



Strategy - Summary Version 2022-2025

WELCOME FROM OUR CHAIR

A lot has happened since we published our last Strategic Review, our move from a Community Interest Company to a registered charity in 2020 plus facing considerable operational challenges due to the Covid pandemic. However, the adaptability, tenacity and commitment of our dedicated staff meant alternative ways of operating were found to ensure that our clients' needs continued to be met. We are proud of the efforts of all our teams and their hard work to achieve this. The Covid crisis also meant we were not able to grow our services as we would have wanted and some even reduced. However, the resilience we have built up as an organisation, will in turn strengthen our performance and assist in developing a successful and sustainable business.

Going forward we need to find ways to diversify our income which may include expanding into new locations, increasing the proportion of private paying clients and partnering with complimentary organisations to yield new service opportunities. Next year Balance will celebrate its 10th anniversary let's look forward and focus on the next chapter in Balance's development and what more we can achieve in the future!



Many thanks
Jeanette Swan

OUR PRIMARY PURPOSE

The development of services that support the independence of vulnerable people with learning disabilities and/or enduring mental health needs and the continuing development of services within South West & West London.



OUR MISSION

To support people to live safely and healthily in their own homes

To provide the tools and opportunities people need to live independently & successfully

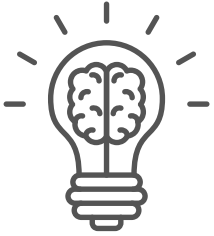
To Ensure people have choice and control over the support they receive



IDENTIFYING AND MEETING OUR OBJECTIVES

These are the priorities that will set the framework against which the charity's values and sustainability should be built

SKILLS



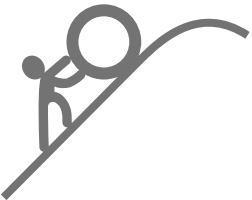
The skills and assets inherent to those using and delivering our service are central to its development. The charity will build a systemic approach to strengths-based practice and collaboration that values the contribution of all those associated with its growth and development.

FINANCE



We are financially stable with a diversified approach to revenue generation and income growth. That the charity optimises its financial and income development approach to properly underpin its costs, drive new business and generate cost effective returns on its investment.

CHALLENGE



We build an organisation that values difference and actively challenges barriers of inclusion in and outside the charity's boundaries. That we confront not only the institutional barriers of discrimination that impact on the lives of those with learning disability or enduring mental illness that use our services. But also, for those that work for us, support us and influence the way we do business.

RECOGNITION



We are a recognised community player in Kingston and beyond – that we reposition the organisation as a key charitable body in SW London both in terms of its contribution, its brand and its broader influence across the community.

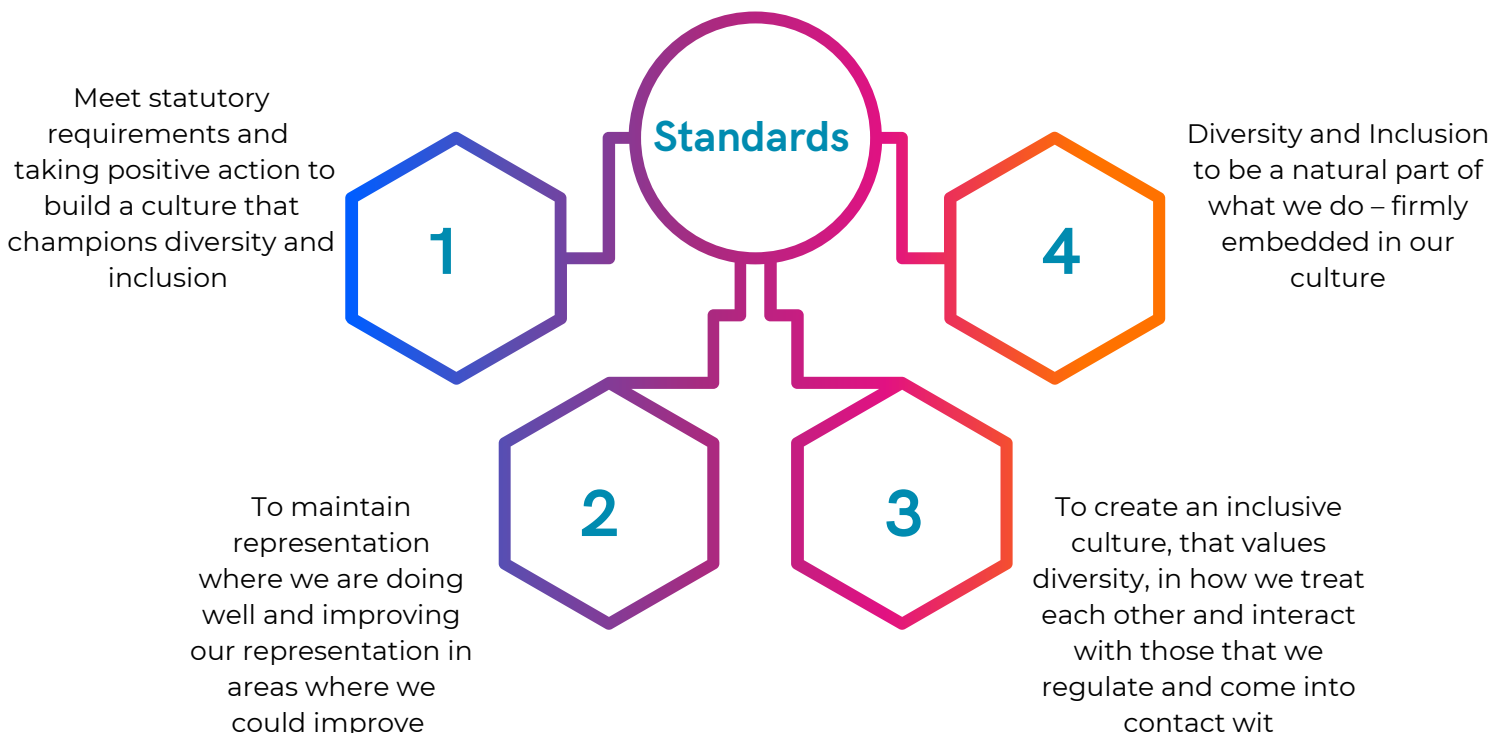
OUR VALUES



Our values underpin who we are and how we work. They recognise that Balance is a complex organisation with a range of internal and external audiences. They articulate our intention to build an adaptable organisation, one that recognises the contribution that all participants bring to shaping its resilience and accountabilities.

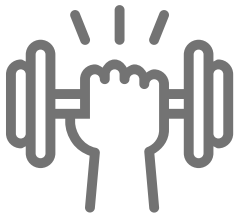
DIVERSITY AND INCLUSION

For those we support as well as those that work for us, being clear on our minimum standards and approach to inclusion must remain a key facet of our development and delivery of new and existing services. The Charity Commission sets out four key standards toward meeting its obligations under the Equalities Act:



To ensure we build an inclusive organisation, we will work toward delivering the following commitments:

STRENGTH



We will apply a strengths-based approach to operational design and delivery, seeing each of our services as a resource that supports the knowledge, skills, and capacity of those using our services to maintain their dignity and independence.

QUALITY



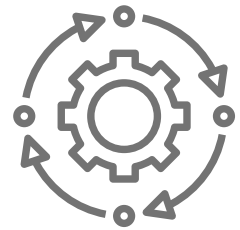
Quality assurance across all service lines will be a continuous process of improvement. Guaranteeing transparency on the kind of interventions and support that our beneficiaries and other stakeholders can expect from our volunteers and staff.

CORRECT



Where we can clearly evidence that something does not work anymore, we will take action to modify or close it before it impacts negatively on the wider position of the charity's cost and operational base.

SYSTEMS

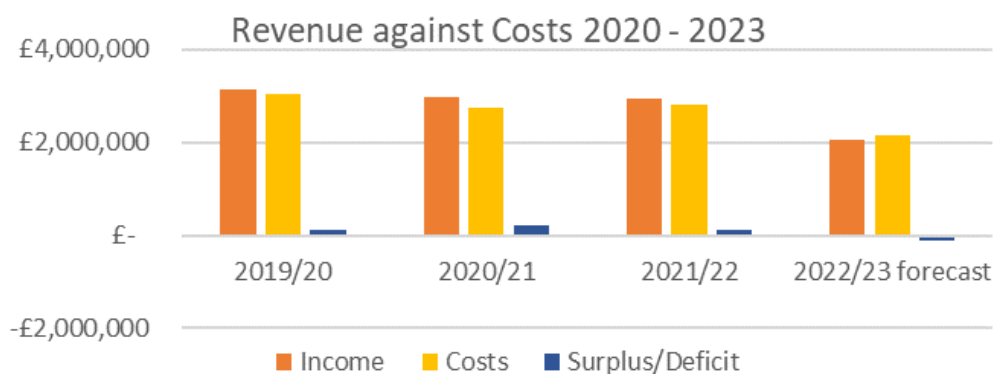


And that we will work toward ensuring our systems, development targets and operational support are fully reflective of our changing community and its diverse needs.

FINANCES & OUR SUSTAINABILITY

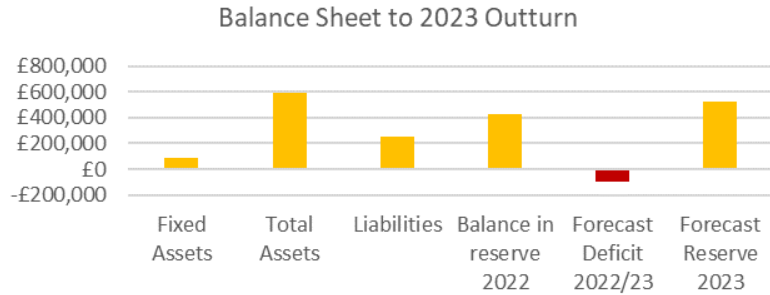
MANAGING OUR COSTS

Budget evaluation and planning in January 2022 assumed a budget deficit of £113,000 for the new financial year. Historic surpluses against the charity's annual costs have accrued principally as a result of over performance in a single area of the charity's business, its residential care provision at Woodbury. With the closure of this scheduled for autumn 2022 the effective subsidy that this supplied to underpin other underfunded areas of activity will cease. With additional inflationary pressures impacting on our bottom line the charity will need to manage its costs more sustainably in the immediate and medium term.



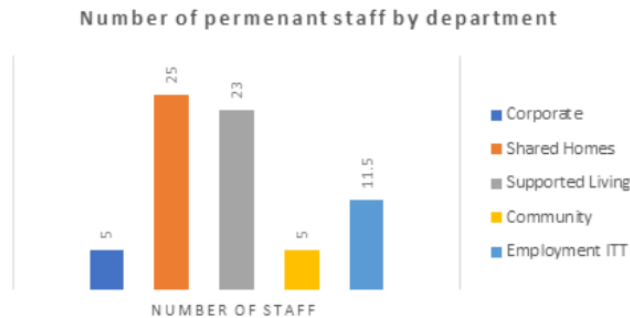
RESERVE

Our reserves position for an organisation our size is also of concern. The balance summary below set against our forecast deficit for 2022/23 underlines our vulnerability. With annual turnover forecast at £2 million, a cash reserve of less the £400,000 leaves little emergency recourse, in meeting any risks obligations associated with operational failure, delays in investment or unforeseen cost pressures.



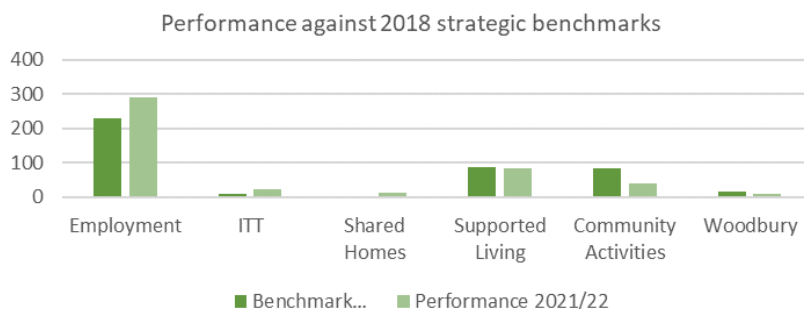
STAFFING

Staffing remains our primary financial driver. Although staffing numbers have fallen in absolute terms from 114 in 2018 to 70 in 2022 those delivering our services still constitute 82% of our operating costs. This will continue to be our biggest financial commitment given the nature of our work



OPERATIONAL PERFORMANCE

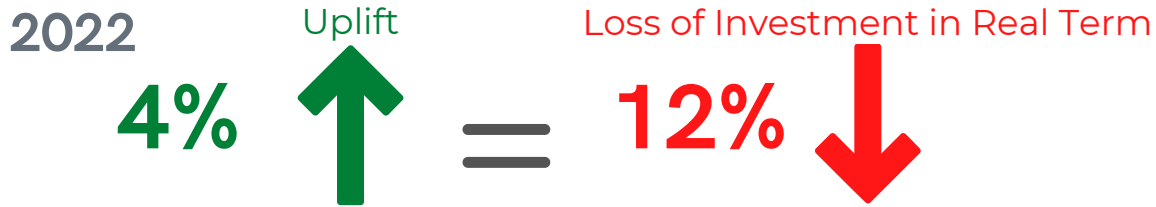
Outputs for each department against the benchmarks set in 2018 show the following shifts in performance. The total number of individuals that the charity worked with in 2021/22 has increased against the 2018 outturn by 8%. With improved performances for Employment, Travel Training and Shared Homes particular highlights



THE FUTURE

The local and national context for adult social care is one of considerable flux. The status of the charity's contractual relationships and their likely sustainability is fluid. None of our current contracts extend beyond 2023, with at least one (Community Activities) facing retender in the autumn of 2022.

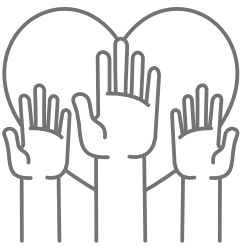
Despite an average cost of living increase across all contracts for 2022/23 of 4% , cumulative inflation since 2018 has been 12%, with forecasts for further increases of a similar amount for this year further exacerbating our already tight fiscal position.



The challenge for an organisation such as ours is to deliver against increasingly robust transformational targets on the basis of ever shrinking contract values and tighter operational margins.

KEY AREAS FOR DEVELOPMENT

VOLUNTEERING



Volunteering in the charity (we currently have 9 registered volunteers) is substantially below what a community-based organisation our size should warrant.

SOCIAL MEDIA



Our limited digital and social media presence inhibits our ability to broaden our market and reshape our potential customer base

EVALUATION



With no comprehensive evaluation mechanism across our services, understanding the quality and impact of our work is a challenge

EFFICIENCY



Work must continue to reduce our costs and overheads by building on the charity's use of digital technology to enable efficiency gains in how we support and oversee our work.

NEW MARKETS



That as we develop the business and enter new markets we have the skills base and the appropriate rewards to recruit and retain the right staff.

FINANCIAL RESILIENCE

The external environment for the charity is constantly shifting, our business approach requires greater market responsiveness alongside a properly articulated sense of the difference we make to those who use our services. We will need to make the most of new opportunities as they arise, widening both public and private relationships to deliver financial resilience and sound operational growth

Our financial governance and contractual performance must ensure an equitable return on our costs. That what we spend should not outpace what is invested unless we are building new areas of business that generates revenues and a wider market position. Such growth may require movement away from our traditional geographical territory. That we build on our existing knowledge and skills to develop opportunities in new disciplines as well as new places.

OUR QUALITATIVE & EVALUATIVE DRIVERS

Building a quality framework that centralises a suite of critical success factors to support evaluation against our current baselines will enable a shift from our current positing of knowing what we do to a more developed understanding how well we do it.


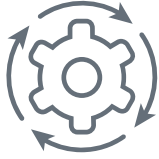

Following consultation and internal evaluation by trustees, our leadership team and other senior operational staff the following key cultural drivers, priorities and skills needs have been identified as central to our future development and identity as an organisation.

BUSINESS & FINANCIAL DIVERSIFICATION

Both the previous strategy and this one has acknowledged our overdependence on RBK as our primary source of revenue. The following steps will be essential in sustaining our future as a continued player in this borough's social care environment as well that of new markets.


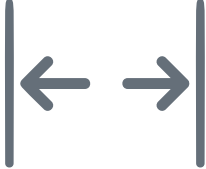


- Paid for services – We will need to increase the proportion of our service portfolio accessible to those willing to pay privately for our services.
- We will need to extend the geography of operations to neighbouring boroughs or broaden our work in those that we already operate within.
- Increase income development through individual giving, charitable allies and community fund raising where capacity allows
- Increased and targeted investment from grants and trusts
- Greater collaboration and partnership in developing new services and activity

What we are working towards

<p>The Cultural Drivers</p> 	<p>Operational Priorities</p> 	<p>Development Needs</p> 
<p>That the charity is clear about who we are and why we do what we do</p>	<p>That people with a learning disability or mental health issue remain our core business</p>	<p>Stronger outward facing promotion, digital and media development</p>
<p>That we are visible, authoritative and trusted</p>	<p>That we work beyond our traditional boundaries to new geographies and new areas of business</p>	<p>A systemic approach to learning, professional development and organisational change</p>
<p>That our operational support and interventions are Person centred and client led</p>	<p>That we option the development of specialist provision in autism</p>	<p>Increased user leadership, control and participation</p>
<p>That we are asset not deficit based in our work and commitments</p>	<p>That we widen the development and responsiveness of our services using the skills and strengths of those using them</p>	<p>Build qualitative, evaluative and evidenced based practice</p>
<p>Advocates and campaigners in and beyond our sector</p>	<p>That we occupy public positions on the rights and needs of our client groups</p>	<p>Increased volunteer participation, development and promotion</p>

Developing our Quality Standards

In line with the priorities set out above a shift in our approach to developing quality standards will set the following outcomes and targeted deliverables as part of wider strategic objectives.

<p>Key Qualitive Outcome</p> 	<p>Current Gap</p> 	<p>Intervention</p> 	<p>Impact</p> 
<p>A comprehensive evaluation and quality outcomes framework across the business</p>	<p>No operational performance standards to measure quality and impact of our work</p>	<p>Build and align an evaluation impact framework across all services to drive business improvement</p>	<p>A set of comprehensive measures against which to evaluate our performance</p>
<p>Achieve industry standard for training and development across all operational disciplines</p>	<p>No current skills evaluation assessment against our emerging business development needs.</p>	<p>Complete skills audit against industry standards to institute a training framework that meets them</p>	<p>90% of all staff and volunteer have met mandatory training requirements by end Q4 2025</p>
<p>That we meet independently adjudicated quality evaluation standards for our operations and governance</p>	<p>The charity meets no industry quality standards except that for its CQC registration</p>	<p>Complete ISO 9001, Trusted Charity Standard evaluations and maintain CQC ratings.</p>	<p>Quality standards met to achieve awarded status by end Q3 2023</p>

MEETING OUR CHALLENGES AND BUILDING OUR FUTURE

The information below describes our core strategic priorities to deliver both short and long term change over the next 3 years. Aligning with both our corporate objectives and charitable values they will set minimum standards for our coherence as an organisation as well as a measurable impact against our current baselines.

Primary corporate drivers	Corporate Value	Priority	Rationale	Outcome	Impact
Operational governance and oversight	Professionalism	Delivering governance and quality assurance that consistently meets industry standards.	Critical benchmarks outlined in the Fundraising Code and Charity Commission Guidance Standards set clear baselines against which the charity should judge its performance.	That we meet independently adjudicated quality evaluation standards for our operations and governance	ISO 9001 quality assurance approved and validated
Revenue and business development	Sustainability	Delivering growth, sustainable revenues, and a diversified income portfolio	Revenue shortfalls and 30% loss in contractual revenue in 2022 undermine our long-term business viability	Business and income performance that future proofs our development and sustainably	Charity reserve achieves minimum 4 months running costs end Q4 2025.
Geography and our community of interest	Independence	Building on our values and strengths as a service provider to drive new business and contractual relationships	80% of the charity's commissioned provision is generated through or targeted at delivery in the London Borough of Kingston.	Increased output and performance in neighbouring boroughs or thorough opportunistic development.	Contracted activity increased by 20% (by value) against current baseline for boroughs beyond Kingston.

Primary corporate drivers	Corporate Value	Priority	Rationale	Outcome	Impact
Inclusion participation and control	Empowerment	Extend the experiential leadership and knowledge base of users, their families and staff in shaping service design and delivery outcomes	Kings fund research asserts the increasing importance of asset-based service delivery and user leadership in meeting complex needs in social care settings.	Support and services that are shaped, led and built on the strengths of those using and delivering them.	80% of those using our service indicate measurable improvements in the confidence and control of their lives.
Partnership and collaboration	Partnership	Identifying collaboration and partnership to build skills, capacity and opportunity.	There are 344 charities in Kingston worth a collective £129 Million with similar capacity in neighbouring boroughs.	Increased Partnership and collaboration delivering business transformation and new service delivery	Partnership based activity contributes a net 5% of total turnover by end 2025
Skills and knowledge development	Staff Recognition	Skills, Knowledge and abilities align with the charity's changing needs and demands	NCVO data for 2019 indicates the VCS reports lower skills gaps than the private and public sectors	A workforce that is equipped and skilled to meet the demands of a changing sector	90% of all staff and volunteers have met mandatory training requirements

And Finally - Our continuing obligations and responsibilities

The charity recognises we are operating at a time of considerable change, not just for this charity but for the wider sector as a whole. Whilst our accountabilities, motivations and primary purpose remain largely consistent with our previous status as a community interest company they diverge in terms of our charitable governance and constitutional commitments.

Building the business, its resilience and its core interests are contingent on our continuing to meet our defined objects as a charity and the associated vision that aligns to them. Considerable work has already been undertaken to ensure we meet the changing demands of not just our newly minted status but those across the broader social care economy. The directors trust that this new vision for the organisation will act as a foundation for its progress and development beyond the time frame set out at the top of this document.

Guy Stevenson, CEO



Regulated by



BALANCE (SUPPORT) CIO IS A REGISTERED CHARITY
NO 1190589