



Business Plan 2022-25

Papworth Trust

Supporting disabled people to have equality, choice and independence

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First Steps to Success in Ipswich

Emerging from our work are amazing stories of success. Here, Jason and Angela tell us their story. Jason is in his early twenties and has high functioning Autism, anxiety and depression and lives with family. Angela works at First Steps to Success, a person-centred employment programme, which supports Jason.

Since leaving University, Jason has applied for several vacancies but rarely gets an interview. Although he likes his own space, in the last year and before the pandemic, he has been

feeling quite isolated and frustrated.

When Jason came to First Steps to Success, we spoke about volunteering and he started on a weekly basis at an animal charity, whilst we continued with employability skills, wellbeing, and confidence building.

Jason was then put forward for the Kickstart programme by the Job Centre. So, we upped interview role play training sessions, including the STAR technique – the Situation he had to deal with,

the Task he was given to do, the Action he took and what happened as a Result. It wasn't too long before he had an interview and was successful for an admin position.

When Jason came to First Steps to Success, we spoke about volunteering... It wasn't too long before he was successful for a position.

Introduction from the Chair and Chief Executive



With great pride and excitement, we introduce our 2022–25 Business Plan to support our organisational strategy: to deliver good quality homes, jobs and services that enable our customers to achieve their aspirations.

We welcomed views and feedback from our customers, their friends and family, our staff, volunteers, and funders and gained rich information on our future priorities. From these conversations grew our four strategic objectives; Customer Focus, Sustainability, Grow our Impact and External Influence.

The last two years have been incredibly tough due to Covid and Brexit, and this year has the potential to continue in the same vein. We enter another year with Government funding being an ongoing challenge, costs of materials and labour exponentially increasing, and the sector experiencing workforce scarcity as never experienced in our working lifetime.

Despite all of these challenges, we continue to deliver great services, improving the quality of our engagement with customers, their families and carers. We have further developed our ways of working with our staff

to increase wellbeing and promote equality, diversity, and inclusion.

Our innovative approach to technology, listening and learning has meant that customers have benefitted from an increased number of ways to access our services, when traditional methods may have been reduced due to restrictions. We continue to embrace new technologies and actively look for ways it can support our existing and future customers in a way that is better suited to their needs.

Despite all of these challenges, we continue to deliver great services, improving the quality of our engagement with customers, their families and carers.

Although the immediate future poses some significant challenges for us to overcome, we have a superb team of great people with strong values who continuously drive the Trust to learn and improve, maximising the impact we have on the lives of disabled people.



Brian Stewart OBE
Chair



Sarah Miller
Chief Executive

Overview of the organisation



Papworth Trust has supported disabled people's equality, choice and independence for 105 years. We're able to deliver a positive impact across Cambridgeshire, Suffolk and Essex through our:

281 Staff

27% of whom have a disability themselves



663 homes

490 of which offer supported living.

60 volunteers



5 Opportunities Without Limits centres

which provide 250 people with learning disabilities with 47,950 sessions a year. These are designed to reduce isolation, access new activities, teach independent living skills and progress towards employment.

2,093

individuals supported towards and into work through our employment programmes.



4 care services

which deliver 248,768 hours of support to our 38 supported living customers.





Our vision is to create a world where disabled people are seen for who they are. Here's our impact in 2021/22, set against the backdrop of UK Government* and UN Sustainable Development Goals**

Reduce the disability employment gap*

We've supported:

332 people into paid employment.

18 employers to be disability confident.

Of the customers who joined us:

48% are feeling more confident.

58% now feel ready to secure employment.

Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all**

50% of our Opportunities without Limits customers reviewed their progress in the last 12 months, of whom 9 in 10 showed clear advancement towards their goals.

Provide high quality care to disabled people, enabling our customers to have equality, choice and independence

Of the care customers we have surveyed, 100% feel safe and 100% feel in control of their support.

Our CQC regulated services are rated 'Good' or 'Outstanding'.

By 2030, make human settlements inclusive, safe, resilient and sustainable**

74% of our homes are adapted for disabled people.

1.8% of the total value of our housing stock re-invested to ensure that our homes are enabling places to live, increasing year on year.

Our History



Dr Pendrill Varrier-Jones provides basic support to patients at the newly founded Cambridgeshire tuberculosis colony.



Patients were treated to a regime of continuous fresh air, regular meals, alternately resting in shelters and participating in light carpentry and horticulture. It was a remarkable success.

Varrier-Jones purchases Papworth Hall in Papworth Everard for the sum of £6000 (about £200,000 in today's money).

His objective was to provide after care for those suffering from Tuberculosis. Once their condition had stabilised with hospital treatment he aimed to re-establish them with training and modified work regimes providing accommodation and care.

Papworth hospital moves to the newly formed National Health Service in 1954.



— 1917



— 1930s

Factories constructed in Papworth Everard to provide work opportunities for patients.



— 1938

Prime Minister Neville Chamberlain praises Papworth Industries and its Travelling Goods Department, later named the Chamberlain Workshop.

— 1954

— 1963

Papworth Trust forms, supporting disabled people to live independently.

— 2017

Our Royal Patron, the Duchess of Gloucester visits to mark centenary celebrations in 2017.

— NOW

Today, our services for disabled people remain relevant to our core from 1917. You can find out more at www.papworthtrust.org.uk



Our people and achievements this year



VIP Gold Awards 2022



GOLD

Gold award went to the team at Opportunities Without Limits, South West Cambridgeshire



SILVER

Silver Award to Wendy Fletcher, Support Worker in Lowestoft



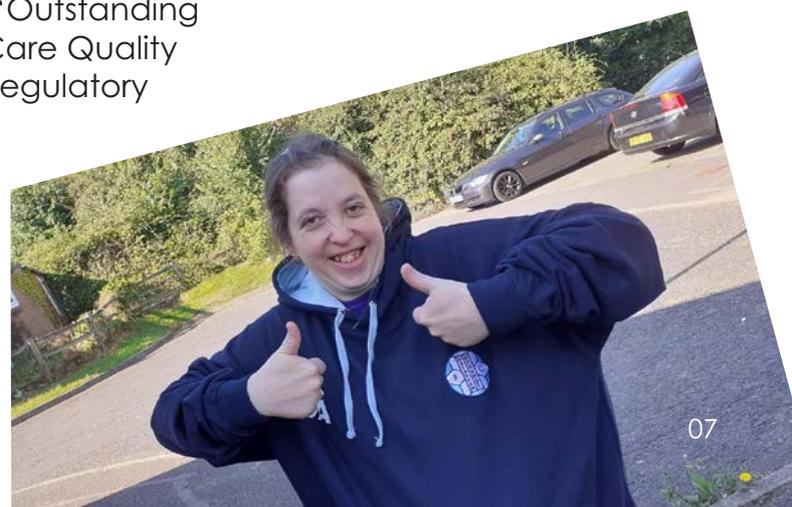
BRONZE

Bronze Award to Trina Rose, Support Worker in Vange Place Haverhill

Accreditations

Over the last year, we have:

- been shortlisted for the TPAS Outstanding Tenant Engagement Award, recognising our work on revising our tenant engagement model and delivering services through the midst of Covid-19 and construction challenges
- been shortlisted for Employment Related Services Association (ERSA) Disability and Health Team of the year, recognising the Covid-19 employability challenge
- retained our Disability Confident Leader status for a further 3 years
- gained Silver accreditation as Investors in People
- retained our 'Outstanding and Good' Care Quality Commission regulatory standard



Customer focus



We will



Respond to the needs of our customers, providing support to achieve their aspirations



Learn from our customers through engaging and co-producing our services and our offer



Measure and monitor the impact our services have on the lives of our customers to learn and improve



Co-design service standards and assess our performance against them

The challenge

To continue to deliver great services for our customers, we need to fully understand what it is they want and need and then how we can deliver this. Here, a huge challenge is to support customers who may not know how to engage with the Trust due to communication preferences, digital support, cognitive or physical needs or a lack of understanding of their rights and aspirations.

Moving forward, to fully meet our customers' future needs, we must design and shape our services with them. With services in place, we must monitor the impact to understand if we are meeting customers' needs and how to continuously improve.

Without consistent monitoring targets developed by customers, we cannot know

how we are performing or where we need to improve and could be delivering inadequate services and homes that don't meet customer needs.



The benefit of working with Papworth Trust is having someone to talk to, an organisation that can signpost and guide; to get solutions to issues and who can open doors to opportunities we never knew existed. The Trust has a great pool of knowledge and experience which I am so grateful for.

Mary-Ellen, employment customer

Our actions

Implement our experts by experience programme, where customers audit service delivery, and the outcomes drive positive improvements.



Implement our self-assessment programme to drive service improvements.

Roll out our customer charter, establishing ways to monitor organisation service standards better.

Understand the positive difference we are making through our newly-created impact assessment framework.

Work alongside customers to design projects they want/need and secure funding to deliver these.



Results and outcomes

A targeted flexible network of customer forums established within our services; in a way that encourages people to fully contribute, capturing their feedback to shape our offer.



Clear service-specific and organisational delivery standards in place, which are measured to ensure progress against set targets.

More effective communication of the impact we make to the lives of disabled people, which initiates and provides evidence for positive change.

Greater customer engagement: sharing feedback on their experiences (positive and negative) on using the Trust's services, enabling us to learn and drive improvements.





We will



Invest in our people, processes and technology to provide a progressive and inclusive work environment



Use our asset management and net zero strategies to drive sustainability, whilst optimising our assets in accordance with our long-term financing plan



Build on our strategic relationship with Varrier-Jones Foundation and broaden our approach to unrestricted funding



Develop our management information strategy to support effective decision making and performance monitoring

The challenge

The Covid-19 pandemic has forced changes at a rapid pace to maintain effective service delivery for our customers. Many changes will be adopted longer term to evolve our culture and meet our staff recruitment and retention needs.

We strive to fully understand our property portfolio to identify the investment needs in light of the changing regulatory climate change building requirements.

The Trust and the Varrier-Jones Foundation operate independently of each other, and there is a danger that we are not making the most effective use of our combined resources to maximise opportunities for disabled people.

Disjointed and siloed data sets currently reside throughout the organisation impeding strategic decision making.



I have gained so much confidence and learnt new skills since living in my own home. I've even felt confident enough to start applying for jobs. I feel very safe in my home and my neighbours are lovely. Having my own home has changed so much for me, I love it.

Housing tenant

Our actions

Invest in our employee reward package; supporting agile and flexible working and providing opportunities for individual development to meet our future skills needs.



Complete an asset management review of our property portfolio to ensure it is fit for purpose for the longer term. We will produce asset management and property development strategies that will consider operating costs, net zero targets, viability, and sustainability.

Alongside the Varrier-Jones Foundation; seeking to be more strategic in our outlook, assessing and reporting on the impact that is achieved by effective use of resources.

Working with each department to develop a continuous improvement programme which reviews systems, processes, resources, and policies.



Results and outcomes

An organisation that can recruit and retain a well-motivated and rewarded workforce that is mission and values led and focusses on the impact and outcomes that our work can have. Staff are supported to reach their full potential with effective workforce planning to deliver the right business decisions.

An appraised property portfolio that understands our future needs, whilst considering operating costs, net zero requirements and embracing advances in technology.



Improved strategic alignment with the Varrier-Jones Foundation; and increased levels of unrestricted funding to reduce our dependency on statutory programmes.

A data culture across the organisation which informs, supports, and delivers effective business decisions based on accurate, standardised and centralised data.





We will



Develop and invest in our approach to innovation



Enhance our relationship management and strategic partnerships to maximise opportunities for disabled people



Develop and integrate Information, Advice and Guidance, Transition and Befriending into existing core service delivery



Implement our volunteer strategy to enhance the value of our services

The challenge

As we look to grow our impact, we must address the gaps in existing service provision to continue meeting the needs of disabled people.

Here, who we work with will need to be appropriately managed to avoid missed opportunities, frustration, and duplication.

We already know that navigating multiple sources of information and guidance can prove inaccessible and confusing for disabled people, leading to uninformed choices and decisions. While the transition between children's and adult services frequently leaves disabled people and their families confused due to the lack of information, support, and funding.

Among all this, people with a learning

disability can experience high levels of loneliness and social isolation – even more concerning when you consider that the Trust's volunteer group reduced by almost 30% during the pandemic.



Fraser is the happiest he has ever been and that is mostly down to the commitment of everyone who is supporting him at Byron Road. It is lovely to see him so settled and enjoying his life – I couldn't have imagined that he would be living the life that he has got.

Sally, parent of our care customer

Our actions

Work with our colleagues and customers to action their concepts into pilot designs, with supporting business cases using our innovation fund.



Better understand the external relationships held across the Trust and how to build on these for the benefit of disabled people.

Work with our services and partner organisations to support customers with Information, Advice, and Guidance. Where appropriate, securing funding for services to deliver this.

Work with schools and local authorities to promote our offering to young disabled people.

Undertake market research to identify befriending service opportunities.

Launch and embed our volunteer strategy.



Results and outcomes



An innovation fund and forum; to engage and champion ideas, recognising and rewarding successful contributions. We will learn from these pilot projects to continually improve our services for disabled people.

Formalised structures in place that build on our existing relationships and maximise opportunities for disabled people, particularly offering more ways to improve their wellbeing and reduce isolation.



Our customers know where to go to access good quality Information, Advice and Guidance and our staff are competent in sign-posting

Greater support offered to young disabled people across Cambridgeshire, Suffolk, and Essex.

Increased volunteer engagement providing added value for customers and bringing expertise and experience to our teams.

External influence



We will



Positively influence communities and national policy to meet the needs of disabled people



Use our Disability Confident leadership status and expertise to maximise opportunities for disabled people



Engage with Papworth Everard tenants and the wider community to enhance our relationships and our role in the village

The challenge

There are many challenges in the world in which we operate.

The UK's social care funding gap will require an additional £7bn per year across the sector by 2023/24.

Net-zero regulations mean that emissions from existing homes should be around half of today's levels by 2035, while the disability employment gap, estimated to be 28.4% in 2021, remains high.

Meanwhile, we want to ensure that we stay relevant to, and active within, the communities that we engage with and support.



Papworth Trust saved my life. I didn't want to come because I was ill, but I soon found that in Papworth Trust you can talk to wonderful people. You can express a feeling and people won't judge you. I used to be very lonely, but I've never had so many friends in my life as I have now. Papworth Trust is a very special place to me and I can never say thank you enough for all they've done.

Sammy, Opportunities Without Limits customer

Our actions

Campaign to raise the funding and profile of social care.

Progress towards having net zero properties in new construction.

Raise the profile of Disability Confident and engage with local employers to ensure that they recruit more disabled people.

Engage with the residents and stakeholders of Papworth Everard to enhance our role in the village.



Results and outcomes

Increases in Government funding for the social sector and fairer pay for our workforce.

Captured learnings and outcomes of net zero technology, working with our customers to understand the impact of any changes we make.

A further fifty organisations across Cambridgeshire becoming Disability Confident employers.

Greater social interactions with Papworth Everard residents and stakeholders and further developing our relationship with them



Our Foundations – other strategies in play



Our strategic objectives are the areas we will focus on throughout the duration of the Business Plan. However, to ensure we have strong foundations we have work underway in crucial areas of the Trust which are critical to our future success.



Digital strategy

To enhance our digital investment and develop our digital culture.



Customer engagement

Ensure our customer voice helps us to shape our organisation.



Financing plan

To support operations to deliver their needs and to ensure financial sustainability of the Trust.



Ethics

Aiming to drive ethical behaviour across the Trust in all our work.



Culture

To steer the Trust towards our desired working culture.



Value for money

To use the optimal combination of cost and quality, whilst ensuring sustainability and maximising our impact.



People/ equality, diversity, and inclusion

Driving a healthy, progressive work environment.



Health and safety

To improve and enhance the physical safety and safety culture of our organisation.



Asset management

To understand and make best use of our property portfolio.



Safeguarding

Prevent harm and reduce the risk of abuse or neglect.



Net zero/carbon neutral

To understand our organisation's carbon footprint and develop our approach towards a sustainable future.



Business continuity

To identify critical activities and establish priorities during a period of disruption.

Financial Overview



Income and Expenditure Summary 2022-25

Income

| | 2022-23 Budget | 2023-24 Plan | 2024-25 Plan |
|---------------------------------|-------------------|-----------------|-----------------|
| Housing | 4,728 | 4,991 | 5,206 |
| Work | 2,166 | 558 | 841 |
| Care | 4,185 | 4,352 | 4,527 |
| Opportunities Without Limits | 1,358 | 1,459 | 1,499 |
| Total Operational Income | 12,437 | 11,361 | 12,072 |
| Other Income | 2,243 | 2,132 | 2,137 |
| Total income | 14,681 | 13,492 | 14,210 |

Expenditure

| | | | |
|---------------------------------|-----------------|-----------------|-----------------|
| Housing | (4,270) | (4,454) | (4,573) |
| Work | (2,110) | (606) | (767) |
| Care | (4,473) | (4,592) | (4,700) |
| Opportunities Without Limits | (1,432) | (1,479) | (1,504) |
| Total Operational Income | (12,285) | (11,130) | (11,544) |
| Other Income | (1,112) | (1,165) | (1,119) |
| Total income | (13,396) | (12,295) | (12,663) |

Surplus

| | | | |
|---|--------------|--------------|--------------|
| Operations Surplus | 152 | 230 | 528 |
| Other Surplus | 1,132 | 967 | 1,019 |
| Total Operating Surplus | 1,284 | 1,197 | 1,547 |
| Interest payable | (384) | (326) | (300) |
| SHPS pension accrual | (155) | (155) | (155) |
| Total surplus before investment gains/(losses) | 746 | 717 | 1,092 |

Notes on income and expenditure:

Post Covid-19, we work in an increasingly challenging external environment. Growth in scale has been impacted, with some volume reduction due to contracts to deliver work programmes coming to an end, though we do anticipate some replacement programmes by 2024/25. Some modest growth is expected in the number of housing units we hold as we convert existing, under-utilised space into additional social housing. The scale of Care and Opportunities Without Limits operations are forecast to remain largely unchanged, in real terms, over the course of the plan.



Balance sheet and cash flow 2022-25

Cash demands are likely to be significant, with planned loan repayments of £3.0m and Social Housing Pension Scheme deficit repayments of £1.9m currently scheduled. We are establishing a new loan facility of £3m as well as planned asset disposals across our portfolio in 2022-23 to help finance this. No further disposals have been recognised in the Business Plan, however the Trust will continue to review our assets to identify potential future sales. Property investment continues, with £3m of capital expenditure on existing homes over the next three years. In addition to this we plan to invest £1.8m in development programmes to support further social housing units.

Key balance sheet and cash flow metrics:

- Housing properties growth from **£37.9m to £39.7m**
- Cash broadly maintained at **£1.5m+** throughout the Business Plan period
- Pension deficit liabilities reduce by **£1.6m**
- General reserves anticipated to strengthen to **£6.9m**
- Total assets forecast to grow from **£24m to £27m**

Key risks and sensitivities

Post Covid-19, we recognise there is a higher level of uncertainty around the external environment. Across many of our services we have strong levels of assurance for our financial projections. However, the following key financial risks threaten the delivery of this Business Plan, and our responses are detailed below.

Key Risk 1 - Varrier-Jones Foundation are not able to maintain the current level of donation:

- A reduced level of funding from the Foundation assumed, following adverse income impacts

- A further 10% reduction, and subsequent freezing of this, reduces cash received by £480k over the course of the Plan
- Adversely impacts delivery of services, capital programme and cash availability to meet known liabilities.

Response to risk:

- Review of unrestricted funding available to support under-funded services - the plan is currently resilient enough to support this at this level
- Further reduction would require additional financing – either investment drawdowns, or further loan financing to meet scheduled liabilities.

Key Risk 2 - Social Housing Pension Scheme (SHPS) deficit liability:

- Expected payments of £1.9m against the defined benefit pension scheme liability over the plan period
- Next valuation due as at Sept 2023. Adverse outcome likely to increase payments required. A 10% increase in current liability ~ an extra £300k by 2028.

Response to risk:

- The Trust would need to liquidate elements of its investment portfolio to meet this.

Key risks 3 - Incremental price rises across social care are insufficient to match the costs increases driven through the National Living Wage:

- Care costs are largely payroll-related, and pay rates offered are heavily impacted by the level of the National Living Wage, targeted to reach £10.50 per hour by the end of 2024
- If sufficient increased funding is not delivered, Care provision would become more uneconomic. A 1% shortfall in funding in yr.1 costs the Trust £40k. Consolidated, this becomes £135k by yr. 3, total impact across the plan of £260k.

Response to risk:

- Continued work with commissioners and sector bodies to campaign for increased funding, on-going monitoring of Care operations against key financial performance metrics to test the financial viability of our services.

Key Risk 4 - Ability to win future employment programmes:

- Significant element of our activity in this area is scheduled to cease in 2024/5 or before
- Successor programmes to the Work and Health Programme expected, but unconfirmed
- Absence of replacement activity impacts contribution and also yields significant end of contract costs; potential adverse impact of £100k.

Response to risk:

- Continue to build relationships with potential prime providers to be positioned appropriately to take on any opportunities. Plans for scale reduction required, should the market penetration that we seek not materialise.

Key Risk 5 - Material weakening of investment markets:

- Two main areas of exposure to investment markets; own investments and investments held in the closed defined benefit scheme
- Any material devaluation, although not likely to have an immediate cash impact for the Trust, would impact general reserves and liabilities
- Reserves held may be insufficient to meet the requirements of our reserves policy.

Response to risk:

- Existing policy provides for some loss of value. Investments are well diversified via experienced fund managers, and investment strategies are regularly reviewed.

Supporting disabled people to be seen for who they are.



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