



# Business Plan 2020-2023



Supporting disabled people to have  
equality, choice and independence



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# 1. Introduction from CEO

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As we enter a new decade, we are striving to build on our history of delivering good quality housing, work and care services for disabled people. Our customers are at the heart of everything we do, so that we can truly deliver person-centred services.

We recognise the external challenges ahead and have worked hard on strengthening our resilience to manage the future uncertainty.

Under the leadership of our new Chair, Brian Stewart, Papworth Trust has modernised our ways of working to be more flexible; locating ourselves closer to our customers makes us very excited about our future and what it holds for us.

The 2020/21 Business Plan highlights how we are developing our core areas of operation through growth and improving quality. In housing we are an early adopter for the new Together with Tenants Charter. We are also developing our asset management strategy to support more informed strategic decision making in the future, with the long term aim of building more accessible homes.

The work we do to support disabled people into employment is exemplary and we want to reach more people, as we are acutely aware of the positive impact having a job can have on a person's mental and physical wellbeing.

We deliver high quality care services for customers with complex needs and are proud to have achieved an accreditation of 'Outstanding' from the regulator. However, the financial challenges of social care impact on us significantly and whilst our work on care efficiencies has improved this situation, our ambition for the future is growth and increasing sustainability.






Finally, our Opportunities Without Limits model integrates customers into their local community whilst promoting the development of skills, opportunities for employment and social inclusion. Constant innovation and engagement is important to ensure that the service continues to meet customer needs.

We are ambitious and excited about our future, working with our customers and our excellent workforce and volunteers we will DELIVER great services and homes to more disabled people.

**Sarah Miller, Chief Executive**



## 2. What we achieved in 2019-20

Strategic Priority	Achieved?
 <b>Housing</b> Maximise performance of our housing stock Agree a Retention and Disposal strategy Review approach to general needs housing and housing maintenance/management Create a Housing Development strategy	   
 <b>Employment</b> Optimise performance during the wind-down of legacy contracts Maximise performance and minimise risk within our current contracts Develop long term and local strategic relationships Develop innovative and agile ways of working that will give us a strategic advantage across multiple funding streams and customer groups	   
 <b>Care</b> Exit the remainder of our low levels of care services in Suffolk Maximise our performance, streamlining our processes and systems to make our complex care services both financially sustainable and of good quality	 
 <b>Day Services</b> Maximise outcomes for existing and new customers in the most efficient way Test new models of delivery for community, employment and respite models, identifying key success criteria Rationalise the way our day services are delivered, recognising that, in the future, not all services will need to be delivered from buildings	  
 <b>Engagement</b> Have the right processes in place to ensure our customers and their supporters have a voice in the planning, delivery and evaluation of all the services and support we provide	
 <b>Enabling</b> We will review and redesign the support services of the organisation to provide efficient and effective delivery, reducing costs and increasing the flexibility of support, aiming to improve the effectiveness of service delivery.	
 <b>Financing Plan</b> Develop a comprehensive funding plan, which will include a number of strategic asset sales, review and reconfiguration of our commercial asset portfolio and working with our sister charity, the Varrier-Jones Foundation, to establish the most effective support for the Trust to continue to deliver its mission	
 <b>People</b> Develop our employee engagement strategy Offer an overall package that provides support to fulfil roles and opportunity to develop skills and competencies to enable people to progress within the organisation Retain our commitment to equality and diversity in all that we do	  

## 2.1 Our successes in 2019/20

1 Papworth Trust successfully gained accreditation as a **Disability Confident Leader** (one of only 244 organisations nationally to hold this award).



2 Successful **relaunch of our 'Opportunities Without Limits'** service; reducing our reliance on our own buildings so that we can work in partnership with others and ensure that our customers are supported to engage with a wider variety of local activities.

3 **Continuation and expansion of First Steps to Success**, our bespoke employment support offer for people with learning disabilities and autism. We are delighted that corporate partners and funders recognise the value of this programme. We have secured funding to develop it further in Suffolk and Cambridgeshire.

4 Our **Opportunities Without Limits service in Basildon** was **recognised with two local awards**; winning 'Disability Group of the Year' at the Southend United Community Team awards and also recognised as one of 70 'Basildon heroes' as part of Basildon New Town's 70th Anniversary!



5 The Trust's back office departments were successfully **moved into a new community hub in Huntingdon**, with no disruption to our customers there. This move allows the Trust to maximise office space and the services that we provide to customers

6 We **appointed a new Chair of the Board of Trustees** this year, following Rob Hammond's departure. Brian Stewart joins the Trust, bringing with him a wealth of expertise in local government, housing and the NHS

7 Our **fundraising appeals to achieve full funding** included a new accessible minibus in Cambridge, an accessible training kitchen in Basildon and the launch of First Steps to Success in Cambridgeshire. Thank you to our supporters and funders for their efforts and generosity.

## 2.2 The impact we have made

### Building Better Opportunities Community Connections South, supported Phillipa to start her own business

"I first heard about Building Better Opportunities (BBO) Community Connections South, through a friend who worked at a local social enterprise. I have complex pain and peripheral circulation conditions and, as a result, I have had to use a wheelchair for the past six years.

I am interested in a dog training method called concept training. I wanted to look at ways of developing this into a meaningful activity because I know that being around and working with dogs brings me great joy and improves my general sense of wellbeing. I had an idea of starting a not-for-profit dog training business and was looking for advice and support to make this happen.

With my BBO Community Connections South advisor, we looked at business planning, lesson planning, marketing and finding a suitable venue for classes to take place. They also helped me find funding for a new wheelchair which included a drawer for dog treats and poles that I could attach leads to.

Now I have a new sense of purpose. I have a small business teaching and training and I have a wheelchair that has opened up areas of my local community that were off limits to me.

I have gone from just living a life to loving the life I live."

Community Connections South is funded by The European Social Fund and The National Lottery Community Fund.







## How we helped Katie to build her confidence and independence

Katie was supported by our Cambridge team with progressive travel training leading up to Christmas. The initial approach taken was to accompany Katie on every part of every journey. By Christmas Eve her Support Worker was able to just meet Katie at the bus stop and then accompany her, walking some distance behind as agreed, to the centre on foot.

Through our support, Katie grew in confidence and independence. Over such a short space of time she felt able to reduce her dependence on staff and empowered to meet her goal of travelling independently.

Katie's confidence is now high and she is able to carry out the journey on her own at all times.

# 3 Vision, Mission, Values

During 2019 – 20 we spent several months consulting with our customers, staff and volunteer teams on what they felt Papworth Trust's values were and how they could be worded in a manner that was accessible and meaningful.

The end result was broken into two key areas of focus on customers:

1. We will support you to...
2. We will work with you by...

We are proud to share with you our Vision, Mission and Values:

## Vision

Our Vision is for a world where disabled people are seen for who they are.

## Mission

Our mission is to support disabled people to have equality, choice and independence.





## 4 The Trust

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Papworth Trust's mission to support disabled people to have equality, choice and independence is as strong today as it was when the charity was founded 103 years ago. Our focus always has and always will be on four key aspects of a person's life; housing, employment, care and leisure opportunities. Each of these areas is integral to the wellbeing and needs of disabled people and we are passionate about our customers being at the centre of everything we do.

# 4.1 Housing



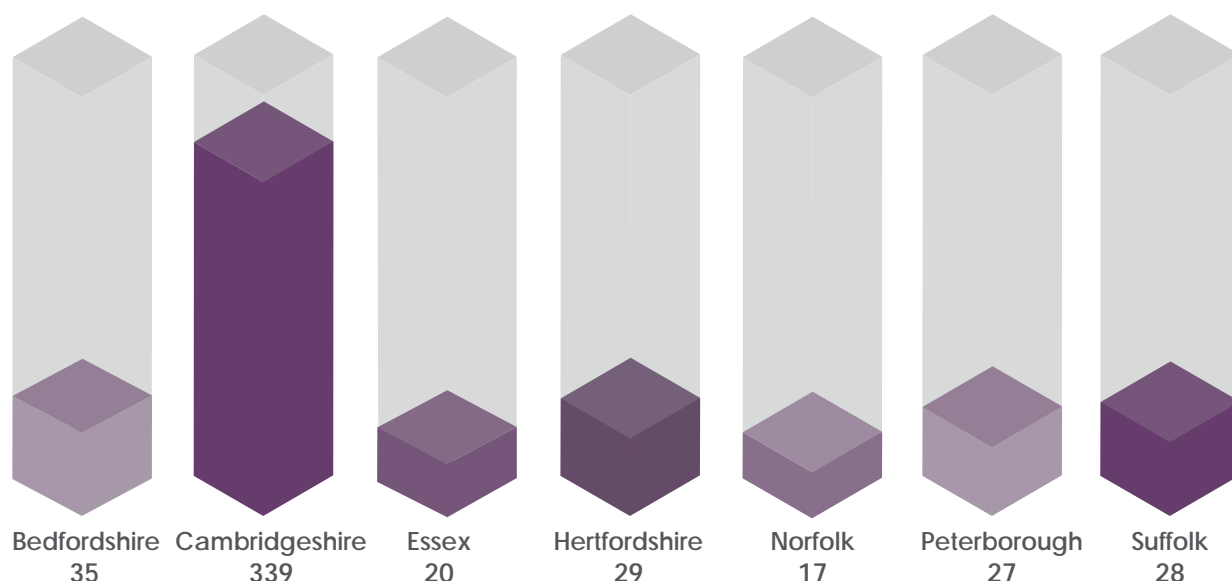
We provide **668** safe, enabling and accessible homes for tenants.

We have **173** general needs properties in Cambridgeshire.

We have **495** supported living properties across the East of England.

We developed **3** desperately needed new housing units for disabled people this year.

## Supported Living Units





## 4.2 Work



We have supported over **1,000** people this year to search for, secure and sustain employment.

We have worked with **531** people this year on Work and Health programme.

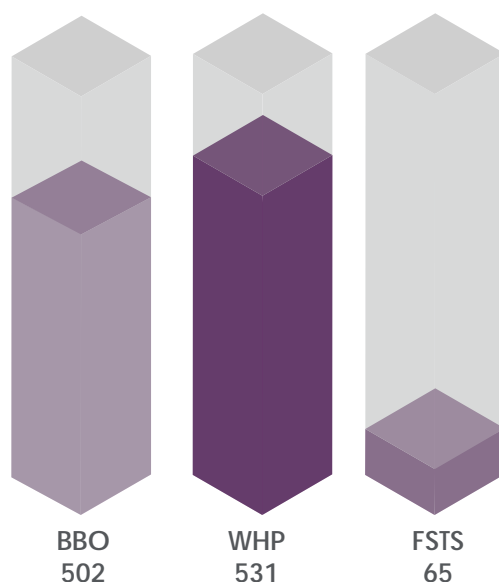
The BBO project has engaged with **502** participants across Cambridgeshire and Essex.

Our new, bespoke employment pathway for people with Learning Disabilities, First Steps to Success supported its first **4** people into paid work!

We're delighted that all **4** people are still working today.

Overall we have supported **65** people on First Steps to Success.

### Customers Supported By Employment Pathway 2019/20





## 4.3 Care



The Trust has delivered over **165,000 hours** of support this year in supported living settings across Suffolk and Cambridgeshire.

We are delighted that the quality of our delivery is recognised by the Care Quality Commission; two of our services are judged to be 'Good', with the third 'Outstanding' – only 4% of services are rated 'Outstanding' nationally!

### Contracted hours of day-time care delivered by site, per week





## 4.4 Opportunities Without Limits

We have **312** customers attending over **1,100** sessions every week, over **6** sites. Our customers learn new skills, reduce feelings of isolation and increase their independence.

Our programme of modernisation has progressed significantly this year; through re-branding the services, launching new projects to tackle social isolation, opening in the evenings and succeeding with several capital fundraising projects.

Number of customers per service



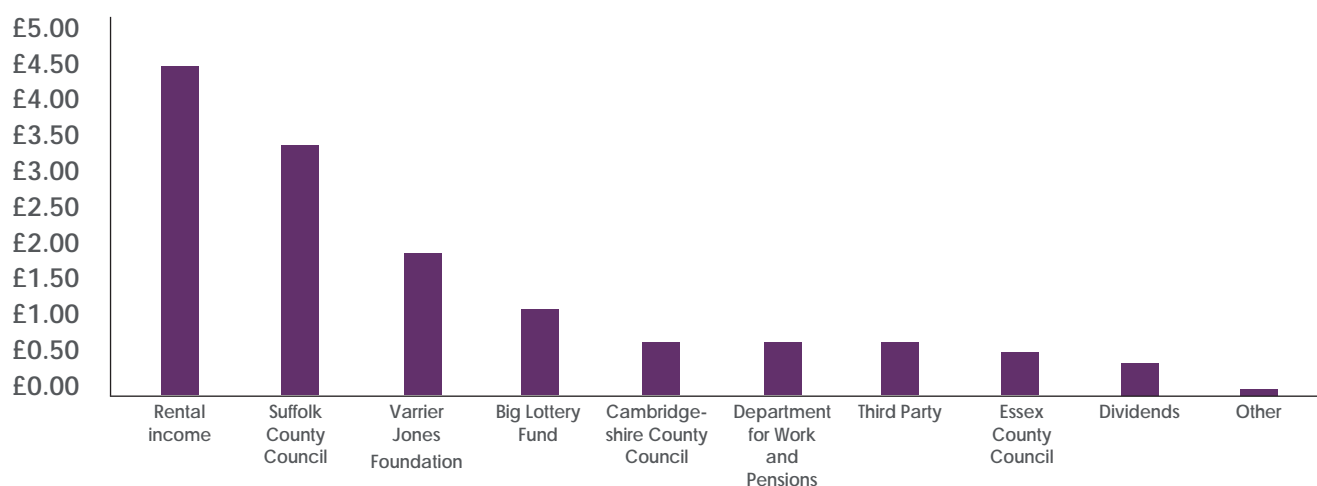
Number of weekly sessions



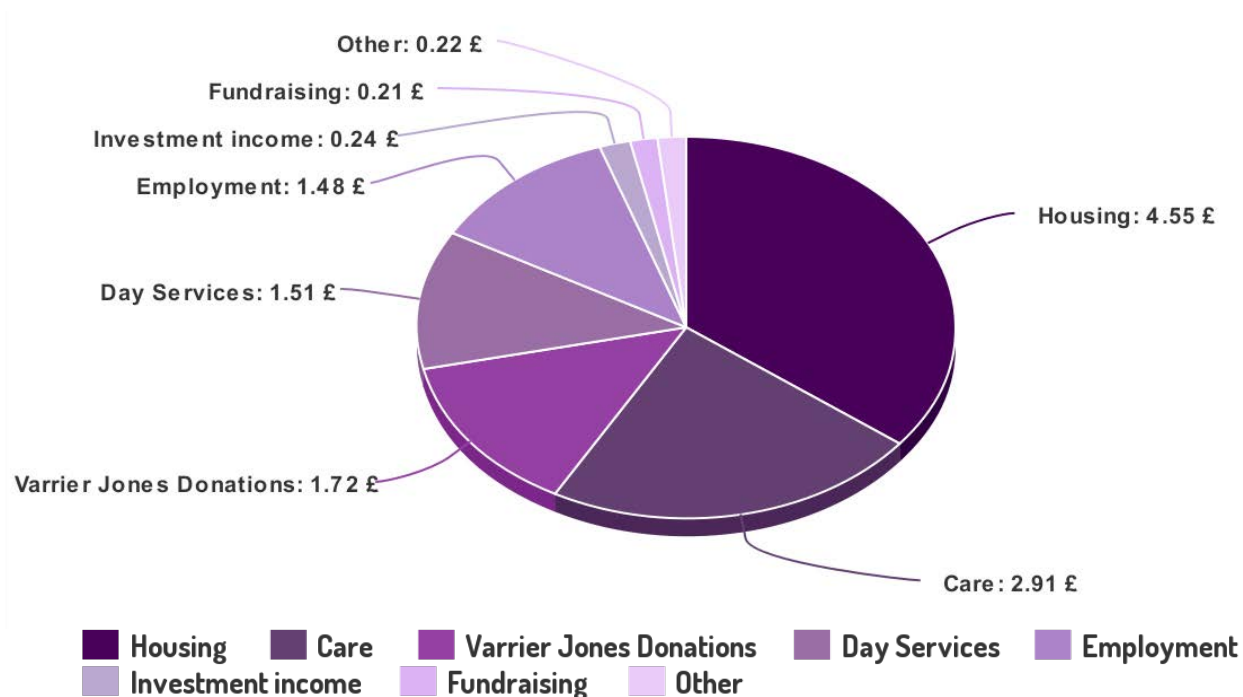
# Financial Summary

Papworth Trust's turnover for the current year, 2019/20 is forecast as £12.84m, which represents a small overall reduction from 2018/19 (£13m). Due to the breadth of services that the Trust offers, revenue is split across a variety of funders, albeit there is a strong reliance on rental income from the Trust's property portfolio, as well as funding via our Local Authority partners for statutory social care delivery.

## Income by Funder (£m)



## Income by Service (£m)





## 5. Our Strategic Principles & Priorities

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We have developed the following 3 year strategic principles which will drive the organisation forward.

We will...

**D**eliver Sustainable Growth with Purpose

**E**fficiently and Effectively provide great services

**L**ead Meaningful Engagement, Striving for Co-Production

**I**nfluence disability policy, rights and opportunities

**V**alue our heritage whilst developing our culture

**E**ngage with others to learn and innovate

**R**etain and develop a high quality workforce

...for our customers

These broad Strategic Principles are broken down into the priorities listed in the table on the next page; identified as the activity that is required across the years 2020 – 23.

Further detail as to the activity that will be prioritised by the Trust is given in section 5.1. Each Strategic Principle has a senior member of staff leading the activities with a sponsor from the Leadership Team (see Appendix 2 for list of leads and sponsors). Action Plans identify the key milestones and measures against which progress will be judged. Performance against these Strategic Principles is monitored on a quarterly basis by the Management, Leadership team and the Board of Trustees (see Appendix 1 for governance structure).

## Vision & Mission

**Our Vision is**  
for a world  
where  
disabled  
people are  
seen for who  
they are

**Our mission**  
is to support  
disabled  
people to  
have equality,  
choice and  
independence



## Strategic Principles

**Deliver sustainable**  
growth with purpose

**Efficient and**  
effective delivery  
of great services

**Lead meaningful**  
engagement, striving  
for co-production

**Influence disability**  
policy, rights and  
opportunities

**Value heritage**  
while developing  
culture

**Engage with**  
others to learn and  
innovate

**Retain and develop**  
a high quality  
workforce

## Strategic Principles – Objectives

- Reach a sustainable financial position in Care
- Continue to modernise and grow 'OWL' services
- Service unmet need of people for employment support
- Maximise our assets

- Develop departmental plans for all areas
- Develop a revised cost allocation framework
- Deliver a revised quality assurance strategy
- Re-establish our organisational standards
- Develop and deliver a financing strategy

- Clearly articulate a definition of 'Meaningful Engagement'
- Roll out our engagement strategy
- Continue to develop Together with Tenants with the National Housing Foundation

- Implement our communications strategy
- Develop consistent communication tools
- Continue to develop and implement stakeholder engagement tools

- Progress our cultural change
- Build on our heritage

- Develop a Corporate Social Responsibility strategy
- Develop a Management Information Systems strategy
- Embed a culture of innovation and learning

- Develop the on-boarding process
- Develop and implement a Reward & Recognition strategy
- Develop and implement an internal communications strategy

# 6. Financials

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## Overview

The table on the following page, outlines the three year planned financial performance over the course of this Business Plan. This reflects the activities described in the strategic principles above and are articulated under the four primary work streams. The three year plan reflects a consolidated financial position, building on the current year performance, with strong operating surpluses being yielded and controls being maintained over central costs, generating strong financial returns throughout the plan.

Total revenue over the period of the Plan remains largely consistent, with some growth in core income streams; in particular housing and care, offset by a reduction in income from work, as we come to the end of key grant funding sources. Expenditure rates remain largely in-line with income, delivering a plan that has relatively modest levels of volatility. Growth plans for existing services streams are relatively modest and represent achievable growth in the current markets for these services.

The plan recognises the challenging external environment, in particular in social care environments, with income constraints for Local Authorities, and cost pressures around the national living wage, continuing to put pressure on financial performance. Mitigating plans include some targeted growth to increase critical mass and yield some economies of scale, as well as a continued focus on eliminating or reducing costs where possible.

There is an ongoing requirement to invest in the Trust's assets, in particular our housing portfolio, and significant investment in replacement components over the life of the plan is anticipated. In addition to this, the currently void stock at Knutsford Road will require a major capital investment in order to bring ten additional units into use. There are no significant further housing capital investments currently included within the Business Plan, although there is some provision included to explore potential development opportunities, and any such activity will be subject to the demonstration of a clear business case.

We continue to seek to dispose of obsolete assets within our portfolio to generate the necessary funds to support the plan. A number of assets are actively being pursued for disposal, though the forecast for the likely proceeds from these has been downgraded in this plan, reflecting



the challenges in securing suitable planning outcomes and the difficult development environment for small projects.

In addition elements of new loan finance will be sought to support the development plans outlined and to provide an element of refinancing against existing loans, in order to provide some contingency against the capital receipts anticipated.

## Income and Expenditure Summary

£'000s	2020-21 Budget	2021-22 Plan	2022-23 Plan
<b>Income</b>			
Housing	4,547	4,706	4,844
Work	1,510	1,330	557
Care	2,989	3,505	3,871
Opportunities Without Limits	1,510	1,591	1,672
<b>Total Operations Income</b>	<b>10,556</b>	<b>11,132</b>	<b>10,943</b>
Fundraising	211	220	230
Varrier-Jones Foundation Donation	1,720	1,754	1,790
Enabling	191	170	170
Investment income	240	240	240
<b>Total Income</b>	<b>12,918</b>	<b>13,516</b>	<b>13,373</b>
<b>Expenditure</b>			
Housing	(3,766)	(3,891)	(3,926)
Work	(1,556)	(1,325)	(756)
Care	(3,173)	(3,591)	(3,982)
Opportunities Without Limits	(1,493)	(1,568)	(1,646)
<b>Total Operations Expenditure</b>	<b>(9,988)</b>	<b>(10,374)</b>	<b>(10,311)</b>
Fundraising	(201)	(210)	(220)
Investment management costs	(38)	(40)	(40)
<b>Enabling Expenditure</b>	<b>-</b>	<b>-</b>	<b>-</b>
Gross Enabling Costs (incl Facilities)	(2,872)	(2,977)	(3,025)
Total recharges/recovery	1,744	1,851	1,864
<b>Net Enabling Expenditure</b>	<b>(1,128)</b>	<b>(1,126)</b>	<b>(1,161)</b>
Budget provision for pay increase	(89)	-	-
<b>Total Expenditure</b>	<b>(11,444)</b>	<b>(11,750)</b>	<b>(11,732)</b>
<b>Surplus</b>			
Housing	781	815	918
Work	(46)	5	(199)
Care	(184)	(86)	(112)
Opportunities Without Limits	17	23	26
<b>Total Operations Surplus</b>	<b>568</b>	<b>758</b>	<b>633</b>
Fundraising	10	10	10
Varrier-Jones Foundation Donation	1,720	1,754	1,790
Enabling	(937)	(956)	(991)
Investment income	202	200	200
Budget provision for pay increase	(89)	-	-
<b>Total Operating Surplus</b>	<b>1,474</b>	<b>1,767</b>	<b>1,642</b>
Interest payable	(490)	(490)	(455)
SHPS pension accrual	(155)	(154)	(154)
<b>Total Surplus</b>	<b>829</b>	<b>1,123</b>	<b>1,033</b>

## 8. Conclusion

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This Business Plan identifies the changes that we need to make, but also where we need to continue what we are doing in a bigger or better way. It is a very interesting time for housing, work and social care, with so many challenges ahead. With a lack of Government funding and Brexit dominating every agenda for the last three years, these areas have suffered from diminished Government focus and direction. We are hopeful that our work, and the needs of disabled people will be a priority for those in Whitehall, and those in Local Authorities going forward.

We will endeavour to continue to champion the rights of disabled people, whilst delivering good quality housing, work and care against the uncertain backdrop.

Thank you to all the customers, staff and volunteers who make Papworth Trust such a great place to work.