Ontario Agencies Supporting Individuals with Special Needs
Agences ontariennes de soutien pour les personnes qui ont des besoins spéciaux

OASIS Operating Cost Pressures Survey Report

2017

Submitted by: 363 Consulting
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The data collected belongs to OASIS and will be distributed as they determine.

Executive Summary

The OASIS Operating Pressures survey was sent out to Developmental Services (DS) Sector organizations to complete from August 18, 2017 until September 15, 2017.

As with the previous surveys, the intent was to gather information regarding the DS sector's increased operating cost pressures; where the pressures were arising from; how organizations were dealing with the pressures; and, to solicit ideas for dealing with these pressures that other agencies could adopt.

The survey was distributed to the organizations using email (OASIS ED mailing list and the Provincial Network Member's mailing lists) and participants were asked to complete an on-line survey. It is estimated that approximately 225 organizations were asked to participate.

123 organizations participated for a 55% participation rate (an increase of 12% over the 2014 survey).

These 123 organizations account for:

- Over $950 million in total annualized budgets (approximately 42% of the total provincial DS budget)
- Over $815 million in MCSS funding
- Supporting more than 58,000 individuals (35,000 supported by MCSS funds).
- Employing over 23,000 people (10,004 full time, 9,071 part time, 3,513 casual, 2,041 management - approximately 75% of the employees in the sector).

The overall message from the survey respondents can be summarized as:

- Low staff morale
- Services to individuals are being cut or reduced
- Agencies are not able to maintain the desired quality of service
- More time and effort is required to comply with administrative regulations (time and effort taken away from client care)

Unfortunately, this is almost identical to the messages of the last survey conducted in 2014.

When asked to provide details about their current situation, many organizations provided similar responses:

- Increased administrative burden
- Less professional development for staff
- Less training for staff
- Less individual care being provided
- Less specialized service
- Infrastructure repairs and maintenance being delayed
- Eliminated recreational activities
- Positions remaining vacant longer, if filled at all
- Only able to provide the basics
- Staff issues encompassed recruitment, retention and morale

The Ministry indicated they will invest $5 million in 2017-18 in capital funding to support:

- *repairs, renovations and improved spaces for more people at residential properties that serve adults with developmental disabilities; and*
- *a new specialized residential support home for individuals with complex needs who are moving from justice facilities.*[1]

This is fortunate, as a common refrain from many participants was that upkeep of capital assets has been delayed or scaled back over the last few years. This approach appears to be catching up to the sector, as last year unexpected expenses were almost $12 million, many of which were infrastructure related. This dollar figure has risen significantly since the last survey was conducted.

As expected, organizations have taken steps to try and manage their increasing operating costs. Reducing staff hours and/or positions as a step has increased almost 10% since the last survey. Permanently closing a program, or shutting one down for a specific period of time (e.g. summer, Christmas) has remained fairly consistent over the last few surveys, as has changing the delivery method for a program.

However, the numbers that stand out in this survey, are those of organizations not filling open positions, up over 50% since the last survey; organizations increasing the number of individuals

[1] *http://www.mcss.gov.on.ca/en/mcss/about/ppar/index.aspx*

in a program without increasing staffing levels (up 12%); and, organizations choosing to reduce program hours of operation (down 35%).

The organizations as a sector have cut over 100 FTE's and currently have over 200 FTE's not filled. This is in addition to cutting almost 5,000 staffing hours a week.

Disturbing is that although the number of organizations choosing to reduce program hours has fallen dramatically, the actual reported hours being cut per week has more than doubled since the last survey. Although the staffing hours being cut are decreasing, the program hours being cut is increasing.

The cumulative results since the first survey carried out in 2012, bearing in mind that statistics were not gathered for a couple of years, show:

- 40,000 staffing hours/week cut
- 375 FTE's cut
- 4,385 program hours/week cut
- 29 programs permanently shut down

The question *How many people have been affected by program changes* implied the number of individuals receiving support, however a few organizations pointed out, that not only these individuals were affected, but that also staff had been laid off or transferred as a result of these changes. One agency summed it up by stating it was their opinion that all people served, as well as staff, have been impacted directly or indirectly by cost cutting, cost pressures and services changes.

Regardless, even if the numbers provided were just for individuals receiving support, over 900 individuals being supported were directly affected. If the families of the individuals receiving support, and the families of staff are taken into account the real number of people being affected by program changes is obviously much higher.

Mentioned frequently this year was low morale and higher stress in the workplace. Minimal wage increases, less 1 on 1 care, fewer job opportunities, fear of job loss, and increased workloads all contribute to this. The tone of the survey could be summed up by one agency's response:

Staff are feeling that they are not getting a reasonable increase which brings down morale and creates a culture of why should I do more when I am not recognized by the employer giving more. People see other sectors receiving increases but not ours - if the government doesn't value our work why should we.

Again this year, the use of sick leave and other unpaid leave increased. Noted more often this year, was that these shifts are only being partially covered, if at all.

Organizations continue to implement innovative changes. Similar to the last few surveys, these initiatives included technology changes or upgrades, reviewing service provider contracts, increasing fundraising efforts, restructuring roles and applying for grants. New this year was the purchasing of properties to generate revenue, increasing the use of social media and coordinating community outings with other group homes.

There is concern that the lack of support to the sector is promoting institutional living as group living grows in size; that increasing costs are pushing services away from a focus on social inclusion towards that of basic care, and that support programs to assist people becoming part of their communities are lacking.

Organization Information

The survey data was provided by 123 organizations this year. This represents an increase of 12% over the last OASIS survey on operating pressures.

The total budget for the respondent organizations is over $950 million.

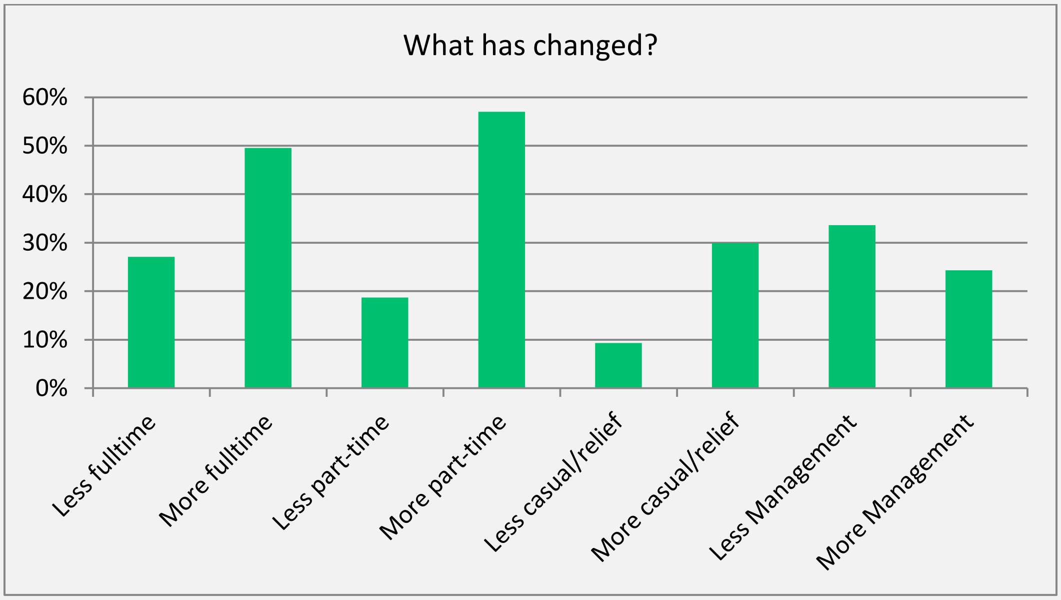
These organizations represent over $815 million in MCSS funding.

The total number of individuals served by these organizations is 56,311. This includes over 35,000 individuals supported by MCSS funds.

Employment for these organizations broke down as follows:

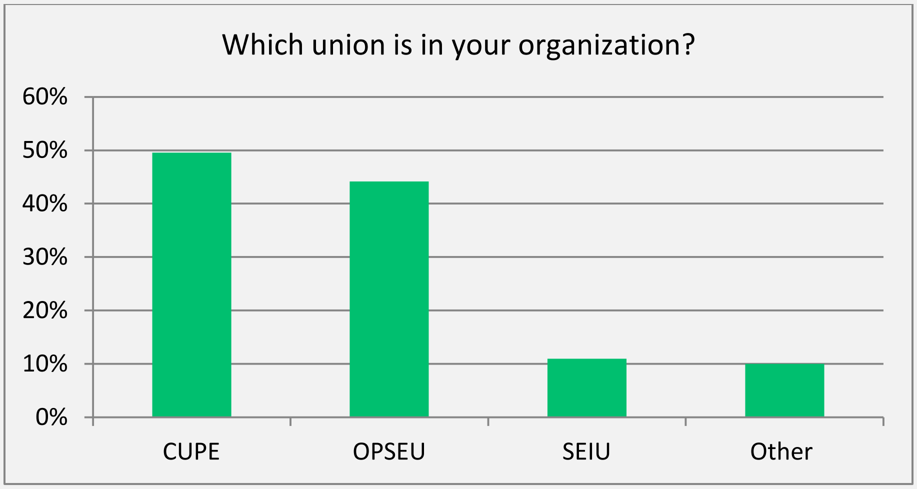
- 10,004 full time employees,
- 9,071 part time employees,
- 3,513 casual workers, and
- 2,041 management positions in the sector

Unlike the previous survey, where fewer than half the organizations indicated that the percentage of workers in each category had changed over the past few years, the results this year indicate that for 75% of the organizations it has changed. These changes can be seen in the chart below.



The good news is that these numbers appear to be changing in a positive direction. Twice as many agencies indicated that they had increased their full time staff than those who had cut. This is likely in response to the recent Ministry funded expansion of services. However, the sector has cut its management work force over the same period of time.

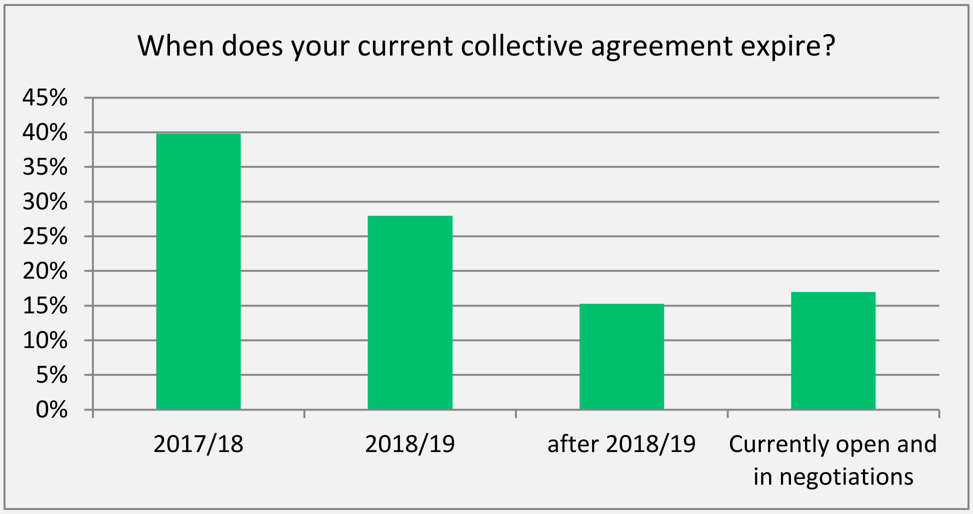
This year, 78% of the survey respondents indicated that they had a union in their organization. The two major unions in the sector are CUPE and OPSEU. Other unions in the sector include SEIU, IBEW, ONA, IAMAW and the United Steel Workers.



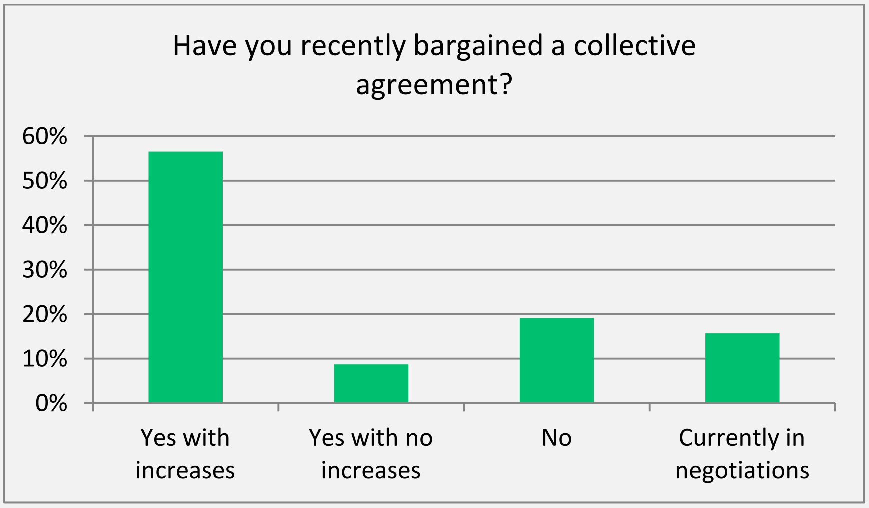
Compensation Information

Union Organizations

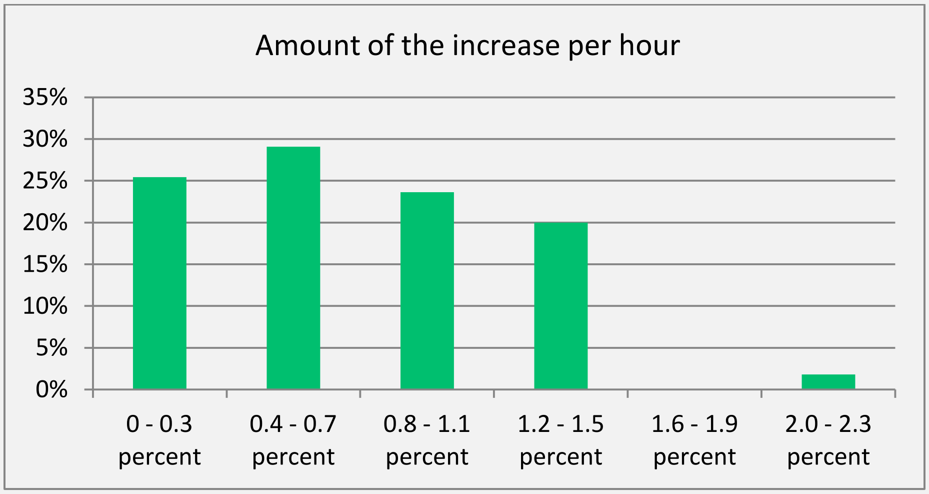
Less than 20% of the respondents are currently in negotiations for a new collective agreement while 40% have agreements which expire at the end of this fiscal year (March 31/18).



55% of organizations have recently negotiated a collective agreement which included increases for 2017/18 (not including pay equity obligations).



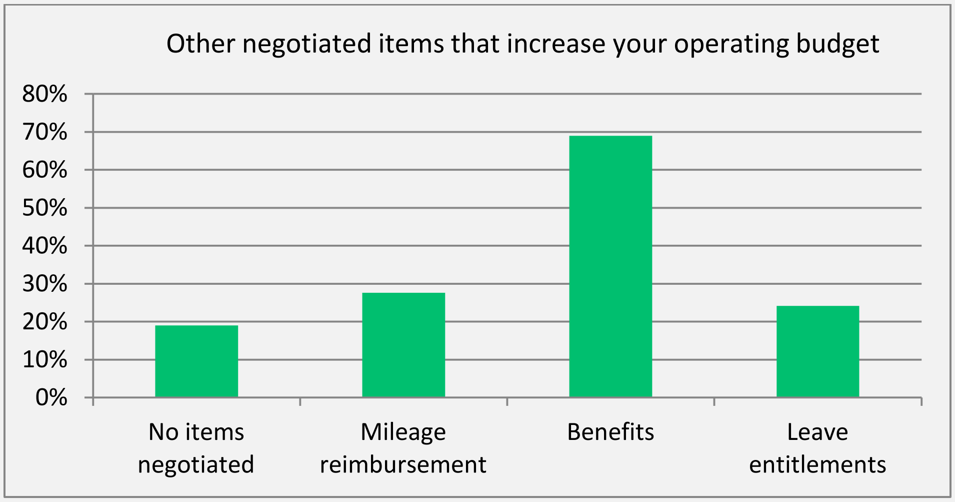
Almost all of these increases were below 1.6%, which translates to $1.8 million in increased wages for the sector for 2017/18.



Just over 30% of respondents indicated that they had negotiated a wage increase (not including pay equity obligations) for 2018/19. The vast majority of these increases are less than 1.6% which works out to over $750,000 in increased wages for the sector for the next fiscal year.

Asked if their organization had a business plan to manage these increased costs, 50% of respondents that provided an answer said that they did. However, many organizations did not reply to this question so this number could be misleading.

Apart from wages, many organizations also negotiated other compensation items in their agreements.



Besides the usual negotiated items in the chart above, organizations also negotiated items such as:

- Increased meal allowances
- Shift premiums
- Signing bonus
- Lump sum payments or one-time stipend
- Increased hours for staff that had been reduced previously

These benefits total almost $1 million for the sector for the next fiscal year.

Over 45% of these organizations will also provide their non-unionized staff with the same increase as the settlement with their union for 2017/18. For fiscal year 2018/19 this number drops to 25%, with more than half of the respondents 'not knowing' at the moment.

Non-union organizations

One third of the non-unionized organizations will be providing their staff with a wage increase for 2017/18; over 40% will not be; and, the remaining organizations are still uncertain if they will be or not.

Almost all increases will be less than 2%, equaling just over $1.3 million dollars for the fiscal year.

Over 70% of these organizations will not be providing any increase in benefits.

Two thirds of the organizations do not know if they will be providing a wage increase for 2018/19.

All organizations

Almost 50% of organizations will be providing management positions with an increase in 2017/18, with 30% not knowing if they will be or not. For the fiscal year 2018/19, less than 20% of organizations are providing management with an increase, while almost 70% are as yet uncertain.

Despite the uncertainty, confirmed increases represent approximately $250,000 per year increase in management compensation for the sector.

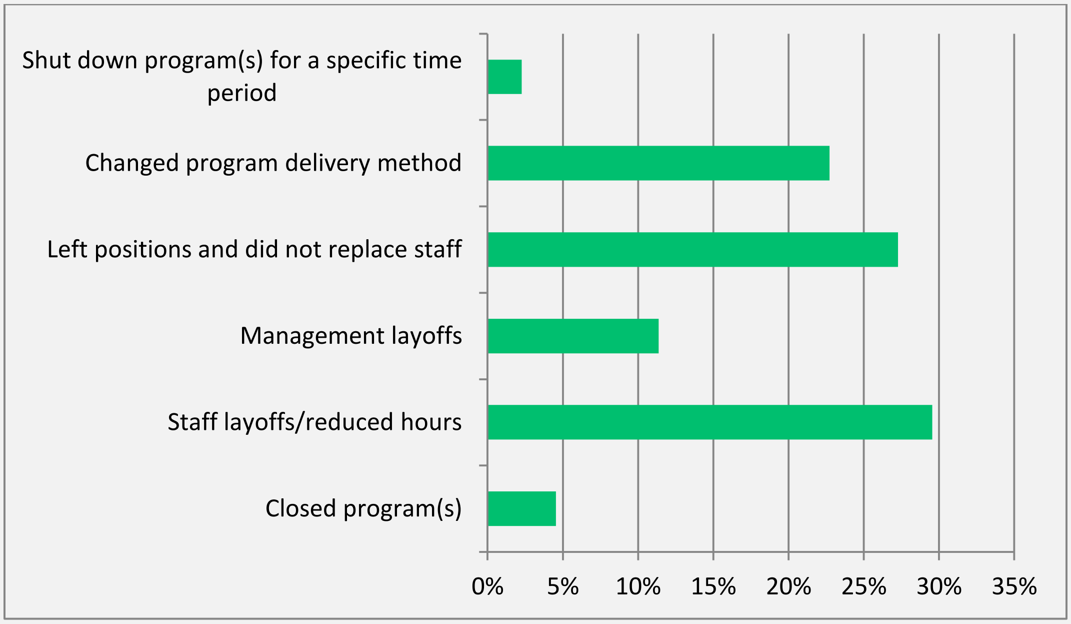
Pay Equity Obligations

This year, 45% organizations indicated that increased operating costs were a result of pay equity obligations. This is down from the 2014 survey results of 56%. However, this still represents an almost $7 million impact to the budgets of these organizations.

54% of organizations reported that they have achieved all target rates in their pay equity plan. For the 2014 survey this number was almost 67%, while the 2015 pay equity survey indicated that this number was 63%.

20 organizations provided data on the amount that they paid in pay equity increases annually since 2009/10, the total amount was consistent at $1.2 million per year for these organizations.

Asked how they were able to achieve these payouts, the chart below highlights those area's most affected.



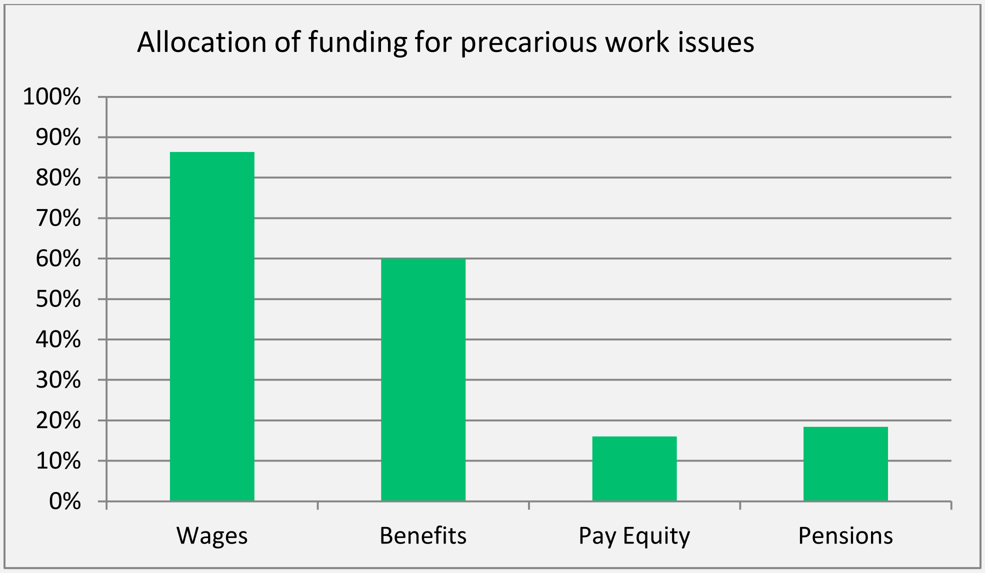
Other methods used to achieve these payouts were:

- Reducing benefits
- Increasing fundraising
- Reducing vehicle fleet
- Technology savings
- Reducing the grocery budget
- Obtaining grants

- Mortgaging a property
- Increasing fees

Precarious Work Issues Funding

Asked how their portion of funding for precarious work issues from the wage enhancement funding in 2014/15 and 2015/16 was allocated, the majority replied that it went towards wages and benefits.



Other ways this funding was utilized were:

- Training
- Vacation enhancements
- Shift premiums
- Added new positions
- RRSP contributions

The next few questions had a low response rate and as such the results could be considered unreliable.

65% of organizations indicated that they were current with their pay equity obligations. This is similar to the 2015 OASIS pay equity survey which indicated that 63% were current.

50% of organizations that answered the question *"How many years are you in arrears for your pay equity obligations*?" are three or more years in arrears.

A minimum of $2.4 million is required to meet this current pay equity obligation. More than one organization was not sure what their current debt is for these obligations. This figure was $10 million from the 2015 pay equity survey. With a low response rate to this question the $2.4 million could be considered suspect.

Four organizations indicated that they had a complaint with the Pay Equity Commission, while three organizations indicated that they had received an Order from the Pay Equity Commission.

Hopefully these complaints are being dealt with as the 2015 pay equity survey found that 27 agencies had outstanding complaints.

Operating Costs

Not unexpectedly, almost all organizations indicated that they have had increased costs due to inflation. All the standard inflationary items affected them (i.e. heat, hydro, fuel, water, insurance), while over 40% indicated that their taxes had also risen. Numerous organizations indicated that food prices were a serious concern. Other items mentioned often included:

- Repairs (vehicle/buildings)
- Supplies
- Telecommunications
- Medical equipment
- Rent

These inflationary items added up to $4 million for the sector.

Almost 80% of respondents said they had not seen any savings from reduced Hydro rates. For those that indicated they had, the savings added up to $110,000.

In response to the question *"How are you managing the increasing operating costs?",* (96% response rate) the results were:

Question answered Yes to	2017 (%)
Reducing staff hours?	58
Eliminated staff positions?	53
Not filling open positions?	63
Reduced program hours?	27
Permanently closed program(s)?	11
Shut program for period of time?	21
Changed program delivery method?	24
Increased # of individuals with no staff changes?	51
Expansion of services with new funding?	70

Across the sector these percentages reflect:

- 4,963 fewer staff hours per week
- 102 FTE's positions cut
- 209 positions left vacant
- 2,530 fewer program hours per week
- 13 programs permanently shut down
- 17 programs temporarily shut down
- 39 programs' delivery methods affected

Expanded services with new funding included:

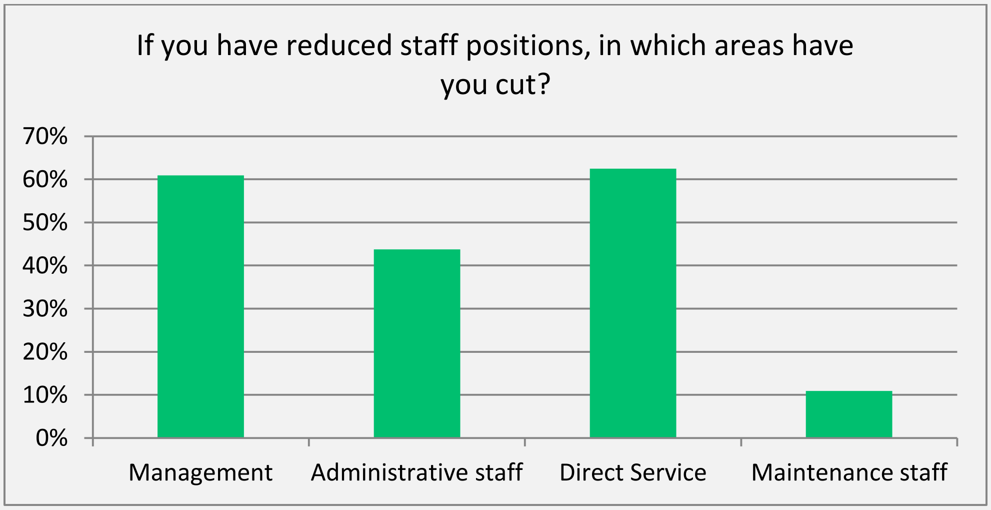
- SIL
- Passports
- Residential
- Host family arrangements
- Day programs
- TAY
- Community participation
- Respite services
- Complex care
- Fee for service
- Autism
- Employment support

As well, over 20% of respondents implemented new service fees over the past year. These new service fees were for items such as transportation, day programs, rents, administration, Passport and increased respite fees.

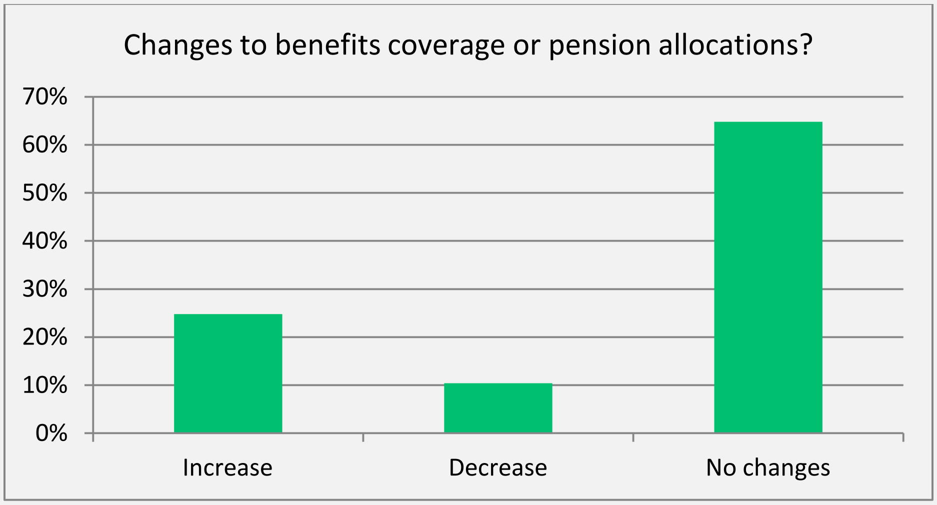
Operating Cost Management Activities

Seven organizations indicated that they had sold a property after closing a program. Most of the proceeds of these sales were used to purchase another property, although a few organizations used the proceeds for repairs and maintenance on other programs in their agency.

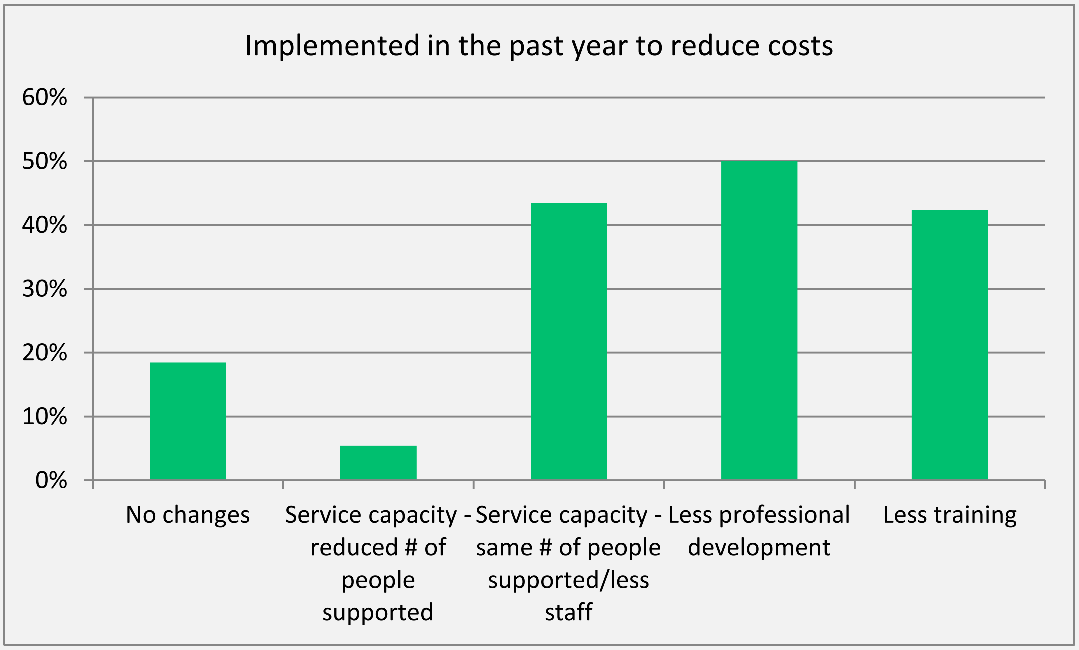
To reduce costs, organizations indicated that they have reduced staff positions in the following areas:



The majority of organizations have not made any changes to benefits coverage or pension allocations.



Many organizations have cut back on professional development and training while supporting the same number of people with less staff.



75% of respondents have admitted more individuals to their programs over the past three years to capture additional funding. This totals almost 600 more individuals receiving services over this timeframe.

Many responses to the question, "What have you done to manage your increased costs in the last year", are very similar to previous survey results. Activities put into practice included:

- Reducing or delaying preventative maintenance
- Reducing social events
- Delaying capital purchases
- Negotiating staff benefit reductions
- Increasing program service fees
- Delaying in filling staff vacancies
- Changing the organization's strategic direction
- Negotiating with, or changing key suppliers for better rates
- Closing a money-losing business
- Increasing contracting out of services
- No longer engaging in an Accreditation process

- Conducting reviews to look for operational efficiencies or savings
- Obtaining additional funding from MCSS
- Increasing the use of technology
- Reducing staff hours, overtime and sick leave allotments
- Reducing office supplies and not replacing furniture and equipment
- Reducing individuals transported by agency vehicle (reducing staff hours as a result)
- Travelling less (clients and staff)
- Amalgamating organizations to reduce administrative costs
- Increasing fundraising, using the money for basics, not extras
- Downsizing office and program space
- Renting space to other agencies

Almost 60% of the organizations responded they had encountered unexpected expenses this past fiscal year. The total cost of these expenses was $11.9 million dollars.

Expenses included things such as:

- Strike preparation costs
- Termination and severance payouts
- Repairs to homes (roofs, septic systems, foundations, decks, wiring, fire panels, etc.)
- Vehicle replacement and maintenance
- Being charged for fire drills
- Increase in maternity/parental leave
- Fire in a residence
- Needing new program space
- WSIB charges
- EHT regulation change

Of the 12 organizations indicating they had submitted a business plan for managing their increased costs to MCSS, the Ministry has approved five of them.

Less than 20% of respondent organizations have posted their business plan to their website.

60% of organizations have found or implemented new operational efficiencies over the past year. These include:

- Implementing AIMS (numerous agencies)
- Bundling services (internet/phone)
- Using web based office suites, payroll, scheduling software
- Restructuring departments
- Online training
- Changing IT service providers
- Automating call in systems (scheduling)
- Increasing tendering on purchases
- Implementing EFT system
- Upgrading payroll/document management/mobile technology systems
- Sharing IT costs with other organization
- Increasing the use of video conferencing
- Increasing the use of public transit
- Implementing virtual servers
- Installing energy efficient lighting
- Changing administrative processes
- Performing LEAN analysis of agency operations

Eight organizations indicated that the Employer Health Tax regulation changes had affected them, and that it had cost them a combined $100,000.

Deficit Questions

30% of respondents have projected an operating deficit for 2017/18, which works out to almost $6 million for these 35 organizations.

25% of organizations had a deficit for 2016/17. This totaled $1.4 million.

Few organizations answered the question asking if they had a plan on how to reduce this deficit. Of those organizations that did have a plan to address their deficit, ideas being investigated or implemented are:

- Lump sum mortgaging repayments
- Selling a property
- Transferring funds from the capital donation account
- Increasing fundraising efforts
- Reducing unionized staff
- Increasing fees for service programming
- Discussions with MCSS
- Implementing unpaid days off for employees

Over 60% of respondents indicated that there has been a negative impact on the quality of their services as a result of increased costs. Comments repeated by several organizations included:

- Lower staff commitment and morale (staff team events cancelled)
- Increased stress levels for staff and management (fear of layoffs, increased workloads)
- Less community connections for individuals
- Harder to implement individualized programs (more group activities)
- Diminished one to one time with individuals resulting in decrease in goal achievement
- Negative impact on quality of services and care
- Agencies becoming risk averse, meaning expansion of services is unlikely
- Shifts are not being backfilled
- An inability to accept complex individuals
- Only able to provide ‘basic’ food, clothing and shelter
- Difficulty in attracting and retaining qualified staff
- More individuals on waiting lists

- Spending more time managing costs than planning for impactful community supports and services
- Increased government reporting requirements taking time from individuals
- Not enough management to properly administer front line staff
- Increase in staff injuries resulting in higher WSIB rates, more STD and LTD claims
- Difficulty fulfilling respite requests

Currently 75% of organizations are covered by WSIB.

Twelve organizations indicated that they currently self-insure and 24 indicated that they purchase private insurance. For these organizations, should Bill 145 pass, the total incremental cost would total just over $1 million if they have to use WSIB. This number is low as just under half of the agencies have completed the calculations. These same organizations have a total labour cost for their group homes of $121 million. Using the WSIB rate for a group home for calculations, this in fact would require almost $4 million dollars to insure.

As well, their total labour costs for administration and day programs is over $5 million. Using the WSIB rate for these activities, it would require an additional $72,000.

Collaboration & Advocacy

30% of the organizations have discussed the possibility of merging with another organization

35% of organizations have embarked on collaborative activities, and others are in the process of analyzing their options.

Some of the collaborative activities mentioned this year included:

- Sharing training
- Sharing IT support
- Sharing an Executive Director
- Merging agencies
- Sharing accounting, recruiting, administrative resources
- Making group purchases
- Sharing office space and equipment

This past year, 35% of the organizations' management engaged in public advocacy regarding their financial circumstances and the community crisis situation. In addition to writing letters to the Editor, holding town hall meetings and meeting with MPPs, other activities included submissions to Government (e.g. Bill 148), meetings with MCSS, ongoing conversations with community leaders and partners, recruiting Board members who are influential in their communities, engaging with OASIS and provincial networks, having petitions read in the Legislature, and educating their employees about their financial situation.

Innovation

35% of organizations implemented innovations to address their financial pressures.
Some of the innovations implemented were:

- Purchasing a commercial building and becoming landlords
- Purchasing a farm to create visibility and revenue streams
- Increasing middle management input into budget discussions
- Implementing new insurance model for group benefits
- Increasing the use of social media
- Charging staff for personal use of cell phones
- Using arbitrators rather than lawyers to settle disputes
- Cultivating a specialty in complex support of TAY's
- Identifying and researching means of modernizing business processes
- Increasing Fee for Service program capacity
- Installing solar panels
- Holding art program sales
- Coordinating community outings with other group homes

Miscellaneous

75% of organizations indicated that they are seeing an increase in the use of sick leave or other types of unpaid leave. This is up from 56% the last time this survey was conducted in 2014.

25% of respondents received Orders because they did not meet the Fire Code; while 70% indicated that their residential programs will meet the Fire Code by January 2018.

The Orders relate to deficiencies in sprinkler systems, number of staff needed on a shift, self closing doors, fire door installation, wall treatments and other routine inspection items. Almost 60% of respondents indicated that they had received some Ministry funding to meet these obligations.

Recommendations

Keeping in mind that an Ontario election is set for June 7, 2018, the survey results can be utilized to educate and question candidates about the sector's stresses and challenges. Topics which could be discussed with election candidates and incumbents at 'All Candidates Meetings', with community groups, with families of the individuals, etc. are:

- Stable, increased, long-term funding for the sector as a whole
- The sector requiring money for infrastructure upgrades and maintenance
- Once clearer, the impacts Bill 145 and 148 will have on the sector:
    - how will they affect staff compensation budgets?
    - how will they affect overall operating budgets?
    - how will this impact individuals service(s)?
    - where is the funding coming from to address any increases in costs?
- Pay equity deficits

Draft a series of questions that agencies can use at All Candidates Meetings across the province.

Draft a short survey to be sent to all party leaders in order to hold them accountable after the election should they go back on on their responses/promises.

Contact local media with extreme cases, which unfortunately is what it takes to become a story, to highlight an agency's situation, or the sectors' as a whole.

Follow-up on innovations of interest that you have seen in this document. OASIS can put you in touch with organizations that have already implemented these.

Use the OASIS bulletin board. You can find it online at http://oasisonline.ca/ Contact OASIS if you would like a specific topic created.

Take part in and contribute to OASIS initiatives.

Continue to investigate and pursue collaborative and efficiency opportunities.

Year to Year Comparison

Question	2012	2013	2014	2017
# of organizations who completed the survey	**139**	**111**	**94**	**123**
Organization				
# who had a union	73.2%	75.2%	77.7%	77.7%
# who did not have a union	26.8%	24.8%	22.3%	22.3%
# of individuals supported	NOT ASKED	NOT ASKED	41,366	56,311
# of employees	NOT ASKED	14,500	21,000	22,703*
Compensation Questions				
Was there a wage increase negotiated for this fiscal year? (not including pay equity obligations)	*2012/13*	*2013/14*	*2014/15*	*2017/18*
Yes	67%	58%	72%**	77%
No	33%	42%	18%	20%
Currently negotiating	NOT ASKED	NOT ASKED	10%	3%
Was there a wage increase negotiated for next fiscal year? (not including pay equity obligations)	*2013/14*	*2014/15*	*2015/16*	*2018/19*
Yes	82%	24%	55%	32%
No	15%	45%	27%	39%
Unknown	3%	31%	18%	29%
Have you, or will you, provide a wage increase to staff for the next fiscal year? (non-union organization)	*2013/14*	*2014/15*	*2015/16*	*2018/19*
Yes	13%	35%	14%	13%
No	26%	10%	52%	23%
Unknown	61%	55%	33%	64%

Question	2012	2013	2014	2017
Will you be providing a wage increase to management positions for this fiscal year?	*2012/13*	*2013/14*	*2014/15*	*2017/18*
Yes	49%	58%	26%	48%
No	27%	42%	21%	23%
Unknown	24%	N/A	53%	29%
Will you be providing a wage increase to management positions for the next fiscal year?	*2013/14*	*2014/15*	*2015/16*	*2018/19*
Yes	30%	11%	15%	19%
No	13%	7%	7%	14%
Unknown	57%	83%	78%	67%
Pay Equity				
Are increased operating costs a result of pay equity obligations?				
Yes	53%	63%	56%	45%
No	47%	37%	44%	55%
What is the total dollar amount required to make your pay equity obligations current?	NOT ASKED	$2 million	$6.2 million	$6.9 million
Operating Costs				
Do you have any increased operating costs as a result of inflation?				
Yes	92%	96%	98%	95%
No	8%	4%	2%	5%
What is the total dollar amount (estimate) of these inflationary items?	NOT ASKED	$6.3 million	$5.1 million	$3.9 million

Question	2012	2013	2014	2017
How are you managing the increasing operating costs?	*83% responded*	*94% responded*	*96% responded*	*95% responded*
Reducing hours of staff positions	65%	62%	50%	58%
Eliminating staff positions	60	51	42	53
Not filling open positions (e.g. maternity leave)	59	58	10	63
Reducing programs hours of operation	21	18	63	27
Permanently closing program(s)	9	7	7	11
Shutting down programs for a specified period of time	11	16	21	21
Changing program delivery method	27	26	19	24
Increasing # of individuals served in programs with no change in staff levels	40	47	39	51
Expansion of services with new funding	NOT ASKED	NOT ASKED	NOT ASKED	70
For each question above that you answered "Yes", please provide details	*total across sector for respondents*			
How many staffing hours have you cut (total per week)?	NOT ASKED	28000	7200	4963
How many positions have you cut (FTE's)?	NOT ASKED	140	145	102
How many positions have you not filled (FTE's)?	NOT ASKED	93	140	209
How many program hours have been cut?	NOT ASKED	665 hrs/week	1190 hrs/week	2530 hrs/week
How many programs have you permanently shut down?	NOT ASKED	8	8	13
How many programs have you temporarily shut down?	NOT ASKED	42	26	17
How many programs have you changed the delivery method for?	NOT ASKED	57	53	39
How much have you increased the # of individuals in a program with no change in staffing?	NOT ASKED	10-20%	10-20%	NOT ASKED
If you have reduced staff positions, in which areas have you cut?	*% of organizations that cut in this area*			
Management	45	43	60	61

Question	2012	2013	2014	2017
Administrative staff	35	38	37	44
Direct Service	78	77	46	62
Maintenance staff	5	10	6	11
Did you have any unexpected expenses this year?				
Yes	NOT ASKED	NOT ASKED	48%	56%
No	NOT ASKED	NOT ASKED	52%	44%
Total dollar amount of these costs	NOT ASKED	NOT ASKED	$3.9 million	$11.9 million
Deficit				
Has your organization budgeted for a deficit for this fiscal year?				
Yes	28%	26%	21%	29%
No	72%	74%	79%	71%
Did your organization have a deficit in previous years?				
Yes	39%	35%	30%	24%
No	61%	65%	70%	76%
General Questions				
In your opinion, has there been an impact on the quality of your services as a result of increased costs?				
Yes	68%	66%	67%	61%
No	32%	34%	33%	39%
Have you found or implemented any new operational efficiency in your organization? e.g. technology changes/upgrades				
Yes	63%	67%	75%	59%
No	37%	33%	25%	41%

Question	2012	2013	2014	2017
Have you implemented any "innovative ways" to manage your financial pressures?				
Yes	40%	36%	41%	35%
No	60%	64%	59%	65%

** 10,004 full time, 9,071 part time, 3,513 casual, 2,041 management*
*** low response rate, numbers should not be assumed to represent the sector as a whole*