

Strategic Delivery Plan – Balance CIO

Current plan covers period - *Quarter 2 2022 – Quarter 4 2025*

Principle Business Driver/Operational Outcome	What is the current position (Issue/Resource)	How will it be achieved (Activity)	What will be the impact (Demonstrated Change)	When will it be done by
Delivering growth sustainable revenues and a diversified income portfolio	Financial evaluation in 2022 indicates short falls in contract revenues between 3% and 23% against cost for all contracts.	All contractual agreements made on the basis of full cost recovery.	Charity reserve achieves minimum 4 months running costs end Q4 2025.	End Q4 2025
	74% of the charity's contractual revenue was sourced from the London Borough of Kingston, representing a sustainability risk. Charged for revenues constituted less than 4% of turnover in 2021-22	Actively build contractual and operational relationships into neighbouring SW London boroughs.	Contracted activity from alternatives to LBK increased by 20% against 2022 baseline.	End Q4 2023/4 and 2024/5
Budget flexibility, control and management is routine and fully accountable	Management access to financial reporting until April 2022 limited and moderated through the finance team. Budget control not currently target driven in terms of oversight and controls against corporate plans.	Departmental financial KPI's are defined and monitored as a performance objective for all managers		
Revenue will match costs as a sustainable resource.	Budget deficit forecast at £116K in 2022-23, though tighter controls and revised contract values may reduce the overall cost pressure to the organisation. Unit cost valuations against current contract and chargeable services are between 9% and 19% below their what the charity should be paid against a break-even point.	Monitor and evaluate against all target KPI's and manage through the charity's governance and reporting structure.	Budget Deficit reductions by minimum of 30% against 22/23 baseline annually	End Q4 2023/4 and 2024/5
Central costs and management overheads are reduced as a percentage of our corporate budget	Fixed and variable costs are likely to increase in line with inflation by at least 11% in 2022 based on most economic forecasts Indirect support costs and management overheads currently constitute 12% of the total budget, a reduction of 1% on the previous year. Closure of Woodbury is a £1.2 Million loss to the charity with a net investment loss of £276K based on last years outturn	As above	Indirect costs maintained at 3% of overall budget	Review annually at end Q4
Lower reliance on agency capacity generates improved departmental margins	Agency costs totalled 7% of turnover in 2022, 3% above the strategic target set in 2018. Casual and zero hours contracted staff constituted 29% of our total workforce in 2021-22	Option wider benefits to improve our market position as a local employer of choice to retain staff and reduce recruitment costs. Promote bank, employment flexibility and supporting technology to generate efficiencies in how and where staff are used to meet demand and reduce costs	Agency utilization reduced to 4% of total staffing budget Departmental deficits reduced by 50% from current projections year on year to 2025.	Review annually end Q4 Review at end Q4 2022/3 and annually thereafter

Objective 2 - That our interventions are quality assured and measurable by impact

2022 - 2025

Principle Business Driver	What is the current position (Issue/Resource)	How will it be achieved (Activity)	What will be the impact (Demonstrated Change)	When will it be done by
Delivering governance and quality assurance that consistently meets industry standards	Budget deficit forecast at £116K in 2022-23, though tighter controls and revised contract values may reduce the overall cost pressure to the organisation.	Review, monitor and benchmark against governance and regulatory/industry standards inc - Charity Commission, CQC, Fundraising Regulator, Trusted Charity Standards and our contracts	ISO 9001 quality assured and validated Rated by CQC as “good”	End Q3 2023 End Q2 2022
	Baseline governance and oversight of charity finance through review at quarterly board meetings, in line with our SORP obligations.			
A comprehensive evaluation and quality outcomes framework across the business	No impact evaluation measures currently in place across the whole organisation limiting our understanding of the difference we make	Work with those using our service, staff and commissioners to develop corporate outcomes framework that addresses both our commissioned and strategic evaluation measures.	Impact and evaluation framework agreed and instituted by year end	End Q 4 2022/23
	No cross organisational performance management framework limits our ability to assess productivity, staff performance against our corporate benchmark’s and address gaps accordingly.	Institute fully evaluated training framework of mandatory and elective training to drive performance, increase skills and qualifications that support our development.	90% staff and volunteers complete mandatory and refresher training annually Minimum of 20% of staff per year get access to elective courses toward personal development objectives.	Review annually end Q4 Review annually end Q4.
That we meet independently adjudicated quality evaluation standards for our operations and governance	Staff across the organisation scored the charity’s performance in their support and development at only 48%.			
	Current CQC registration is rated good. However the charity has no other quality assessment marks – CHAS, ISO 9001, ISO 14001, NCVO PQASSO increasingly central to contracting and commissioning. Pre-qualification quality assurance for government contracts increasing requires compliance with nationally recognised standards by charities.	Complete ISO 9001, Trusted Charity Standard evaluations and maintain CQC ratings.	ISO 9001 quality assured and validated	End Q3 2023

Objective 3 - That we build interventions that mobilise skills, knowledge and abilities to direct our work and shape its impact

2022 - 2025

Principle Business Driver	What is the current position (Issue/Resource)	How will it be achieved (Activity)	What will be the impact (Demonstrated Change)	When will it be done by	
<p>Skills knowledge and abilities align with the charity's changing needs and demands</p> <p>Achieve industry standard for training and development across all operational disciplines</p> <p>Building on our values and strengths as a service provider to drive new business and contractual relationships</p>	<p>CQC qualification standards require Care Certificated employees as a minimum standard. ISO 9001 and Charity Quality Standards required evidence compliance with training and development standards against a range of nationally agreed benchmarks.</p> <p>Skills for care list 17 mandatory standards necessary for social care providers.</p> <p>NCVO sites evidence indicating skills gaps in across the sector of 39% for existing staff engaged in social care activities. And gaps of around 14% for high skill roles for staff newly recruited.</p>	<p>Quantify skills and knowledge standards against external evaluation criteria</p> <p>Institute fully evaluated training framework of mandatory and elective training to drive performance, increase skills and qualifications that support our development.</p>	<p>ISO 9001 quality assured and validated Charity Quality Standards Assureds</p> <p>90% of all staff and volunteer have met mandatory training requirements</p>	<p>End Q3 2023</p> <p>Review annually at end Q4</p>	
	<p>Staff across the organisation scored the charity's performance in their support and development at only 48%.</p> <p>As above.</p>	<p>Identify and develop specialist skills internally that support our development, sustainability and growth</p>	<p>90% of staff report that their training and development needs are met</p>	<p>Review annually at end Q4</p>	
	<p>NCVO research also indicates 60% of employers stating incomplete training the main cause of skills gaps in current staff</p> <p>With less than 4% of revenues generated through charged for services and 74% of revenue tied to a single funder developing options for new service delivery remains a priority.</p> <p>The charity currently operates with no formal or joint enterprise partnerships across it service platforms limiting innovations and investment opportunity.</p>	<p>Develop options for increased volunteering as a central feature for our support and community services</p>	<p>Partnership based activity contributes a net 5% of total turnover by 2025</p> <p>Volunteering across each of our services to increase by a minimum of 4 individuals from its current baseline</p>	<p>End Q 4 2025</p> <p>Review Quarterly as part of our corporate monitoring</p>	
	<p>The Community Life Survey in 2021 found a fall in volunteering from 23%to 17% in over 16's. With the biggest declines in support to the old and those with a disability.</p> <p>Volunteering England estimates a return on investment of £4 - £8 for every pound invested in volunteering for a charitable organisation such as Balance.</p>				

Objective 4 - That our operations are scalable, targeted and appropriate to our core business

2022 - 2025

Principle Business Driver	What is the current position <i>(Issue/Resource)</i>	How will it be achieved <i>(Activity)</i>	What will be the impact <i>(Demonstrated Change)</i>	When will it be done by
<p>Delivering governance and quality assurance that consistently meets industry standards.</p>	<p>The Charity Governance Code underlines the responsibility of an organisations directors to ensure public confidence in a charity’s risk management, governance oversight and quality assurance in how it defines and delivers its work.</p>	<p>Review, revise and update our policy and governance framework against national and local standards</p>	<p>ISO 9001 quality assured and validated</p>	<p>End Q3 2023</p>
	<p>Balance currently provides no formal reporting of operational activity against fixed qualitative and quantitative measures the charity lacks accountable details against which to measure it’s performance.</p>	<p>Build and align an evaluation impact framework across all services to drive business improvement</p>	<p>Self-evaluation identifies 90% of Trusted Charity Standards reached</p>	<p>As above</p>
<p>Extend the experiential leadership and knowledge base of users, their families and staff in shaping service design and delivery outcomes.</p>	<p>Research and data underpinning the Department of Health and Social Care framework for strengths-based working underlines the resourcefulness of individuals in problem solving where enabled and supported to do so.</p>	<p>Develop and implement user involvement framework to drive participation and leadership in shaping interventions</p>	<p>80% of those using our services indicate they increased confidence in shaping and controlling their lives and the charity’s activities</p>	<p>Review annually end Q4</p>
	<p>Health Foundation evidence found that training, support and cultural change was critical in moving support and services from a deficit to asset-based model.</p>	<p>Commission corporate wide training to underpin our commitment to person centred and asset-based planning.</p>	<p>90% of staff complete training PC and Asset-based planning</p>	<p>Complete by end Q1 2023</p>
	<p>Skill for Care sees and asset model “valuing people accessing care and support and their families as experts about themselves and their lives”</p>	<p>Evaluate and increase roles of our existing and potential users in delivering and supporting service delivery and design.</p>	<p>80% of staff, users and volunteers indicate they have influenced the shape and design of services</p> <p>80% of those using our services indicate measurable improvements in the confidence and control of their lives</p>	<p>Review annually at end Q4</p>

Principle Business Driver	What is the current position <i>(Issue/Resource)</i>	How will it be achieved <i>(Activity)</i>	What will be the impact <i>(Demonstrated Change)</i>	When will it be done by
<p>That our operational support and interventions are Person centred and client led</p> <p>Support and services that are shaped, led and built on the strengths of those using and delivering them.</p>	<p>Mencap research on mental health support to people with LD found - Staff supporting people with a learning disability “are likely to use a challenging behaviour rather than a mental health conceptual framework to understand problematic behaviours”</p> <p>32% of people questions in the 2017 British Social Attitudes Survey indicated people with LD are not as productive as those without LD. Mencap site education, support and advocacy as all key in shift misconceptions and transformation in reshaping the way agencies work and individuals are supported.</p> <p>Kings Fund research asserts the increasing importance of asset-based service delivery and user leadership in meeting complex needs in social care settings.</p> <p>The care act list nine key elements central to wellbeing https://www.scie.org.uk/care-act-2014/assessment-and-eligibility/eligibility/wellbeing and a person centred approach.</p> <p>The charity currently has no framework against which to structure and evaluate how far it achieves the core standards set out in the Care Act.</p>	<p>Commission and maintain training and skills in Person Centred Planning as a priority for all staff</p> <p>Develop training and skills that centre asset-based planning as a key delivery commitment across the organisation and its service.</p> <p>Build a culture of consultation, discussion and inclusion on the shape, design and development of our services.</p> <p>Identify and develop corporate and operational governance that align with Care Act standards in choice, control and independence</p>	<p>80% of those using our services indicate measurable improvements in the confidence and control of their lives</p> <p>80% of staff say they have confidence in the charity to support their skills and development needs.</p> <p>75% of users, carers and family members cite Balance as their preferred provider of services.</p>	<p>Review annually end Q4</p> <p>Review annually end Q4</p> <p>Review annual end Q4</p>