



# Business Plan 2024-27

Supporting disabled people to have equality, choice and independence







# Introduction



We are thrilled to share our 2024-27 Business Plan. This details how we will work towards our organisational strategy: **to deliver great quality homes, jobs and services that enable our customers to achieve their aspirations.**

Set in 2022, our Strategic Objectives are **Customer Focus, Sustainability, Grow our Impact** and **External Influence**. Below these high-level objectives sit many detailed activities that we will be undertaking during 2024 – 25 to achieve our strategy.

programme and achieving Cyber Essentials Plus accreditation showing our commitment to digital security.

Increased costs, funding restraints, shortages of contractors and materials along with continuous demand for homes and services are some of the ongoing challenges we face. But with over 100 years' experience in delivering high quality services, the Trust has the resilience to weather turbulent times. We don't underestimate how these challenges impact disabled people and our ability to provide great quality homes and services. We have continued to offer financial support through our Positive Action Fund and have provided more laptops to customers and staff donated by Deloitte. With the wonderful help of volunteers, we have supported our local communities in need through our inaugural shoebox appeal.

We will continue to drive positive change in 2024-25, focusing on customer engagement through our Experts by Experience, Tenant Scrutiny Panel and quarterly customer feedback weeks. This will help shape our service delivery and enable us to learn from our customers what we're doing well and where we need to improve.

We continue to invest in our people to ensure we have the right values and skills to meet the needs of our customers. We are increasing the use of technology to help our colleagues work more efficiently, with more time to dedicate to our customers. Better technology also enables our customers to live more independently.

Everything we've achieved this year is thanks to the amazing work of our colleagues and volunteers and the generosity of our supporters such as the Varrier-Jones Foundation and Deloitte. We are so grateful for your support. Thank you so much.

We have seen some great achievements across the Trust during 2023-24. Just a few examples include welcoming tenants to our new housing at Knutsford Road in Bassingbourn, supporting people on their journey to find work through the new Pioneer

**Brian Stewart OBE, Chair, and Sarah Miller, Chief Executive**

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# Overview of the organisation



Papworth Trust has supported disabled people's equality, choice and independence for 107 years. We're making a positive impact across Cambridgeshire, Suffolk and Essex through our:

## 672 homes



Our homes across the East of England enable people to live as independently as possible.

- 74% offering supported living
- 26% providing general needs homes
- 18% fully wheelchair accessible
- 52% are built to an accessible and adaptable standard

## 561 individuals supported towards and into employment

- we supported 50 employers to be Disability Confident
- 1,397 customers have received support from specialist partners. This included skills training, support around visual and hearing impairment and help for customers experiencing poor mental health, substance abuse or homelessness
- more than half of the customers we've successfully placed into employment have managed to sustain their roles beyond three months (135 out of 217)

## 3 Care services Fundraisers

- which have delivered 195,000 hours of support to 31 supported living customers
- all our Care Quality Commission regulated services are rated as 'Good' or 'Outstanding'

## 5 Day Opportunities centres

- which provided 244 people with learning disabilities with 54,100 sessions. These reduce isolation, help people to take part in new activities and learn independent living skills.



## 235 Staff

- one in five of whom have a disability

## 63 Volunteers

- contributing on average 20 hours a month

- including seven London Marathon runners who raised an incredible £13,000



## 66 Shoeboxes

- gifted to local charities. As part of The Big Help Out, we asked our local communities to donate a variety of items that would fit in a shoebox.
- volunteers and our customers then packed the shoeboxes and gave them to charities supporting people experiencing homelessness, domestic violence or food poverty.





# Spotlight on Routeways to Work



Routeways to Work supports young people aged 16 – 25 with learning disabilities, autism and/or neurodiversity by preparing them for employment. The project provides tailored, practical work experience at our OWL Bikes retail shop and workshop in Cambridge.



## In 2023-24, we've...

- supported 37 participants, 10 of whom have since found employment
- awarded 86 certificates for people who've completed a range of modules such as bike maintenance, retail and stock taking skills



**Fleur Patten, our Employment and Wellbeing Advisor, was shortlisted for the Employment Related Services Association Frontline Advisor of the Year award. Area Manager, Stef McNocher said "Her passion and dedication are infectious which is really reflected in the support she provides the customers of Routeways to Work."**

## Case study:

Eighteen-year-old Amy enrolled in Routeways to Work because she hoped to gain new skills and work experience. Amy felt her ability to work was impacted by her Global Development Delay. She was at college but wanted to find paid work that would allow her to support herself.

In her initial review with Fleur, her Employment and Wellbeing Advisor, Amy asked for help with creating a CV and preparing for interviews. Fleur and Amy practised interview techniques, studying questions and exploring positive answers. Fleur also organised a mock interview for Amy with an employer – our corporate partner Deloitte.

Amy's confidence grew visibly during the preparation, and the interview experience brought her a sense of relief and tears of accomplishment. Empowered by the mock interview, Amy successfully applied for and secured her first paid job.

**"The mock interview at Deloitte helped me to feel more confident, more outgoing and able to talk about my skills," said Amy. "When I went for my real job interview, I felt prepared by knowing what to say and answer questions. I got the real job so thank you, Deloitte!"**

# Values in Practice awards



Every month, our staff can nominate their colleagues for our Values in Practice (VIP) awards. Our Employee and Wellbeing Forum then votes for the top three nominees. These awards are a way of giving recognition and thanks for some of the fantastic work our staff do, shining a light on the ways they go above and beyond. Our annual VIP award winners are then chosen by a panel including members of the Employee and Wellbeing Forum, Trustees, customers and volunteers.



**Gold** went to the Information Technology team who organised Papworth Trust's first ever Boccia day in support of our BRIT challenge. This brought together staff and customers from across the organisation and it was such a success that it looks set to become an annual event!



**Silver Award** went to Joseph N'doro in our Housing Team for supporting a household through a complex issue. Thanks to Joseph's intervention, the tenants are now enjoying improved living conditions.



**Bronze Award** went to Barry Davis for making OWL Bikes a memorable experience for both customers and participants, driving up sales and instilling a culture of inclusion and fun for all.



## Customer focus



## Last year, we said we would...

one	two	three	four
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.

## Our progress made...

- We published our customer service standards, so you know what to expect when contacting us.
- We implemented our customer service action plan to improve tenant satisfaction. We also introduced transactional surveys for tenants who have had a repair carried out at their home.
- We introduced quarterly customer feedback weeks across our Day Opportunities services – read more in our case study. We produced information packs for new tenants and 'walkthrough' videos for new Day Opportunities customers to help familiarise them with staff and centre layout.



**I believe tenant representation is key for enjoying a mutually rewarding relationship with the Trust and putting systems in place designed to meet the needs of tenants.**

Jenny, Tenant Scrutiny Panel member

## Case study: Feedback weeks in Day Opportunities

As part of the new delivery model in Day Opportunities, we've introduced quarterly customer feedback weeks. These are enhancing our understanding of customer needs, fostering continuous improvement and promoting customer involvement.

Each feedback week adopts a theme, such as safeguarding or communications. Throughout the week, activities take place across each centre to gain customer feedback on that theme. This includes the use of suggestion boxes, parent/carer forums and Experts by Experience groups run by the customers. Visual aids such as happy or unhappy faces are also used to collect feedback.

Lucy from Abington Day Opportunities recently took part in a Customer Feedback week. She said:

**"I love coming to Papworth Trust. I get to see my friends, meet new people and do great activities like cooking and 'Around the World'. I love supporting my friends and running the tuck shop."**



Lucy from Day Opportunities in Abington

## Our actions for 2024-25...

- We will communicate to our customers in a way that meets their needs and preferences.
- We will develop an approach to Co-Production.
- We will increase care customers' independence and quality of life through the use of technology.



## Expected results and outcomes...

- Customers are better informed to make decisions, provide feedback and influence the way we deliver our services.
- Our customers will influence service and organisational decisions, leading to a more customer-focussed charity.
- Care customers are more independent through the use of technology.



# Sustainability



Photo credit: Simon Watson Photography

## Last year, we said we would...

one	two	three	four
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.

## Our progress made...

- Using the results from staff surveys, we developed staff morale and wellbeing action plans.
- We achieved our Cyber Essentials Plus accreditation.
- We invested in an electronic care rostering system.
- We approved our net zero strategy and started to look at how we can reduce our carbon footprint.
- We approved our business development and fundraising strategies to optimise funding and partnership opportunities and maximise our impact in the future.



**When I first came to your offices I was very afraid of what the future could do to me but with your dedication and support I feel that my future is now. Thank you so much to you and all at Papworth Trust.**

Work and Health programme customer

## Case study: Investment in technology

Our commitment to technology improvements has played a pivotal role in achieving significant sustainability milestones. Our Cyber Essentials Plus certification showcases our commitment to data security and positions us more favourably for current and future Government-funded opportunities.

We aim to be a forward-thinking organisation that stays on top of the fast- changing digital landscape. Our new electronic care rostering systems has efficiently replaced paper-based work, which demonstrates our dedication to digital transformation. Our next step is to implement a new electronic care management system which will centralise customer information and increase efficiency.

**“The technological strides we’ve made mean we’re meeting industry standards – but they also show that we’re ready to adapt to the evolving digital landscape. We will keep innovating and aiming for excellence in our IT systems, as this will help us deliver high-quality services for our customers.”**



Mark Blake, Director of Finance and IT

## Our actions for 2024-25...

- We will develop an information management strategy.
- Through investment and planning we will ensure our workforce has the knowledge, skills and resources to deliver great services.
- We will develop a net zero action plan.
- We will develop a commercial property strategy.
- We will develop a housing strategy.

## Expected results and outcomes...

- Improved data accuracy, reduction of risk and a more effective and resilient organisation.
- A satisfied, stable and motivated workforce who have opportunities to develop their knowledge and skills and deliver great services to our customers.
- A three-year action plan which will see the Trust reducing our carbon emissions through improved working practices, homes and facilities (such as buildings and vehicles).
- The Trust will have successfully bid for Government funding which will be used to improve our homes to meet decarbonisation targets.
- We will have a 10-year roadmap for each of our commercial properties to meet the needs of our customers and staff.
- We will have a 30-year plan for property management, maintenance and development of our homes to ensure tenant satisfaction and good quality homes.



## Grow our impact



### Last year, we said we would...

#### one

Increase our brand awareness across the East of England.

#### two

Implement our volunteer strategy.

#### three

Develop our offering to deliver more services to more disabled people.

### Our progress made...

- We remodelled and rebranded our Day Opportunities service, embedding new Caseworker roles to support customers to achieve their goals and aspirations. We've increased the number of sessions we're delivering to customers; that's 3,500 more sessions this year.
- We secured the Work and Health Programme's 'Pioneer' project in partnership with Shaw Trust. Pioneer supports participants who need assistance in connecting with employers, enhancing their skills and securing jobs.
- We implemented our volunteer strategy.
- We consulted with Papworth Everard residents on ways to help combat loneliness and isolation in the village.
- We attended over 80 employment and careers fairs, transition and learning events to raise awareness of who we are and the services we offer across the East of England.

**63 volunteers**  
= 15,000 hours



**6 companies**  
= 51 people  
= 300 hours of corporate volunteering



**Our experience with Papworth Trust was incredibly rewarding, and we are grateful for the opportunity to give back to our community.**

Richard Finn, General Manager, Hilton Hotels Cambridge City Centre

## Case study: Volunteering

Our volunteers play a pivotal role in supporting our customers and the wider Trust. Their selfless commitment to our core services has been invaluable and we are immensely grateful for their unwavering dedication.

We had several volunteers from our corporate partners who contributed to one-off projects such as gardening, decorating and the OWL Bikes shop relocation. This has made such a positive difference to everyone who accesses our services. Corporate partnerships brought additional support in sponsorship, fundraising and community outreach, which further increased the impact we could make for our customers.

**“We are so grateful for the unique contributions our volunteers make. We're dedicated to make volunteering open to all, so we'll continue to develop an inclusive volunteering programme – one that reflects our diverse communities and helps us achieve our organisational goals.”**



Sarah Harvey, Director of People and Culture

### Our actions for 2024-25...

- We will deliver our 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 delivering quality homes in the right geographical location, secure future funding for employment programmes and continually evolve our offer to suit the labour market.
- We will also seek fairer funding for Social Care and continue to improve our Day Opportunities. In reaching these, more disabled people can achieve their independent living targets, become more economically active and enjoy a good quality of life.



## External influence



### Last year, we said we would...

#### one

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

#### two

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

### Our progress made...

- We responded to seven Government consultations, attended a Data Poverty Parliamentary roundtable and spoke to local MPs on our key policy areas of social housing, disability employment and social care funding.
- We partnered with national umbrella organisations to push for fairer outcomes for disabled people, including the National Housing Federation and Shaping the Future of Volunteering. We held events across our services to celebrate His Majesty The King's coronation, the Big Help Out and International Day of Disability.
- We supported Cambridgeshire County Council with their Preparation for Adulthood strategy work. We're now working with local SEN schools about children's options at this crucial transition point in their lives.
- We refreshed our website homepage with a cleaner, modern feel that has accessibility features at its heart.
- We became a Disability Confident validator and supported two organisations to achieve their Level 3 Disability Confident Leadership accreditation. We supported a further 48 organisations to become Disability Confident Levels 1 and 2. We achieved this through offering personalised advice and guidance, lunchtime learning sessions and online resources.



**The Disability Confident Leader assessment process and the feedback we received from Papworth Trust has really supported our knowledge and enabled us to continue to work to be as inclusive as possible.**

**Orwell Housing**

## Case study: Empower

In partnership with the UK Parliament community outreach team, we are running Empower! training sessions across our Day Opportunities services. These sessions guide people with learning disabilities about the work Parliament does and how they can take action on issues they care about. We cover a range of issues including how laws are made, your right to vote and the different ways you can vote, how to contact your local MP and how to create a petition.

At the Empower! session in Huntingdon, Dan said,

**"I think it was excellent and very informative and would like more of these sessions regularly."**



Dan from Day Opportunities in Huntingdon

### Our actions for 2024-25...

- We will increase the number of employers we work with to raise disability awareness through promoting Disability Confident.
- We will develop and implement our brand awareness strategy.



### Expected results and outcomes...

- Through our work in raising disability awareness and dispelling myths, more employment opportunities for disabled people are created.
- Papworth Trust is actively influencing local and national policy through use of data and membership of forums. Our expertise is being sought and championed, leading to disabled people having greater equality, choice and independence.



# Financial overview



## Income and Expenditure Summary 2024-27

£'000s	2024-25 Budget	2025-26 Plan	2026-27 Plan
<b>Income</b>			
Housing	5,503	6,133	5,986
Care	4,169	4,600	4,937
Work	758	438	36
Day Opportunities	1,853	1,964	2,058
Other Income	2,212	2,201	2,225
<b>Total Operating Income</b>	<b>14,496</b>	<b>15,337</b>	<b>15,243</b>
<b>Expenditure</b>			
Housing	(5,293)	(5,546)	(5,763)
Care	(4,381)	(4,885)	(5,186)
Work	(806)	(543)	(114)
Day Opportunities	(1,860)	(1,940)	(2,023)
Other expenditure	(1,063)	(996)	(980)
<b>Total Operating Expenditure</b>	<b>(13,403)</b>	<b>(13,909)</b>	<b>(14,068)</b>
<b>Surplus</b>			
Housing	210	588	223
Care	(211)	(285)	(250)
Work	(47)	(105)	(78)
Day Opportunities	(6)	25	34
Other Surplus	1,151	1,206	1,245
<b>Total Operating Surplus</b>	<b>1,097</b>	<b>1,428</b>	<b>1,175</b>
Interest payable	(626)	(583)	(541)
SHPS pension operating cost	(172)	(179)	(184)
Property investment	(250)	(250)	(250)
<b>Total Surplus</b>	<b>47</b>	<b>416</b>	<b>201</b>

## Notes on our income and expenditure

The financial projections in this Business Plan reflect some improvement in income over the previous plan, mainly through improved rates but also with some anticipated growth in our Day Opportunities, though these are offset by an increased cost of provision. Underlying costs have increased following higher inflation rates experienced over the past 12-18 months and although we see these easing, this has had an adverse impact on our forecast surpluses. These remain modest throughout the plan period, and therefore close financial management will need to be maintained to ensure that we stay on course.

We do anticipate interest rates to fall over the course of the plan, reducing the pressure a little, and will actively explore opportunities for growth and development of our services; though this plan also recognises the ending of the Work and Health Programme, with no substantive participation in any follow on programme identified at this point in time. Improvements in systems and processes will continue as we pursue our digital roadmap, and we will also continue to seek to improve our housing stock as we focus on the challenges of net zero for the organisation, and the investment that this entails.

## 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, though this capital investment does utilise our cash balances held. Our liabilities decrease due to the scheduled repayment of elements of our loan portfolio, as well as paying down the defined benefit pensions liability, leading to a modest increase in net assets.

We have significant capital expenditure of £5.9m identified over the course of the plan for which we anticipate raising additional finance to support, either through further financing or investment funds utilisation.

### Key balance sheet and cash flow metrics:

- Housing properties growth from **£37m to £38.9m**
- Pension deficit liabilities continue to reduce throughout the plan.
- General reserves expected to reduce to **£5.2m**, but still within target range.
- Net assets forecast to grow moderately to **£29.5m**
- Capital investment of **£5.9m** over the life of the plan



# Key risks and Sensitivities



## Key risk 1

**The Varrier-Jones Foundation (VJF) are not able to maintain the current level of donation:**

- A level of unrestricted income is essential for the Trust to deliver planned services. VJF are the primary provider of unrestricted income 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

**Response to risk:**

- Continue to work with VJF to secure a longer-term funding agreement
- Utilisation of investment funds to meet increased capital requirements in the medium term

## Key risk 2

**Social Housing Pension Scheme (SHPS) deficit liability doesn't reduce:**

- Remeasurement of the liability anticipated in 2024; inflationary impacts make the outcome uncertain and not in our control
- Expected payments of £2.3m against this liability over the plan period should materially reduce the liability, improving cash flow after 2028

**Response to risk:**

- The Trust would need to liquidate elements of its investment portfolio to meet increased liabilities that are not supported by operational cash generation



## Key risk 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 £11.44 per hour, challenges economic viability
- An additional £1 per hour in pay rates costs more than £300k per year
- 1% shortfall in funding results in £170k shortfall over the life of the plan

**Response to risk:**

- We recognise that inadequate funding of social care is a national issue, made more challenging by the reduced availability of labour, therefore we are continuing to improve the terms and conditions of our lower-paid staff to improve market competitiveness and retention of our staff

## 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 our costs by £21k per year
- 1% increase in inflation adversely impacts us by about £48k per year

**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 alongside renegotiations with commissioners over pricing

## Key risk 6

**Lack of emerging employment contracts**

- Employment income drops from £895k per year to £172k per year over the duration of the plan. Work and Health programme completes in 2026-27
- If no alternative contracts emerge, we will not have a substantive presence in this field and may incur significant redundancy costs

**Response to risk:**

- Continue seeking alternative replacement programmes (likely to be smaller in size)
- Participation in any future programme will continue to be as a sub-provider, rather than as a prime contractor, therefore maintain positive relationships with key contractors



# Supporting disabled people to be seen for who they are.



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