

Papworth
Trust



Business Plan 2023-26

Supporting disabled people to have equality, choice and independence



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About this year's business plan

Our Business Plan celebrates our continued impact in supporting disabled people's equality, choice, and independence. In 2022 we set four Strategic Objectives – **Customer Focus, Growth, Sustainability** and

External Influence – and we remain committed to these until 2025. We hope you will enjoy reading about our progress towards these over the coming pages.



As we enter another year, we know that with our incredible team we will continue to deliver outstanding services to improve the lives of disabled people.

Brian Stewart and Sarah Miller
At the opening of Knutsford Road
Photo credit: Simon Watson Photography

Introduction

We are incredibly pleased to share our 2023–2026 Business Plan with you, which builds on our existing organisational strategy **to deliver good quality homes, jobs and services that enable our customers to achieve their aspirations.**

We remain keenly focused on how we can continue to engage with and improve our services for disabled people. Last year, we completed the development of ten new homes at Basingbourn, our first building project in years, and were delighted to secure an extension to our delivery of the Work and Health Programme.

We saw significant steps on our journey to connect better with our tenants, and our learning will be replicated across other services.

The year has not been without its challenges, however. There have been delays to some of last year's actions as we moved from the pandemic into the cost-of-living crisis.

It has been a difficult time for our customers and staff too, so we were delighted to offer some financial support in the form of a Positive Action Fund.

The year ahead will not be without further challenges. Through this plan, we have considered some significant changes to our operating landscape, such as costs of materials, scarcity of labour and contractors and vast inflationary increases.

Although there are material challenges, we remain in a strong position. That is down to our fantastic staff teams and volunteers, whom we couldn't be prouder of, and our gratitude for the support of all our funders, particularly Deloitte and our special relationship with the Varrier Jones Foundation.

As we enter another year, we know that with our incredible team we will continue to deliver outstanding services to improve the lives of disabled people.



Brian Stewart OBE
Chair
Sarah Miller
Chief Executive



Our strategy: To deliver good quality homes, jobs and services that enable our customers to achieve their aspirations

Our vision:

For disabled people to be seen for who they are



- Embed a customer focused culture based on kindness, openness and Papworth Trust values
- Implement our centralised customer engagement strategy to improve communication whilst monitoring and measuring our impact
- Learn from our customers to shape our services and our offer
- Provide joined up services for customers and signposting information

Our mission:

For disabled people to have equality, choice and independence



- Invest in and develop our people, embracing equality, diversity and inclusion
- Invest in our processes, technology and management information systems to enhance our digital capability and offer
- Develop our net zero strategy
- Ensure our housing management strategy delivers good quality, sustainable homes
- Develop a housing development and commercial property strategy
- Optimise unrestricted funding and partnerships to maximise our impact

Our Values:

- Being fair
- Being responsible for what we do
- Working together
- Being honest
- Respecting you
- Our customer at the heart of what we do



- Increase our brand awareness across the East of England
- Implement our volunteer strategy to enhance our services
- Develop our offering to deliver improved services to more disabled people



- Positively influence our local 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

Our work in numbers

Papworth Trust has supported disabled people's equality, choice and independence for 106 years. Here's an overview of our positive work across Cambridgeshire, Suffolk and Essex for the financial year 2022-23:



672 homes

- 70% offering supported living
- 30% providing general needs homes
- 18% fully wheelchair accessible
- 52% built to an accessible and adaptable standard
- 1.8% of the total value of our housing stock re-invested each year to ensure our homes are enabling places to live
- 98% meeting Decent Homes standards
- 85% of repairs fixed first time

659 individuals supported towards and into employment

- 22 employers supported to be disability confident – 44% of our 3-year target
- 828 customers received support from specialist partners, including skills training, mental health, substance abuse, and homelessness
- Over half of those successfully placed in employment stayed beyond 3 months



3 care services

- These services deliver 191,947 hours of support to 29 supported living customers
- 89.4% of care customers feel they have a say in the way their care is provided
- All our CQC-regulated services are 'Good' or 'Outstanding'



5 Opportunities Without Limits services

- Our Opportunities Without Limits centres provide 241 people with learning disabilities with 47,424 sessions annually. These are designed to reduce isolation, access new activities, teach independent living skills and progress towards employment
- 85% of Opportunities Without Limits customers reviewed their progress in the last 12 months, with 75% progressing towards goals such as accessing new activities, learning independent living skills, and entering employment

250 staff

- One in five has a disability
- 60 active volunteers also help us in our work



8 runners

- Raised an incredible £12,500 at the London Marathon



Knutsford Road development

Having officially opened our housing redevelopment at Knutsford Road, Bassingbourn, in January 2023, we were delighted to welcome our first tenants at the beginning of February. Knutsford Road has been our first housing development project for some time, transforming the redundant property into ten self-contained and accessible flats, each with a garden.



2004
Knutsford Road built



2004-2017
We own and manage the property, with care and support delivered by other organisations



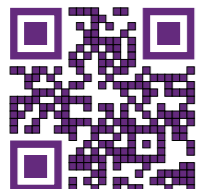
2017
Property becomes vacant



2023
First tenants move in

2022
Building work commences, despite the pandemic causing delays

2017-2019
Our Trustees considered several options and approved re-development



Scan the QR code or click this link to see more:
www.papworthtrust.org.uk/housing/knutsford-road-development/

Values in Practice (VIP) Awards



Our annual VIP Gold Awards recognise staff and thank them for their fantastic work in going above and beyond.



The Gold Award went to Paul Johnson, Service Lead at our care service in Ipswich. Paul has gone over and above to keep a safe service running for customers and staff during COVID outbreaks and helped maintain

social skills for shielding customers by creating pop-up shops. The shops encouraged skills such as patience in queuing, exchange communication, interaction with multiple people, and socialisation.



The Silver Award went to Will Hipwell, an IT Technician. Will fulfilled his ambition to compete on behalf of the GB Boccia team at the Paralympic games in Tokyo. Rather than go off quietly, he saw the games as an opportunity to promote the Trust and boccia amongst disabled people. Will has been a great ambassador and we're extremely grateful he was happy to tell his story this way.



The Bronze Award went to Lesley McNocher, Support Manager of our Work and Health Programme. Beyond her day job, Lesley has been supporting Saxongate Head Office Enabling services, including the Facilities team, the IT team, the HR team, and the Community Connections South team. Her stellar work to ensure Saxongate is accessible for all other services includes going in on days that she should be working from home, or in early so other teams can host meetings.

About the awards: Throughout the year, staff nominate their colleagues for monthly VIP awards, with our Employee Forum voting for the top 3 nominees. Monthly winners progress to the annual awards, with these winners chosen by a panel including members of the Employee Forum, Trustees, customers and volunteers.

Customer focus



Last year we promised this...

- 1** Respond to the needs of our customers, providing support to achieve their aspirations.
- 2** Learn from our customers through engaging and co-producing our services and our offer.
- 3** Measure and monitor the impact our services have on the lives of our customers to learn and improve.
- 4** Co-design service standards and assess our performance against them.

Our progress made...



- Consulted on our customer service standards, so you know what to expect when interacting with us.
- Engaged over 150 tenants at our new coffee and chat mornings; alongside the police, fire service and others to support wellbeing and safety.
- Proactively trialled an inaugural tenant satisfaction survey, with lessons learned from 230 responses helping us to improve.
- Established two employee wellbeing forums, a disabled colleague's group and the carers experience group to improve staff engagement, recruitment processes and internal policies across the Trust.
- Upskilled our tenant scrutiny panel to conduct their first review on 'reporting a repair'. The panel proposed 14 recommendations and supported us in devising an improvement plan. Read more in the case study opposite.

Our actions for 2023/24...

- Embed a customer-focused culture based on kindness, openness and Papworth Trust values.
- Implement our customer engagement strategy to improve communication, and monitor and measure its impact.
- Continue to learn from customers to shape and improve our services and offering.
- Provide joined-up services for customers alongside signposting information.

Expected results and outcomes...

- Building on the good work of our tenant engagement, our flexible network of customer forums will be embedded across all services, listening to our customers and shaping our offer.
- Wherever you interact with us, you will receive a consistent level of service because of our customer service standards and ongoing staff training.
- A greater understanding of how you want to be communicated with and new tools to ensure effective and consistent communications.
- Centralised customer engagement means we're better equipped to share your feedback and create best practice across all our business areas.
- You can seamlessly navigate our services or be successfully signposted externally for further help and support.

Case study: Tenant scrutiny panel

'This year, our tenant Scrutiny Panel undertook its first review on 'reporting a repair at Papworth Trust', which included:

- TPAS tenant engagement training on how to undertake scrutiny reviews.
- Various activities to test the service standards, including a review of our policies, website, and social media messaging.
- Mystery shopping to report repairs using various methods, such as by phone and email, to understand response times.
- Meetings with key people across the Trust.
- A set of 14 recommendations were agreed upon and taken forward into an improvement action plan.

"Believing I can make a difference gives me the confidence to speak up. It shows tenants do have a voice and are listened to. We are looking forward to carrying out more of these in-depth reviews in the future and will continue to use these to help make improvements on behalf of tenants."

Linda Moss
Chair of tenant scrutiny panel



Sustainability



Last year we promised this...

- 1** Invest in our people, processes and technology to provide a progressive and inclusive work environment.
- 2** Use our asset management and net zero strategies to drive sustainability, whilst optimising our assets in accordance with our long-term financing plan.
- 3** Build on our strategic relationship with Varrier-Jones Foundation and broaden our approach to unrestricted funding.
- 4** Develop our management information strategy to support effective decision making and performance monitoring.

Our progress made...

- Achieved our Cyber Essentials accreditation, meeting security best practices which will facilitate current and future Government funded opportunities.
- Engaged with staff through two new employee forums, so their voice is heard and they feel empowered to bring about change.
- Provided two one-off cost-of-living payments and set up a Positive Action Fund, supporting 33 staff and 46 customers with rising living costs.
- Negotiated positive funding uplifts to help alleviate some of the immediate financial pressures on our Care services.
- Enjoyed more open discussions with the Varrier-Jones Foundation (VJF) to develop sustainable joint-working that supports their investments and our future needs. We have also separated VJF's IT infrastructure from our own without jeopardising security.
- Commenced our journey towards net zero with internal workshops supported by Deloitte and trialled air source heat pumps in six homes and at our new Knutsford Road development.

Our actions for 2023/24...

- Invest in and develop our people, embracing equality, diversity and inclusion.
- Invest in our processes, technology and management information systems to enhance our digital capability and offer.
- Develop our net zero strategy to reduce our carbon footprint.
- Ensure our housing strategy delivers good quality, sustainable homes.
- Develop a housing development and commercial property strategy.
- Optimise funding and partnerships to maximise our impact.

Expected results and outcomes...

- A well-motivated and rewarded workforce that is mission and values-led and impact and outcomes-focused.
- Staff supported to reach their full potential with effective workforce planning delivering the right business decisions.
- We will have investigated how customers can digitally interact with us. Electronic Care rostering and Care management software will be embedded, and housing software transitioned to the cloud.
- A strengthened health and safety ethos maintains our safe working environment.
- Further work towards our property portfolio being sustainable for our future needs, taking into consideration operating costs, net zero requirements and embracing advances in technology.

Case study: Air source heat pumps

Over the last year, we have been trialling air source heat pumps (ASHPs) with six households, five of whom have a disabled person living within the home. The results so far have been encouraging. Overall, tenants are happy with the new systems, and lessons are being learned to support future tenants to embrace this new technology.

The temperatures set by tenants varied between 19 and 22 degrees, meaning houses were warm with no hot water issues.

ASHPs were installed at our new Knutsford Road development, and we continue to learn from tenants about how they work for them and the improvements that can be made.

“Our air source heat pump trial is about reducing our reliance on gas and oil boilers to provide heating and hot water to our rented homes. Starting with a small trial allows us to learn and understand whether and how these heat pumps work for our tenants, including informing any future rollout plans and allowing more tenants to embrace new technologies.”

Helena Harris
Director of Operations



Photo credit: Simon Watson Photography

Grow our impact



Last year we promised this...

- 1** Develop and invest in our approach to innovation.
- 2** Enhance our relationship management and strategic partnerships to maximise opportunities for disabled people.
- 3** Develop and integrate Information, Advice and Guidance, Transition and Befriending into existing core service delivery.
- 4** Implement our volunteer strategy to enhance the value of our services.

Our progress made...

Developed vital strategic relationships and we are delighted to have:

- Secured a further 3-year partnership with Deloitte.
- Delivered additional arts, drama, environmental and healthy living customer sessions at Opportunities Without Limits. These have been enabled through support from Arts Council Lets Create Jubilee Fund, Together For Our Planet Fund, Billie Box and SEN Legal and our generous individual donors .
- Provided 154 bikes to Ukrainian refugees thanks to our partnership with South Cambridgeshire District Council.

- Welcomed 133 corporate volunteers, helping us with decorating, gardening, localised moves, and supporting staff to develop new skills.
- Upskilled staff to signpost customers to the right place, no matter where they live in the region. To do this, we merged our information, advice and guidance across the organisation into a central resource.
- Refreshed Opportunities Without Limits service model and began delivering two new employment programmes – Routeways to Work and Positive Steps. As part of this, we reviewed policies to include younger disabled people supported by Routeways to Work through training at OWL Bikes.

Our actions for 2023/24...

- Increase our brand awareness across the East of England.
- Implement our volunteer strategy.
- Develop our offering to deliver more services to more disabled people.



Expected results and outcomes...

- Existing services will continue to improve and grow to secure their future sustainability. You will see us deliver quality homes in the right geographical location, secure future funding for existing employment programmes, and continually evolve our offer to suit the labour market. We will also seek improved funding for social care and further embed our revised delivery model for Opportunities Without Limits.
- Increased awareness of who we are and being clear about our offer and the impact we make is critical, recognising that others also benefit from helping us in our work.
- Greater volunteer engagement will provide added customer value and bring expertise and experience to our teams.

Case study: Positive Steps

To ensure disabled people get the support they need to begin their journey into work, Positive Steps launched in June 2022. The project supported people to improve their physical and mental well-being in preparation for returning to employment.

The project is delivered in partnership with Able2B and Living Sport and runs for 12 weeks at a time, with each 12-week session supporting groups of up to 15 people.

Danella participated in our Positive Steps programme. She had worked as a carer in the community for over six years before giving this up to care for her elderly parents. During her career break, she developed frozen shoulders, meaning she could not return to her caring profession. She joined Papworth Trust on our Work and Health Programme, where her advisor enrolled her on the Positive Steps programme.

Danella said: **“The Positive Steps programme has reignited my enthusiasm for exercise. Being trained by a former British and European boxing champion is something I never thought was possible. This has led to my left shoulder improving significantly and the meetings with my fellow participants are slowly building my confidence in my day-to-day life.”**



Rachael Hutchinson and Jon Thaxton from Able2B

External influence

Last year we promised this...

- 1** Positively influence communities and national policy to meet the needs of disabled people.
- 2** Use our Disability Confident leadership status and expertise to maximise opportunities for disabled people.
- 3** Engage with Papworth Everard tenants and the wider community to enhance our relationships and our role in the village.

Our progress made...



- Responded to five Government consultations, set up a new policy hub area on our website and spoke to our Local MPs about rising energy prices, the cost of living and the funding crisis affecting adult social care providers.
- As well as our own work, we partnered with national umbrella organisations to push for fairer policy outcomes for disabled people, including the National Housing Federation and Shaping the Future of Volunteering. Held events in Papworth Everard village to celebrate Queen Elizabeth II's platinum jubilee, as well as more informal drop-in sessions where tenants can talk to a member of our Executive team about any housing issues.
- Engaged with 22 organisations helping them to become Disability Confident through personalised advice and guidance, lunchtime learning sessions and online resources. Read more about Disability Confident opposite.



Our actions for 2023/24...

- Positively influence our local 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.



Expected results and outcomes...

- New homes are developed with accessible design in mind, while employment support programmes are accessible and fully support disabled people into work.
- We want to see increases in Government funding for the social care sector and fairer pay for our workforce.
- Our people are collectively responsible for leveraging our work through their networks, seeking opportunities to benefit disabled people and the Trust.
- A database of statistics and impact case studies is available to inform and influence key policy areas.
- A further fifty organisations are supported to become Disability Confident employers.
- There will be greater social interactions with Papworth Everard residents and stakeholders, further developing our relationship with them.

Case study: Disability Confident

At the beginning of November 2022, we visited the Institute of Engineering and Technology (IET) to talk to them about disability awareness and becoming disability confident.

Working with the Department for Work and Pensions, we are now registered as a Disability Confident validator, meaning we can support organisations to achieve Disability Confident level 3 leadership status. We are pleased to be supporting our first organisation through this level 3 validation process. Sarah Sinclair from the IET said:

"The presentation was nicely structured, inclusive, and very engaging. Parts of the presentation included an interactive section which was welcomed by the team. The speakers were engaging and set the tone of the presentation at the correct pitch. If you get the opportunity to attend one of these presentations, please do as they are very useful."



Stefani McNocher and Fleur Patten promoting Disability Confident

Financial overview

Income and expenditure summary 2023-2026

£'000s

Income

Housing	5,227	5,336	5,454
Care	4,323	4,539	4,766
Work	628	593	396
Opportunities Without Limits	1,486	1,585	1,677
Other Income	2,128	2,085	2,095

Total income

	2023-24 Budget	2024-25 Plan	2025-26 Plan
13,793	14,138	14,387	

Expenditure

Housing	(4,942)	(4,875)	(4,811)
Care	(4,634)	(4,817)	(5,031)
Work	(685)	(645)	(464)
Opportunities Without Limits	(1,647)	(1,669)	(1,709)
Other expenditure	(919)	(841)	(860)

Total expenditure

(12,827)	(12,847)	(12,874)
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Surplus

Housing	285	461	643
Care	(311)	(278)	(265)
Work	(57)	(53)	(68)
Opportunities Without Limits	(161)	(84)	(32)
Other Surplus	1,210	1,245	1,235

Total Operating Surplus

965	1,291	1,513
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Interest payable	(569)	(569)	(569)
SHPS pension operating cost	(157)	(160)	(164)
Investment in systems/digitalisation	0	(100)	(200)

Total Operating Surplus

239	462	580
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Balance sheet and cash flow

The balance sheet asset base sees some growth over the period as we add to our housing assets via component replacements, along with the introduction of a small number of new housing units, and our liabilities decrease due to the scheduled repayment of elements of our loan portfolio, as well as paying down the defined benefit pensions liability.

We have significant capital expenditure of over £6m identified over the course of the plan, though we will need to put in place an element of refinancing to support this, and the liability repayments identified above, for which the organisation has capacity.

Key balance sheet and cash flow metrics:

- Housing properties growth from **£38.6m** to **£39.8m**
- Pension deficit liabilities reduced to **£259k** by end of plan
- General reserves expected to reduce to **£4.8m**, but still within target range
- Total assets forecast to grow to **£28m**
- Cash investment of ~ **£4m** over the life of the plan

Notes on our income and expenditure:

The general economic landscape has tightened, and inflationary cost pressures and rising interest rates have adversely impacted our projections, though we are still forecasting modest surpluses. The level of activity is forecast to remain broadly consistent over the course of the plan, though we will explore growth opportunities organically or in collaboration with partner organisations.

The projections opposite reflect the ending of several of the work programmes currently being delivered. However, we will continue to seek to improve the employment prospects for disabled people, utilising our Disability Confident Leader status to do so along with fundraising to create sustainable employment support for disabled people. The projections also reflect the continuing financial pressures in social care, which we have not forecast to be resolved in this plan.



Key risks and sensitivities



Key Risk 1:

Varrier Jones Foundation are not able to maintain the current level of donation

- A level of unrestricted income is essential for the Trust to deliver planned services, and continued funding is assumed
- A 10% reduction to the funding planned would adversely impact the Trust by £450k over the course of the Plan
- Any reduction will increase the level of financing required

Response to risk:

- Further review of planned operational delivery to be undertaken to potentially rationalise services
- Utilisation of investment funds to meet capital requirement

Key Risk 2:

Social Housing Pension Scheme deficit liability doesn't reduce

- Expected payments of £2.1m against this liability over the plan period
- Next valuation Sept 2023, potential range of £200k p.a. either way for future payments

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 cost increases

- The costs of delivery in Care are principally driven by pay costs. Increased wage pressures, with the National Living Wage now at £10.42 per hour, challenges economic viability
- An additional £1 / hr in pay rates costs more than £200k per year
- 1% shortfall in funding results in £145k shortfall over the life of the plan

Response to risk:

- Our services are now focussed in Suffolk and we continue to build on our good relationship with Suffolk County Council to maintain an effective, viable service

Key Risk 4:

Material weakening of investment markets

- Exposure via our own held portfolio and the assets held as investments in the SHPS scheme
- Material devaluation affects balance sheet and general reserves, ultimately impacting cash available and cash required
- Potential impact on general reserves and the ability of these to meet the requirements of our reserves policy

Response to risk:

- Investments are held in well-diversified funds via experienced fund managers, with whom we meet regularly, revising investment strategies and approach where necessary

Key Risk 5:

Inflation / interest rate rises

- Continued high levels of inflation, or further rises in interest rates, would adversely impact the Trust
- 0.5% increase in base rates impacts by £20k p.a.
- 1% increase in inflation impacts by about £45k p.a.

Response to risk:

- Potentially fix more of our loan portfolio, albeit at rates above our current weighted average cost of capital, to reduce interest rate uncertainty
- Inflation more challenging as we are not generally free to set our prices, therefore need to minimise / reduce expenditure in the short term before renegotiations with commissioners over pricing



Supporting disabled people to be seen for who they are.



01480 357200



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