGP Topco Topco) ltd was the third largest provider of children's homes (with 32 homes, 320 places), and the largest provider of IFA places (10 IFAs, offering 1,300 places).
- Nurture UK Topco Ltd (Phoenix) was a new entry at number 2 on the list of largest providers of children's homes (with 30 homes, offering 300 places), and the second-largest provider of IFA places (2 IFAs, offering 2,900 places).
- Compass Community Ltd was number 5 on the list of largest providers of children's homes (with 25 homes, offering 250 places), and the third-largest provider of IFA places (3 IFAs, offering 3,200 places).

These 6 companies accounted for 19% of private children's homes, 19% of private children's home places, 27% of private IFAs, and 40% of private IFA places.

Contacts

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Annex: data tables for figures

This section contains the underlying data in an accessible table format for all figures.

Data for Figure 1: Number of secure children's homes and places, by sector

	Number of homes	Number of places
Local authority	12	220
Voluntary	1	10
Total	13	230

See Figure 1.

Data for Figure 2: Number of RSS registered as children's homes and places, by sector

	Number of homes	Number of places
Private	51	1,240
Local authority	3	80
Voluntary	15	480
Total	69	1,790

See Figure 2.

Data for Figure 3: Number of short-break-only children's homes and places, by sector

	Number of homes	Number of places
Private	14	80
Local authority	105	660
Health authority	9	60
Voluntary	34	230
Total	162	1,010

See Figure 3.

Data for Figure 4: Number of children's homes and places, by sector

	Number of homes	Number of places
Private	2,031	7,550
Local authority	340	1,650
Voluntary	91	500
Total	2,462	9,700

See Figure 4.

Data for Figure 5: Comparison of the sector breakdown of children's homes as at 31 March 2020 and 31 March 2021

	As at 31 March 2020	As at 31 March 2021
Private	1,804	2,031
Voluntary	99	91
Local authority	307	340
Total	2,210	2,462

See Figure 5.

Data for Figure 6: Number of private children's homes in England as at 31 March 2021, by ownership type

	Type of ownership	Number of Homes
Single providers		239
Under ownership of a company that owns 2 or more homes		901
Owned by a top 21 company		880
Total		2,020

See Figure 6.

Data for Figure 7: Proportion of IFAs and IFA places provided by the private sector

	% of IFAs	% of IFA places
Private	84	90
Voluntary	16	10

See Figure 7.

Data for Figure 8: Change in the number of IFAs and IFA places, by sector, from 31 March 2020 to 31 March 2021

	As at 31 March 2020	As at 31 March 2021
Number of private IFAs	240	259
Number of private IFA Places	31,100	35,700
Number of voluntary IFAs	52	48
Number of voluntary IFA Places	3,610	4,010

See Figure 8.

Data for Figure 9: Number of private IFAs as at 31 March 2021, by ownership type

	Type of ownership	Number of private IFAs	% of private IFAs
Single provider	156	61	
Small provider	30	12	
Large provider	71	28	

See Figure 9.

Data for Figure 10: Number of private IFAs and private IFA places as at 31 March 2021, by ownership type

	Type of ownership	Number of private IFAs	% of private IFAs	Number of private IFA places	% of private IFA places
Single providers	156	61	10,200	29	
Small provider	30	12	3,760	11	
Large provider	71	28	21,600	61	

See Figure 10.

Data for Figure 11: Number of monitoring visit and assurance visits received by private IFAs active as at 31 March 2021, by ownership type

Private IFAs by ownership type	Number of monitoring visit and assurance visits
All active private IFAs as at 31 March 2021	259
Large providers	71
Small providers	30
Single providers	156
Large providers with a monitoring visit	5
Large providers with an assurance visit	6
Large providers with an assurance visit where serious and widespread concerns were identified	1
Small providers with a monitoring visit	0
Small providers with an assurance visit	3
Small providers with an assurance visit where serious and widespread concerns were identified	0
Single providers with a monitoring visit	11
Single providers with an assurance visit	26
Single providers with an assurance visit where serious and widespread concerns were identified	1

See Figure 11.

Data for Figure 12: Proportion of IFAs and IFA places provided by voluntary and private IFAs, by ownership type

	% Independently owned	% Small provider	% Large provider
Voluntary IFAs (48)	42	58	0
Voluntary IFA places (4,010)	32	68	0
Private IFAs (257)	61	12	28
Private IFA places (35,600)	29	11	61

See Figure 12.

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