



BALANCE SUPPORT CIO

Strategy 2026-30

live the life you choose



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Introduction

The following document represents the culmination of four years’ transformation and growth in how the charity supports its activities, addresses its challenges and builds financial resilience. That the charity has met these challenges and made changes underscores the commitment of its staff, the people who use its services, the work of its trustees and the support of community allies in re-framing the charity’s purpose and relevance.

This strategy sets out how over the next four years, Balance will build on the legacy of its previous strategic outcomes. It acknowledges both the tensions across the external market and the likely impact on maintaining a sustainable financial framework and the centrality of building services in partnership with the people that use, deliver and are allied with them.

This document also recognises that given the already published range of national priorities to reshape social care, any thoughts on the future will require flexibility to manage their implications. Developments related to the Fair Pay Agreement, Employment Rights Act 2025, the development of a National Care Service, in addition to decisions emanating from the Casey Review will all influence how the sector (and Balance) must respond.

The period between this document and the last has not been without some considerable ups and downs. That the charity has changed and delivered most of what it set out to achieve in 2022 is a testament to the commitment and staying power of all those involved.

Operational structures are leaner, qualitative outcomes are more robust, and the client base, contractual revenues and turnover have all grown. It will remain though, a priority to recognise any ongoing deficiencies and ensure that they are addressed, whilst simultaneously exploring new areas in operational development, expertise and collaboration.

This strategy does not represent the charity’s final word on the next four years, but it will set out a programme that will at the very least, ensure some guidance on the direction of travel.



A Statement From The Chair

“As we at Balance begin our journey into the next four years, we have distinctly outlined our focus areas. Throughout this new strategic phase, which constitutes the next stage of our multi-year transformation, our service users remain at the heart of everything we do.

Internally, we will place even greater emphasis on investing in our personnel through learning and development initiatives, empowered managers, and enhanced communication that promotes transparency and trust. At a time when value for money becomes increasingly vital, we will leverage the latest technologies, such as automation, to significantly boost efficiency across the charity, enabling our staff to be more effective and concentrate on critical, user-facing tasks whenever possible.

Externally, we recognise the opportunity to forge stronger partnerships and relationships within the communities we serve. A robust brand and elevated profile will facilitate the acquisition of new partners as we diversify our commercial efforts, while also attracting volunteers and allowing us to harness a wealth of experience from across South West London.

Our strategy outlines a forward-looking direction that harmonises long-term sustainability with the agility required to navigate an increasingly complex funding and operational environment in the UK’s third sector. By cultivating an inclusive culture that celebrates and utilises everyone’s unique skills, we will hold ourselves accountable for the ethical and effective management of Balance’s resources.”

Dr. Marcin Remarczyk



Executive Summary

This Strategic Plan (2026–2030) sets out the next phase of Balance Support CIO’s development following four years of substantial transformation across its services, workforce, operational model and financial profile. Since the publication of the previous strategy in 2022, the charity has strengthened its contract base, diversified its revenue, improved financial resilience, expanded its regional footprint, embedded digital tools across its operations, and delivered consistently positive outcomes for the people it supports.

The charity enters this strategic period from a position of comparative strength. Key operational indicators—including growth in staff numbers, increased support hours, reduced staff turnover, expanding partnerships, higher reserves and improved volunteer participation—highlight a trajectory of sustained improvement. Feedback from people using services and from staff shows strong confidence, high satisfaction and clear evidence that the organisation’s values are embedded in day-to-day practice.

Despite this progress, significant challenges persist across the wider social care environment. Contract rates continue to lag behind the real cost of delivery, workforce recruitment is under pressure, inflation and rising London Living Wage requirements outpace annual uplifts, and large national charities increasingly dominate statutory commissioning.

Legislative and policy changes—including the Fair Pay Agreement, Employment Rights Act 2025, and recommendations emerging from the Casey Review—are likely to intensify workforce and financial pressures.

In response, Balance has defined five strategic aims that will shape its organisational direction to 2030:

- 1. Build community relationships, networks and operational partnerships** that grow referrals, diversify revenues and strengthen market position.
- 2. Harness digital, AI and assistive technologies to increase opportunities for independence, control and productivity** through providing tools for clients and staff
- 3. Ensure professional practice and a commitment to quality** that is consistent across all services and operational disciplines
- 4. Deliver revenue diversification, sustainable investment and cost reduction**, protecting long-term financial resilience and mitigating external shocks.
- 5. Increase opportunities for volunteering** to build community presence and recognition of the charity’s work.

Executive Summary

A comprehensive [Theory of Change](#) outlines how inputs, activities and outputs will contribute to short, medium and long-term outcomes aligned to these aims. The first [18-month delivery plan](#) sets measurable targets for growth in referrals, digital literacy, quality assurance, revenue diversification, community engagement and volunteering.

The plan acknowledges that maintaining current performance will not be enough. Revenue pressures, market consolidation and sector reform demand new operational models, continued renegotiation of contract values, exploration of commercial and private pay opportunities, disciplined cost management and renewed investment in digital capabilities. To remain competitive, the charity must deepen its regional presence, broaden its offer, strengthen its brand visibility and further leverage its evidence base to influence commissioners and partners.

By 2030, Balance aims to be a financially resilient, technologically capable and community-embedded organisation with a stable, skilled workforce and strong market presence.

This strategy positions the charity to maintain high quality, person-centred support while navigating a rapidly changing social care landscape—ensuring it continues to champion independence, empowerment and inclusion for people with learning disabilities.



Vision, Mission and Priorities

The Vision

To empower and support people with learning disabilities and enduring mental health needs, as well as their families, to live the lives they choose.

The Mission

- To support people to live safely and healthily in their own homes.
- Provide the tools and opportunities people need to live independently and successfully.
- Ensure people have choice and control over the support they receive.

The Charity’s Aims 2026-2030

Discussion and re-evaluation of the previous strategic priorities have identified a revised approach against which the charity will shape its progress.

To this end, by the completion of this strategic programme it will:

1. **Build community relationships, networks and operational partnerships that grow referrals, diversify revenues and strengthen market position.**
2. **Harness digital, AI and assistive technologies to increase opportunities for independence, control and productivity through providing tools for clients and staff.**
3. **Ensure professional practice and a commitment to quality that is consistent across all services and operational disciplines.**
4. **Deliver revenue diversification, sustainable investment and cost reduction.**
5. **Increase opportunities for volunteering to build community presence and recognition of the charity’s work.**

The Charity's Values

The charity's values reflect who it is as an organisation and how it represents the interests of the people who work, volunteer or are supported by it. As such they provide a framework on which the charity can strive towards its vision of inclusive, healthy and positive lives for people with learning disabilities and enduring mental health support needs, across the communities in which it works.

 Staff Recognition	Valuing each other in our daily work
 Independence	Helping people to live the lives they want
 Empowerment	Helping people to have a voice
 Professionalism	Providing a reliable and high quality service
 Partnership	Working effectively with other services
 Sustainability	Protecting the future of our work



How This Strategy Was Developed

This strategy was developed through consultation, discussion and desktop analysis of a range of quantitative and qualitative metrics from operations and other relevant data sets.

- Operational staff-led discussion and the identification of their priorities at a special conference held in the autumn of 2025. This was followed by a road-show discussion with the CEO in January 2026.

- Working parties evaluating the charity's performance against four themes: staff well-being, training and development, support and supervision, and internal relationships, also reported findings in the autumn of 2025.

- Discussion and evaluation with the charity's operational leadership and trustees against its 2024 corporate plan priorities and 2022 strategic objectives.

- Consultation and evaluation with people using its services through its annual survey.

- Comparative analysis of its performance against a range of national and regional metrics, in addition to an evaluation of the wider market drivers, likely to influence the direction of travel beyond the publication of this document.

Aims and Priorities for 2026 - 2030

The charity has undergone profound change since the publication of its last strategy in 2022. Growth in its operations, diversification of its contractual relationships, increases in both the number of employees and people using its services, as well as the revision of its quality assurance standards has delivered financial sustainability and a more progressive approach to its work.

However, the charity recognises that to maintain its standards and place within a highly competitive market, identifying a clear direction of travel and a continued commitment to its vision and mission will be critical to its relevance as a social care specialist. Following comprehensive consultation and discussion across the organisation, the charity has arrived at five primary aims that shape its future development, sustainability and culture:

- **Build community relationships, networks and operational partnerships that grow referrals, diversify revenues and strengthen market position**
The charity recognises it operates within a diverse range of interest groups and operational allies. How it brokers, negotiates and influences positive outcomes across each of these sectoral interests is key to its sustainability and success.
- **Harness digital, AI and assistive technologies to increase opportunities for independence, control and productivity through providing tools for clients and staff**
The continued willingness to adapt to and innovate with new technologies will remain fundamental to the charity's commitment to widening leadership and co-design of its work and operational practice.
- **Ensure professional practice and a commitment to quality that is consistent across all services and operational disciplines**
As an increasingly diverse organisation the charity recognises that renewing its social contract with its staff and volunteers is key to retaining committed internal allies. Greater integration, joint service initiatives, training, development and good physical and mental well-being are all critical to good quality assurance.
- **Deliver revenue diversification, sustainable investment and cost reduction**
Diversifying its revenues, delivering sustainable levels of investment and driving down its costs will not

diminish as critical priorities to 2030. The charity will continue to maximise returns on its contractual agreements, improve returns from its privately generated revenues, as well as identify additional options for commercial development where opportunity arises.

- **Increase opportunities for volunteering to build community presence and recognition of the charity's work**
The charity recognises gaps remain in how far it is seen as a community player. Leveraging wider recognition of its work and impact by building new community alliances by increases in its volunteer workforce as well as mobilising participation and access through events and activities will secure wider recognition of what we do and how well we do it.

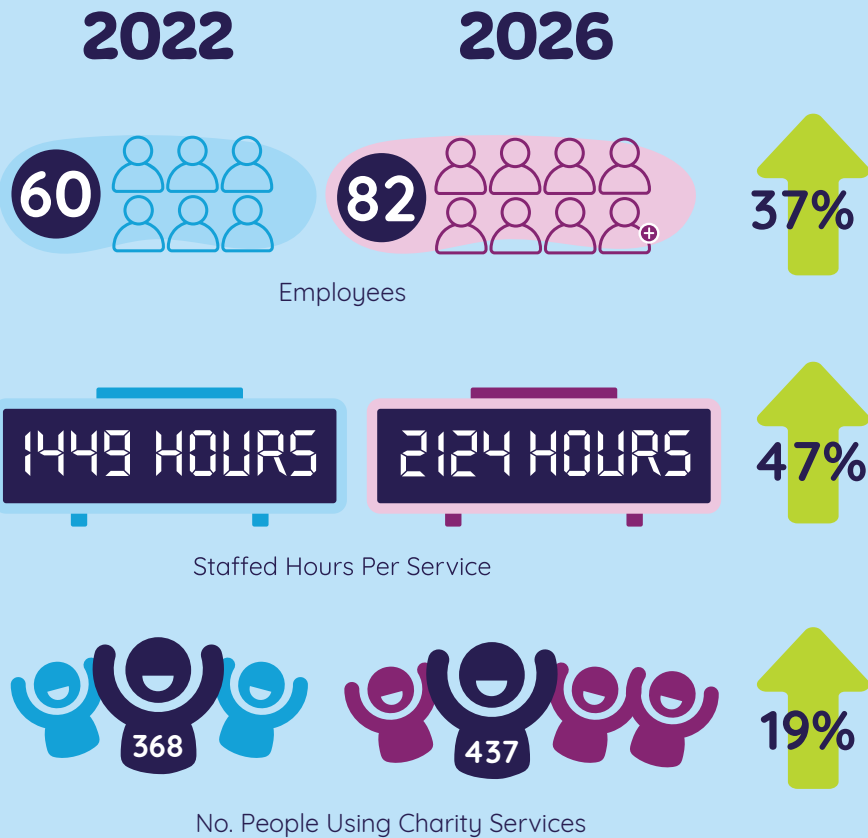
What We Do and How Well We Do It

The charity recognises that understanding the quality and impact of its work, as well as the degree to which it is delivered, is fundamental to reaching a balanced judgement on what happens next.

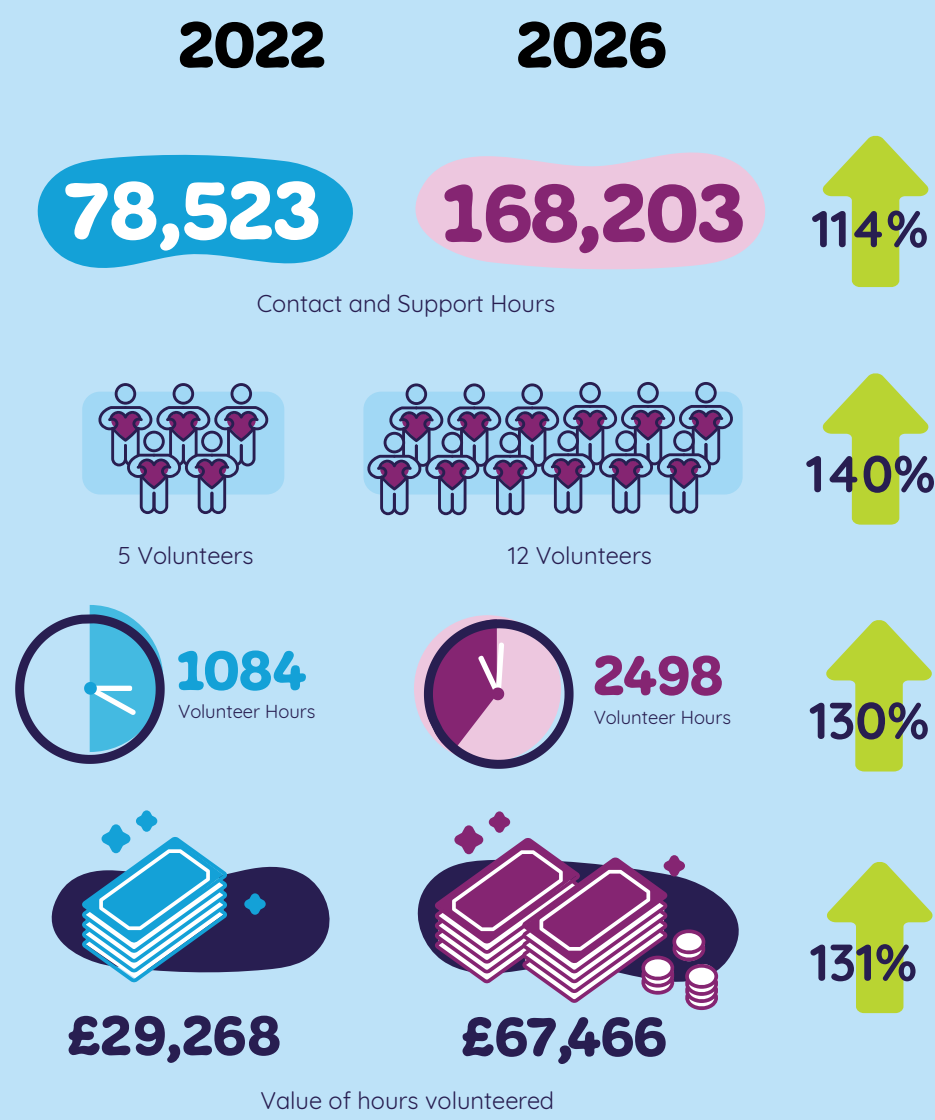
The following section sets out both the numbers relevant to evaluating the efficacy of the charity's operations, in addition to the assessment of those who have used it or delivered its services.



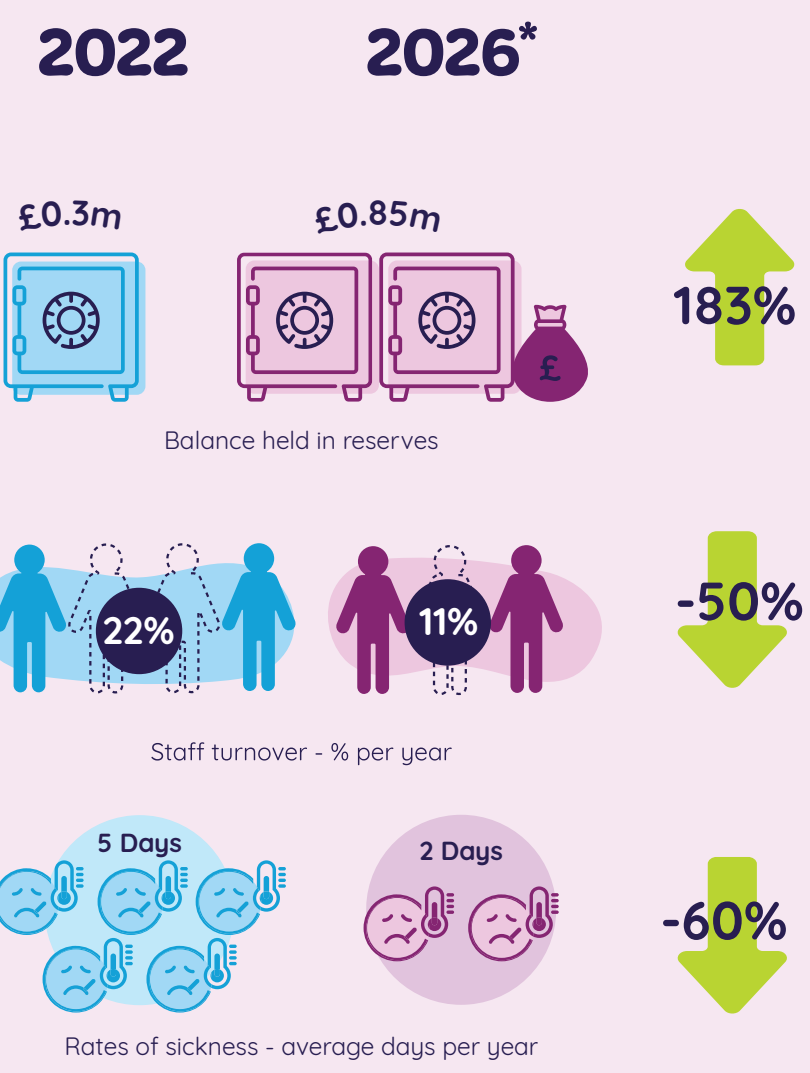
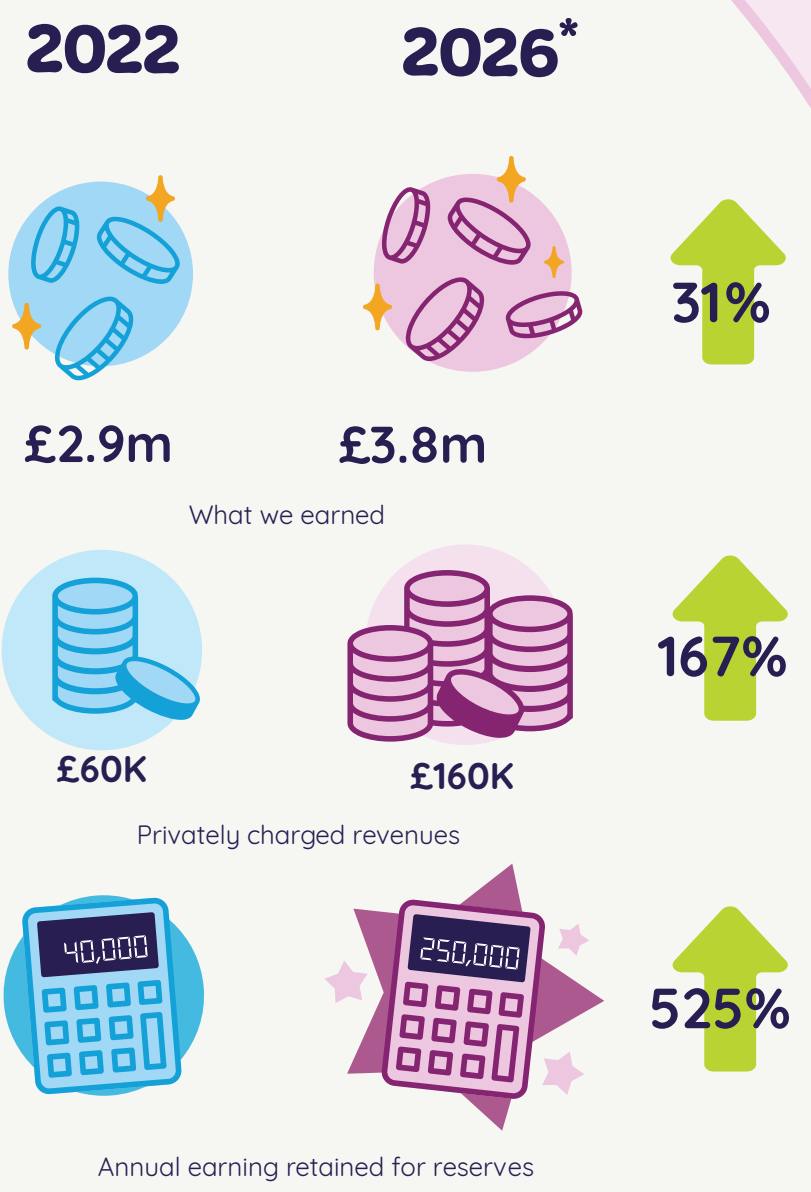
Progress, Development and Transformation - People



Progress, Development and Transformation – People

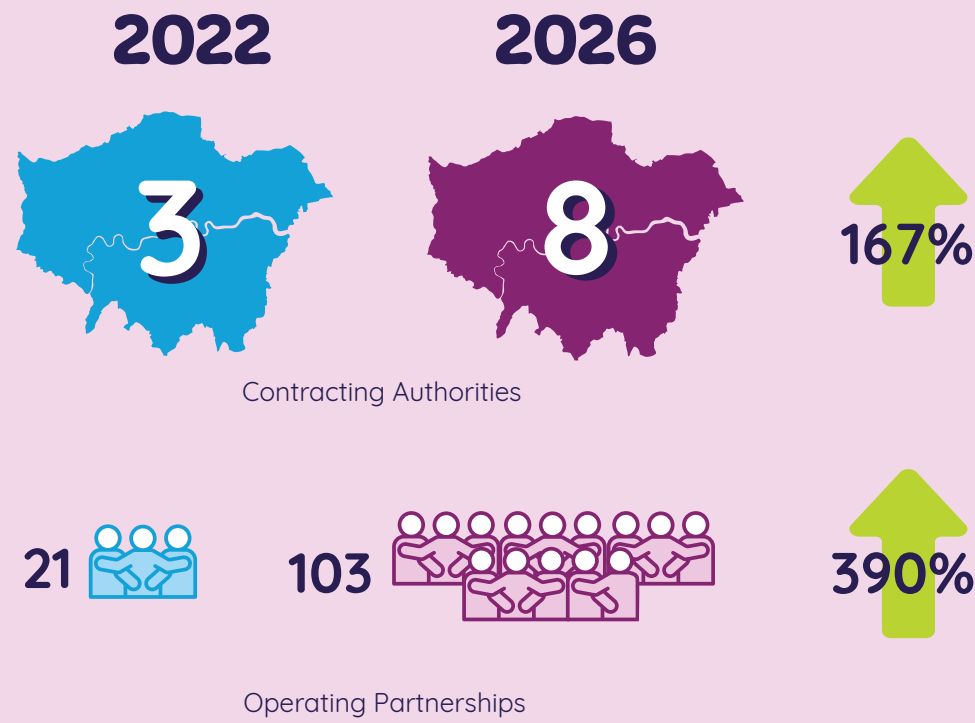


Financial Resilience and Sustainability – Money



* 2026 figures are unaudited

Building Brand, Developing Markets – Allies and Partners



Balance Support CIO Strategy 2026-30

Performance since 2022 has witnessed trends that overall are positive. However, this has substantially depended on the charity’s willingness to evaluate and manage risks in transforming how it works and its resulting impact. The charity has not hesitated on giving notice on contracts that failed to cover the costs associated with their delivery. It has been prepared to reduce headcount quickly to mitigate weaknesses in operating structures and values, and has been assertive in its preparedness to renegotiate its existing terms and financial settlements.

Additionally, the charity has leveraged its strategic relationships to broker opportunities for new investment, targeted new markets and disciplines to widen its geographical footprint, and exploited gaps in local service provision to grow the value of privately funded access to its services.

The charity has (against wider trends for the sector) delivered surpluses against turnover every year since 2022. This has enabled it to invest in new systems to optimise efficiencies across its operations as well as deliver capital improvements to a number of its community assets. It has ensured a continued commitment to support the training and professional development of its staff, to pay a living wage and deliver continuity in the delivery of its services.

Balance Support CIO Strategy 2026-30

Delivering quality, generating impact

The outputs on the previous pages illustrate much of what has changed from a quantitative perspective, however without establishing a values-based prospectus that also measures quality as a focus of activity, the charity will achieve only a limited impact against what is required in meeting its broader mission of change and transformation.

In-year assessment has been collated through survey, discussion and evaluation with the staff, trustees and people who use Balance’s services. It provides a snapshot of the charity’s progress against its strengths-based approach, its values and the baseline parameters that were set in the last strategic review.



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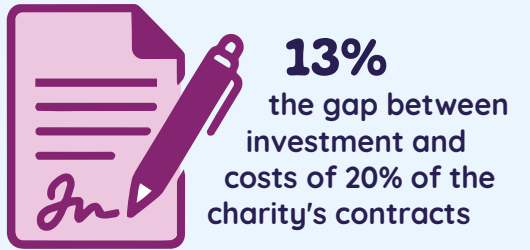
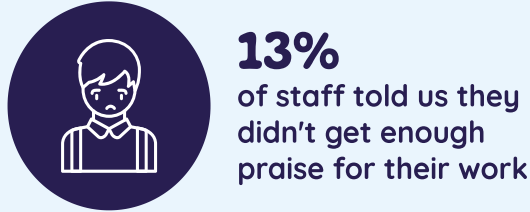
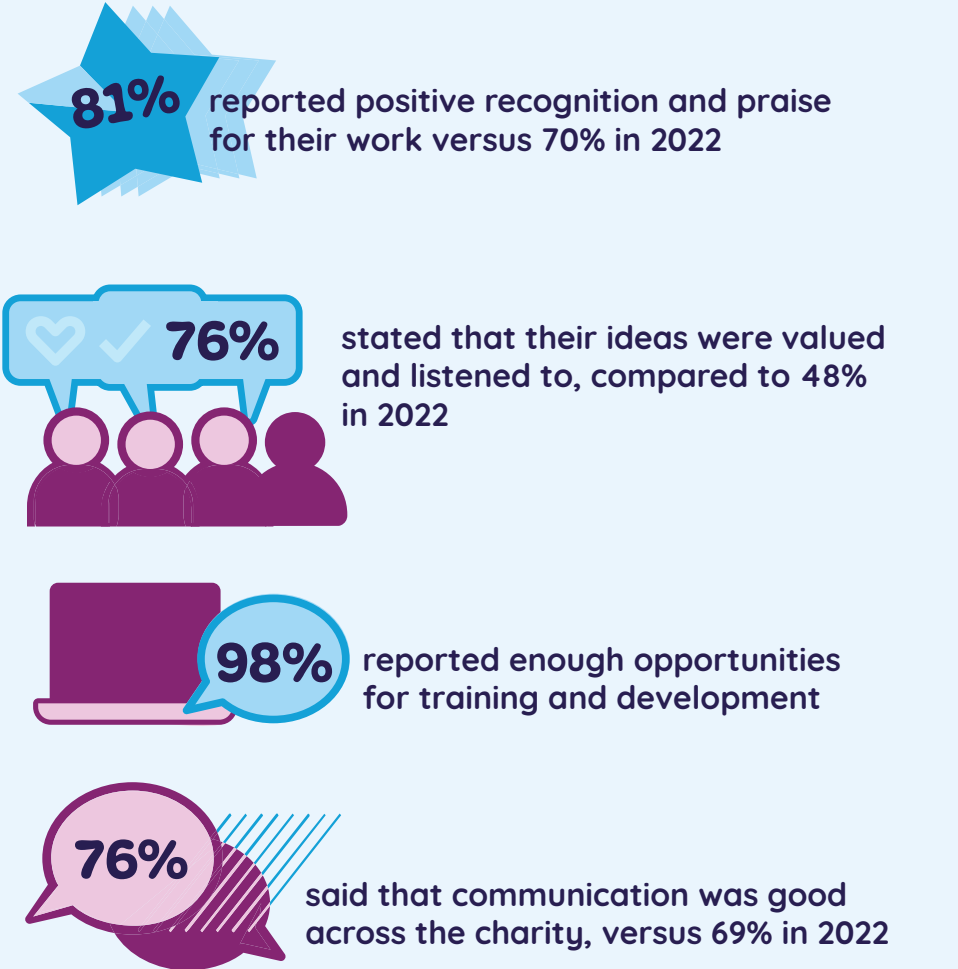
What People Using the Charity's Services Say

The charity surveyed individuals in receipt of support across its services in 2025. Receiving a response rate of 68% against a sample total of 230, feedback was generally positive.



What People Working for the Charity's Services Say

Staff completed a comprehensive survey in 2025 in addition to participating in cross-organisational working parties to measure the charity's efficacy in marrying its values against its working practice. Assessment and evaluation from the staff survey indicated the following against baselines set in 2022:



What Our Staff Say

The working party evaluation, conducted through the autumn of 2025, provides a broader structural assessment of the charity's performance of putting its values into action. All staff were invited to discuss and grade the degree to which the charity delivers its quality standards, values and management support approach. Informing both the workforce plan and this strategy, discussion outcomes provide both a detailed qualitative snapshot as well as future performance benchmarks.

The detail set out in the table overleaf evaluates the performance against four principal domains: support, mentoring and supervision, staff well-being, training and professional development, and internal communication.

The charity's position relative to its performance in 2022 underlines the transformation that has occurred. Structural changes related to growth, operational performance, staff productivity and systemic adoption of mobile and digital technologies have enabled the charity to remain financially sustainable despite challenges inherent to the social care market.

That staff turnover remains low against comparable regional measures is indicative of the charity's efforts to remain inclusive and collaborative despite the process of change that it has undergone.



98% of staff reported having enough training and development opportunities

Domain	What we do well	What we can improve
Support, mentoring and supervision 	- The availability of valuable training - Access to, and the use of mobile technology - Co-designing support plans and personal outcomes with clients - All staff getting their birthday as a day off	- Develop a more effective framework for peer mentoring and ensure compliance with regular supervision - Build on the culture of ongoing learning, openness, and professional growth - All staff have access to and receive the guidance, feedback, and emotional support they need to thrive
Staff well-being 	- The commitment to personal and professional development - The annual commitment to increases in pay - The person-centred approach to the work and the valuing of every client using the charity's services	- Increase flexibility in relation to leave and working hours - Strengthen communication and staff voice in shaping service design - Foster cohesion by providing more opportunities for staff to connect socially and professionally - Embed supervision as a reflective and supportive space for personal development
Training and professional development 	- The time and commitment to training being higher than experienced elsewhere - The availability of advice and guidance from managers and other experienced staff - Access to group-based and face-to-face training, particularly where this allows for exchanges in ideas and knowledge	- Widen the access to and availability of courses that support both personal and professional development - Build on the existing cohort of internal trainers as a knowledge resource to the whole organisation - Peer discussion and action learning to build knowledge and confidence
Internal Communication 	- The wide range of communications channels whether digital or analogue - The availability of mobile technology to all staff - How differing channels are mobilised to build communication and collaboration	- Increase the number of face-to-face meetings to enhance collaboration and cross-organisational cooperation - Identify super-users and systems leaders across the charity who can induct new and existing staff in how to get the best from the charity's digital and communications technology

Understanding the Charity’s Markets and Commercial Challenges

The wider social care market remains a considerable challenge for both charitable and private sector providers and whilst the charity’s exposure to loss-making contracts is considerably reduced against its position in 2022, investment to support the delivery of adult social care and learning disabilities is weighted toward investment from state actors. With contractual averages of £24.10¹ per hour nationally, continuing to maximise a sustainable return (despite the track record to date) will remain problematic. Beyond this there are other considerations that will influence the charity’s strategic model of planning and delivery over the period of this strategy.

The market - threats, challenges and tensions

The value of contractual investment per hour continues to present a major barrier to the viability of the sector. Recent evaluation from the Home Care Association² found average rates paid by commissioning authorities were circa £10 less per hour than the full cost of delivery.

Exposure for social care providers in London is proportionately higher with increased costs and framework rates universally below a sustainable benchmark. This is most evident where there is a contractual obligation to pay the London Living Wage.

Evaluation from HFT/Care England³ further identified growing and unresolved stresses across the market. Citing 55% of providers operating with deficits or declining surpluses (29% of which were in deficit), the situation for charitable providers was even worse, with 54% reporting operating deficits and learning disabilities providers highlighted as a particular area of concern. Competitor analysis across the region underscores this, with high levels of volatility resulting in deficits, falling surpluses and shrinking reserves and closures.

Staffing costs remain a principal pressure area for sector providers. Year-on-year inflation-busting increases in London Living Wage and increased employers’ national insurance contributions have seen 96% of providers⁴ citing the additional associated costs of delivering services as unfunded.

Whilst this charity has largely renegotiated investment to cover costs, there remain considerable weaknesses and risk across the commissioning environment, and exposure to loss-making investment has not been eliminated either from existing relationships or those in the future.

Who the money goes to is also a growing issue of concern to a charitable provider such as Balance. Market consolidation is increasing; research from the Centre for Social Justice Foundation⁵ indicates that 85% of charitable income goes to just 4% of charities. They report an increasing over-reliance by state investors on large national bodies and they are first in line for new contracts and investment “*regardless of their track record or local knowledge*” (CSJF 2024, p.5).

This has resulted in a transfer of income of £4.5 billion from smaller charities to large national organisations in the period since 2020. Despite this charity’s growth since 2022, to remain competitive in a market tilted increasingly away from organisations the size and scale of Balance will remain a considerable threat.

Workforce – a position in flux

Developments across the social care workforce represent an additional area of dynamic change, both in the short and medium term. Legislative, strategic and market determinants are all likely to influence the decisions this charity is forced to make in terms of its continuing commitment to good practice and progressive employment governance.

Consultation and outcomes related to the Fair Pay Agreement⁶ (in social care), the Casey Commission⁷ (independent commission on adult social care) and implications related to the Employment Rights Act 2025⁸ all represent substantial changes to workforce sustainability up to and beyond 2028.

This charity’s commitment to pay rates pegged at London Living Wage, limited use of zero-hours contracts and a range of flexible approaches to its employees’ terms and conditions means it is largely ahead of the curve against both the Employment Rights Act and Fair Pay Agreement. However, implications related to the existing gap between the costs of employing staff and investment norms the sector can expect in meeting them, are likely to grow rather than be resolved.

This charity recognises that a more progressive position is imperative to safeguard better workforce sustainability. Though without an equivalent structural change to how social care is commissioned the implications from both are unsustainable. The charity’s maintenance of its pay differentials, its market competitiveness and its approach to recruitment and retention will all cost more. Analysis from the Health Foundation cited by the Nuffield Trust⁹ bears this out, indicating that even if the entirety of the £500 million planned additional investment to social care was spent on salaries this would fund only 20 pence extra per hour across the social care workforce. Way below what is required to fund the draft proposals set out in the Fair Pay Agreement consultation.

Added to this are more general sector weaknesses likely to heavily influence this charity’s operational performance. Workforce intelligence from Skills for Care¹⁰ evidences several factors that will shape recruitment and retention of skilled and qualified staff: to remain competitive, the charity must ensure its employment offer delivers a strong qualitative return for employees. It will also need to remain imaginative in its recruitment and provide staff and volunteers with tangible benefits that competitors do not.

National Statistics

Vacancy rates at 8.3% remain high against both the NHS (6.4%) and wider economy (2.8%)



Numbers recruited from abroad fell to 50,000 in 2024/25 compared to 105,000 in the previous year



With 1 in 3 new starters recruited from overseas in 2023/24, a continued reduction on this scale will have serious implications for stresses already on the system



More positively, Skills for Care notes; vacancy rates have fallen against highs registered in 2023/24. Overall, more posts have been filled, with rates of turnover 25%, the lowest since 2025/16



Developing need – the relative position in relation to new opportunities

Despite exposure to threats and weaknesses outside of the charity’s control, there remain positive opportunities within what will remain a dynamic regional market. The charity will need to mobilise its central strengths in such a way as to exploit new markets, broker access to new investment and build its brand as a dynamic and positive player across its region.

Population demand for the kind of services that Balance provides is forecast to grow. Indicators from a number of sources evidence a need for the charity to continue its current trajectory of operational diversification:



Strategic Needs Assessments across the region show population growth for people with learning disabilities between 10-22%

The County Council Network forecast a growth of 4.1% for young people registered with an Education, Health and Care Plan against a national figure of 638,000 in 2025 by 2028/29



Making Information Matter found a considerable gap between demand and supply for 18-24 year olds with SEND across London. Estimating in 2021 a 9,000 places shortfall against projected demand

The Health Foundation reports a 10% increase in the number of younger adults making a request for social care support. However, 35% of these requests are unsuccessful



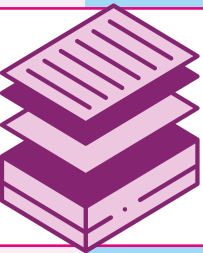
Statutory investment substantially represents the majority of the charity’s working turnover. However, increased revenues from individuals willing to pay privately for access to its services—particularly those seeking respite or transitions-based support—have represented an area of positive and sustained growth (280% since 2022), with families and individuals increasingly approaching the charity directly for advice and support.

The charity will continue to develop a responsive approach to service development and new business. Potential market failures and wider consolidation by charitable and non-charitable providers may also provide access to new markets and revenues.

The National Council for Voluntary Organisations 2025 evaluation – The Road Ahead 2025¹¹ estimates that:



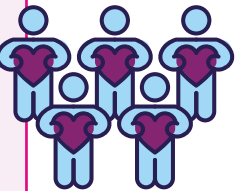
Charities dependent on public support have seen donated revenue fall by 58% since 2019



The consequence of this and other factors has seen grant applications surge by a reported 30-50%, with some foundations seeing their number double



Whilst statutory funding has fallen as a proportion of charity income, for those with revenue of more than £1 million annually, it has gone up



Under revised commissioning regulations, public sector commissioners are required to “maximise procurement spend” with voluntary, community and social enterprise (VCSE) organisations

Understanding the Charity’s Markets and Commercial Challenges

This may appear to represent a potential threat to the charity’s current position, however, with a limited exposure to grant-based revenue, individual giving and community-based income generation to sustain its business, the charity can continue to mobilise a flexible approach to market development and alternative sources of revenue.

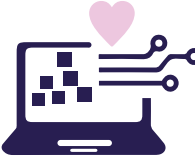
And whilst organisations with a national footprint increasingly dominate the supply of social care services, exploitable opportunities will exist for medium sized, regional players with an embedded community brand, high quality standards and recognisable impact on the lives of people who use their services.

Digital and Artificial Intelligence – building on what we already do well and strengthening areas for further development

Whilst the charity’s 2025 digital skills audit established that considerable progress had been made in complying with the national benchmarks set out in the ASC Digital Skills Framework¹² and the 2025 Charity Digital Skills Report.¹³ It will need to build on these achievements and develop new approaches in the role digital and AI plays in accessing new markets and widening recognition of the charity’s work.

Reported trends indicate the growing role that fully mobilising Digital and AI will have in driving innovation, communications and the influencing of decision makers. Although the charity’s approach to its digital resourcing has been positive, potential gains from AI in building the approach to analytics, administration and digital marketing are still a work in progress.

Internal evaluation established the following key metrics in terms of the charity’s investment to date in its digital literacy:



An average of 81% of staff reported they were confident or very confident in using mobile phones and computers to deliver their work



Circa 86% of staff reported they were able to mobilise digital technology to support learning and accountability for people in receipt of the charity’s services



90% of staff reported that they had the necessary skills and knowledge to mobilise digital technology in their day-to-day work

Compared with 40% of charity respondents citing poor staff skills as a barrier to progressing a flexible digital approach, Balance is in a positive relative position in terms of capability.

Certainly, this commitment to digital reform advantages the charity in its preparedness to increase its approach to AI beyond its existing limited application in administrative, fundraising and financial practice. However, in an echo of findings across the sector¹⁴, just keeping up with the sheer pace of change presents both a management and intelligence issue, even where the charity is keen to exploit its opportunities

The other unavoidable concern, particularly given the charity’s size, relates to its management and governance in mitigating exposure to breaches in its data, financial and administrative safeguards. The policy environment requires recognition of the new realities, and the implications of AI regarding the charity’s values should also be considered. Where assistive technology and digitisation impacts on the lives of people it supports, protecting their interests will also be paramount.

Brand Development – Strengthening Visibility, Recognition and Influence

Brand Purpose and Positioning

The charity’s brand represents more than its visual identity; it communicates its impact, values, and credibility as a specialist social care provider. With survey data showing 98% of people using the charity’s services believe its work improves their lives, and 97% of staff report that their work puts the charity’s values into action, the organisation has a strong evidence-based brand proposition.

These strengths provide a foundation for a renewed brand purpose that emphasises:

- The charity’s values-driven approach to independence, empowerment and inclusion
- Evidence of consistently improving outcomes for people using services
- A growing regional footprint and reputation for innovation, partnership and quality

Over the strategic period, the charity will articulate a refreshed messaging framework to ensure a consistent voice across all communications, materials and digital properties.

Brand Narrative – Telling a Clear, Compelling Story

Given the competitive pressures of a market increasingly dominated by large national charities, the charity will strengthen its narrative by highlighting differentiators evidenced throughout this strategy. These include:

- A track record of delivering surpluses while maintaining high-quality support
- Deep community embeddedness and a rapidly expanding partner network
- Innovative digital and assistive technology adoption that widens independence and productivity
- A highly committed workforce with strong values alignment and low turnover

These narratives will be embedded into impact reports, case studies, promotional activity, digital content and fundraising material to strengthen public understanding of the charity’s distinct contribution.

Brand Visibility and Market Presence

Although digital engagement has grown—with 1,400 new website users and increased social media interaction—significant opportunities remain to increase visibility among potential referrers, local communities and commissioners.

To anchor its position as a specialist regional provider, the charity will:

- Expand thought leadership activity through blogs, opinion pieces and sector commentary.
- Develop targeted communications for commissioners and statutory partners emphasising quality, outcomes and reliability.
- Strengthen public-facing brand presence through community events, volunteering campaigns and partner-led initiatives.
- Increase the volume of video-based storytelling to highlight service user voices, innovation, impact and staff expertise.

Brand Development

This activity will support growth in referrals, enhance the charity’s competitive edge and reinforce its value proposition.

Brand Consistency and Quality

As the organisation grows, ensuring consistency across brand materials, service environments, messaging and digital platforms will become increasingly important. The charity will therefore:

- Update visual identity and brand guidelines where needed to ensure clarity, accessibility and alignment with organisational values.
- Standardise templates for reports, presentations, staff communications and service information.
- Develop consistent messaging for stakeholders, including people using services, carers, commissioners, and community partners.
- Enhance internal training so staff feel confident representing the brand in their work and communications.

This work will reinforce professionalism and strengthen stakeholder trust.

Brand Trust and Social Proof

The charity benefits from strong qualitative and quantitative endorsement—including high levels of satisfaction, confidence, and quality-of-life improvement reported by people using services.

To maximise the impact of this social proof, the charity will:

- Integrate real stories, testimonials and service user experiences into marketing and reporting.
- Use data-driven impact evidence to communicate achievements clearly and transparently.
- Promote the charity’s commitment to values, quality assurance and continuous improvement.

These approaches will help reinforce the charity’s credibility among commissioners, community stakeholders and families.



97% of staff report that their work puts the charity’s values into action

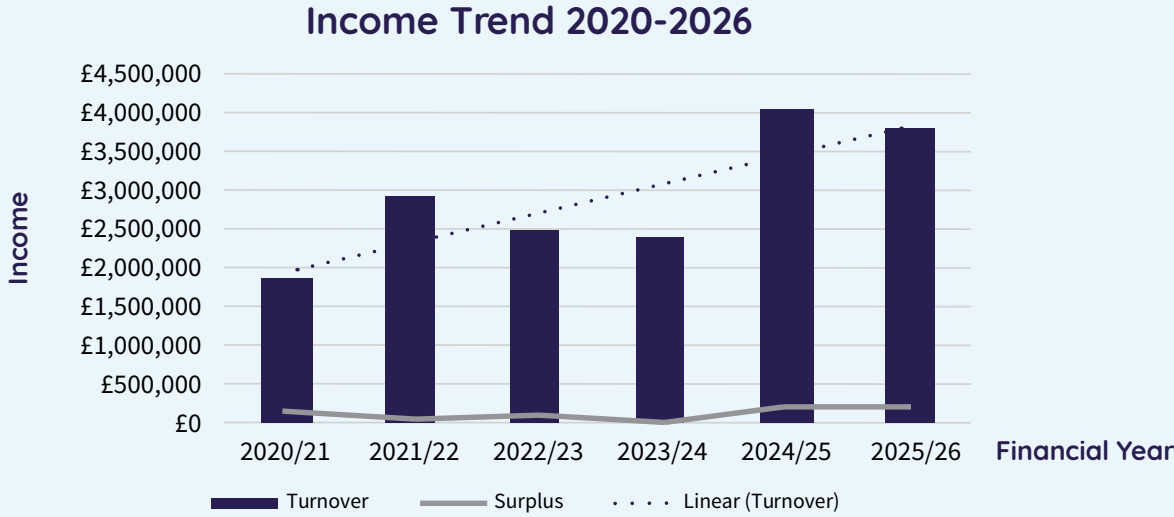
Building Financial and Organisational Resilience

The charity has continued to rationalise its costs, identify options for savings in its administration and overheads, and diversified its sources of income. This will continue to be a developmental priority as challenges remain. There are elements that remain out of its control to which the charity is unavoidably subject. The London Living Wage, for example, has increased by 34% in the period since the previous strategy, far outstripping average rates of net investment from its commissioning authorities.

The national picture reinforces this tension with the King’s Fund noting¹⁵ that, on average, real-terms increases in rates for services to working age adults have risen by 13% since 2016. Whilst London trends higher annually with rates between 5 – 7%, once adjusted for inflation and set against external market pressures this still leaves considerable gaps that the charity will need to address.

Revenue Development since 2022

Despite this, the generally upward trend in the charity’s income has ensured an ability to invest in its staff, physical assets and digital infrastructure. The figures below represent the position since the charity commenced its transformation project in 2022.



Set against structural weaknesses beyond the charity’s control, risks remain in mitigating the impact of poor investment levels against growing costs. With additional likely resource challenges on the horizon from the Fair Pay Agreement, 2025 Employment Act and decisions related to the Casey Review, all likely to influence the charity’s financial decision-making for the period of this strategy.

Internal Controls

To this end, despite increased revenue, staffing and services since 2022, the charity has continued to drive efficiencies and savings across its operations.

In 2025 alone:

- Use of technology has reduced the need for staffed administration costs by £55,000.
- Consolidation of operational management has reduced costs and overheads by a net balance of £54,000 against planned spend.
- Increased volunteering in the Horticulture service has delivered additional in-kind value against the 2024 baseline equivalent to £37,000, reducing the need to recruit paid staff equivalents.

- Commissioned investment has been renegotiated annually, delivering increases in excess of the charity’s costs in all but one service domain, maintaining the trustees’ commitment to full cost recovery across the whole of the charity’s business activity.
- Contracts servicing the charity’s digital administration and its operational maintenance needs are reviewed regularly and assessed against alternative market options.
- With 85% of the charity’s costs related to employing staff, real-terms differentials between London Living Wage and average uplifts in contractual investment will continue to have a disproportionate impact on sustainability. Particularly where any decisions related to the Fair Pay Agreement are not matched by real terms investment to meet the costs of delivering it.

Potential inflationary impact

Despite this, there remain financial tensions that the charity will need to address as part of a continued programme of cost management and rationalisation.

- Agency costs remain stubbornly high, with registered spend in 2024/25 and 2025/26 more than £300,000. The charity will target a minimum reduction of 50% against the 2025/26 outturn to deliver improved performance across 2026/27.
- Development priorities in relation to communications and volunteer management represent an additional £52,000 not covered by existing contracts.
- Given the transformation in the charity’s profile since 2022, tracking progress to 2030 against what will remain a highly dynamic regional and national background presents some challenges in reaching a balanced view. Based on the charity’s internal financial assumptions and set against both historic precedent and other acknowledged sector concerns, the charity has evaluated their likely impact where trends continue based on the following:
 - Investment values remain at 4% as an average uplift per borough per year.
 - That, excluding salaries subject to London Living Wage, rates of pay continue to average circa 3.5% annually, based on the charity’s inflation plus formula and historic trends.
 - Inflation against all other costs has been evaluated at a conservative figure of 3%.



A do-nothing approach based on these assumptions will leave the charity failing to meet its core aim of financial sustainability. In addition to maintaining its existing negotiating position with its commissioners to generate investment benchmarks at full cost recovery, the charity will need to maintain a commitment to diversify where and how it generates its turnover.

- Whilst growth in privately charged services will continue to be a priority, it is unlikely that as a potential level of development this will match the increases posted since 2022. Particularly where there are constraints in the charity’s capacity to deliver it.
- Developing the regional footprint beyond the existing geography will also remain key to widening the charity’s market operations, though only on the basis that this aligns with the charity’s existing position, that new contractual options are financially viable and full cost recovered.
- Despite growing evidence that demand is outstripping the availability of traditional sources of income from charitable fundraising, a commitment to exploit alternative sources of revenue through trusts, community fundraising, sales and individual giving should increase to drive innovation and recruit new skills.

The charity’s principal commitment remains one built on high-quality interventions, long-term financial sustainability and secure governance. Financial growth will only be considered as part of this consolidated approach, not for its own sake.

Making our cash reserves work harder in the long run

Socially responsible investment will also feature as a means of maximising returns on the charity’s strategic reserves. Capital investment will be diversified in line with its governance standards and strategic priorities, securing returns that can be reinvested back into services or specific projects as the capital grows. Investment management will be based on the three following designations:

- **Short term reserves:** Will remain readily accessible to meet cash flow needs, prioritising stability over returns and accepting the impact of inflation.
- **Medium term reserves:** (2–5 years) allow for some volatility. Investments will focus on low-risk, income-generating instruments that preserve capital while aiming to outpace inflation.

Long term reserves: (5+ years) can tolerate greater volatility to achieve growth and generate income. Returns may be reallocated to support shorter-term needs where appropriate.

The charity views an active investment portfolio as key to its continued financial diversification.



Managing Risk

The current strategy represents a balanced assessment of the charity’s medium-term targets set against a dynamic external market, as well as its continuing organisational obligations as defined by the charity’s governance and constitutional frameworks.

The charity recognises that risk functions both as a control and as a potential means to kick-start new areas of work and creativity. Reviews of policy, governance, quality assurance, digital and financial security represent examples of how the charity has continued to assess key areas of its performance and operational oversight as an ongoing exercise. It recognises that risk is not fixed. Trustees have remained proactive in both mitigating areas of exposure as well as shaping an approach to managing those that it accepts.

The information set out over the next two pages represents the charity’s current assessment of its primary areas of risk. Over the period of this strategy, some fluidity will be expected within each domain. However, evaluation and benchmarking of the current position gives a measure of how successful the charity ultimately is likely to be in reducing any ongoing exposure.



Managing Risk

RAG Status	Risk Category	Description	Board Focus	Mitigation Strategies
Red	External Market and Commissioning	- Contract rates remain below cost of delivery - London Living Wage outpaces commissioner uplifts - Market consolidation favours national providers	- Strengthen negotiating strategy - Full-cost recovery mandate - Diversify income	- Implement full-cost recovery tools - Build partnerships - Expand non-statutory income - Develop commissioner market intelligence
Red	Financial Sustainability and Inflation	- Staff-cost inflation and LLW increases (34% since last strategy) outpace investment growth - Unfunded development priorities - Risk to reserves	- Inflation modelling to 2030 - Reserves strengthening private-pay growth	- Model multi-year inflation scenarios - Set reserve-building targets - Expand private-pay offer and pricing review
Amber	Workforce Sustainability	- High regional vacancies and falling overseas recruitment - Fair Pay Agreement & Employment Act increase cost pressures - Agency spend	- Workforce pipeline - Retention strategy - Agency reduction plan	- Introduce talent pipeline programmes - Strengthen retention incentives - Build in-house staffing bank to reduce agency reliance
Amber	Operational Capacity and Quality	Gaps in supervision, mentoring, communication and cross-organisation consistency identified via working groups	- Supervision compliance dashboard - Expand internal trainer’s reflective practice	- Standardise supervision processes - Deploy training pathways - Embed reflective practice across teams
Amber	Regulatory and Compliance	Forthcoming Fair Pay Agreement, Employment Rights Act, Casey Commission create cost and compliance pressures	- Compliance mapping - Legal oversight - Policy updates	- Conduct compliance audits - Update HR/governance policies - Schedule regular legal reviews

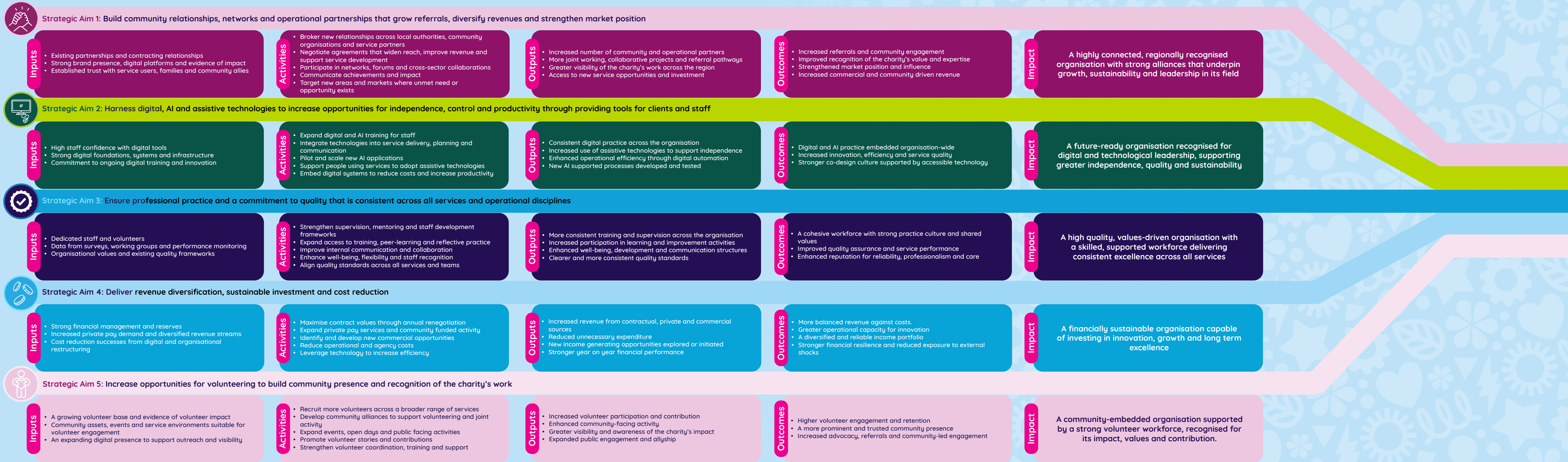
RAG Status	Risk Category	Description	Board Focus	Mitigation Strategies
Amber	Digital and AI Adoption	Strong digital foundation but AI adoption risks outpacing governance and staff capabilities	- AI strategy - Cyber assurance - Digital super-users	- Develop safe-use AI framework - Expand digital training - Strengthen cyber-security testing
Amber	Market Position and Brand Visibility	Large national charities dominating market share competitive threat to regional players	- Impact reporting - Partnerships - Community engagement	- Targeted visibility campaigns - Enhance impact reporting - Diversify partnerships with local authorities and communities
Amber	Demand Growth and Demographics	Projected growth in Learning Disability population, EHCP demand, and SEND shortfalls exceed current capacity	- Scalable models - Growth strategy for transitions market	- Design scalable service models - Increase capacity planning - Expand transitions provision
Amber	Governance and Oversight	Organisational complexity growing, risk management and decision-making structures need strengthening	- New governance framework - Quarterly risk heatmap - Board development	- Implement governance review - Roll out structured risk-reporting cycle - Enhance Board capability programme
Amber	Volunteering Development	Expansion of volunteering without capacity to manage it safely	- Governance - Investment in resource - Management support	- Ongoing review of relationship with community partners - Co-production of volunteers - Maximising capital returns on investment, making the charity's money work harder

The Charity’s Theory of Change

This integrated Theory of Change sets out how the charity will achieve the five strategic aims that underpin its Strategy 2026–2030. It outlines the inputs, activities, outputs, outcomes and long-term change that will collectively strengthen the charity’s sustainability, influence and quality of support for the people who access its services and support.

The Charity's Theory of Change

The Charity's Theory of Change



Cumulative Impact by 2030

- A catalyst for independence, opportunity, and inclusion for people with learning disabilities
- A charity recognised for delivering high-quality, person-centred services
- A values-driven employer with a stable, skilled, and supported workforce
- A trusted and influential community partner with a strong market presence
- A financially resilient, innovative and technologically capable organisation



Delivering the Charity's Priorities



Analysis and assessment of the charity's outputs since 2022, the shift in its markets, coupled with consultation across its governance and operational disciplines have ensured as wide a representation as possible in building a collaborative response.

Much of what the charity already does requires renewal as opposed to transformational change:

- Review and re-evaluation of how well the charity meets its quality assurance standards, operational parameters and contractual obligations will continue much as before.
- A continued commitment to modernise, streamline and reframe innovation through new technology, adaptive system-based applications, digital support services and AI will remain part of the charity's performance development profile.
- Making the most of both opportunistic and planned approaches to business development will also continue to drive growth and financial sustainability in much the same way as it has done to date.

However, given the distance travelled since 2022, the continuing challenges across the social care market, and the increasingly constrained sources of income traditionally open to charities such as Balance, there is still considerable work to be done.

- The charity will build a wider public recognition of not only its presence within its regional markets but its impact as a specialist provider with high-quality standards.
- It will need to consider new areas of service development, partnership vehicles that support access to new markets and a continued willingness to invest in its infrastructure to secure sustainability and resilience.

A prospectus for the future

Growth in the charity's regional footprint has delivered increases in turnover, new contractual opportunities, improvements in its strategic reserve and growing recognition of its work. Adaptation and continued extension of this approach will remain key to the long-term development of the charity in maximising its gains to date.

The matrix opposite identifies four key areas the charity will consider in driving its business development over the next four years:

The areas of its work in which it is **highly adept**, and with investment offer potential for optimising its market position and driving increases in revenue.

Established areas of service delivery that generate sustainable positive returns and require limited adjustment to maintain their efficacy.

Current areas of the business that generate proportionately low returns against turnover, but with substantial **investment** could net a considerable improvement against the existing baseline.

Elements of the current portfolio against which there are substantial **concerns** on the value to the charity, which it may consider divesting itself from.

The charity will continue to develop new markets. Its commitment to quality services, high professional standards and a strengths-based delivery model are positive selling points against regional competition.



Building on its existing outward-facing approach, it will initiate new delivery partnerships, widen its contractual portfolio and increase accessibility to its services from a range of new and existing stakeholders.

It will deliver capital growth to support investment by negotiating and/or maintaining healthy surpluses for those services that already over-perform. It will mobilise its market edge in operational and administrative technology to improve further existing efficiency gains and thereby the financial performance of both profit-making and loss-making areas of the business.

Delivering the Charity’s Priorities

It will additionally build on grant-based capital and revenue-based investment to test out new models of delivery that build on or substantiate pre-existing areas of its work.

Whilst market and financial growth may be comparatively low (privately paid and commercial services) as a proportion of the charity’s turnover, the charity will continue to optimise its facility to generate operating surpluses, act as a gateway to the charity’s wider offer, promote the charity’s work in untapped markets, build brand, and shape new business partnerships.

As it diversifies and maintains its operating surpluses it will continue to review those areas of the business that remain stubbornly loss-making. The charity has not historically backed away from exiting poorly remunerated contracts. Given the remaining risks with some of its existing partnerships, and increasing market insecurity across the sector, it will continue to formulate a long-term approach that is pragmatic and sustainable.

The delivery plan overleaf encompasses both the proposition identified above as well as incorporating the Theory of Change set out earlier in this document. This plan represents the first 18 months of the strategy timeline and will be revised in Year Two of the delivery programme.

Strategic Aim 1 | Build community relationships, networks and operational partnerships that grow referrals, diversify revenues and strengthen market position

What we will achieve	What we know now	What we will do	How we will do it	What will be the difference
Increased referrals and community engagement	62 - The number of new referral starts in 2025/26 and 2024/25 10% - Support hours growth in 2025/26	10% - Total increase new referrals from all sources 50% - Increase in the total self-referrals from 8 to 12	Broker new market opportunities to grow influence and revenue Develop new service options and specialisms	An increase by 6% real terms growth in contractual turnover against 2025/26 baseline
Early expansion into new partnership driven service areas	103 – The number of differing operational and support partnerships	2 x Delivery partnerships formalised and delivered	Cultivate new delivery partnerships to add skills, knowledge and resources to existing service offers	An increase by 6% real terms growth in contractual turnover against the 2025/26 baseline
Improved recognition of the charity's value and expertise	8 – The number of commissioning authorities buying services in 2025/26 against 3 in 2022 280% - The growth in private revenues since 2022	At least 1 x additional contract with another local authority or ICB 10% - Increased private income against 2025/26 baseline	Promotional/segmented communications to highlight performance, service impact and quality against other market players Target new areas and markets where unmet need or opportunity exists	6% - Increase in contractual turnover against 2025/26 baseline New audiences and increased public recognition of the charity's work
Strengthened market position and influence	27% - Income growth since 2022 Visibility increases awareness among referrers, partners and community agencies	6% - Growth in turnover against 2025/26 baseline	Negotiate agreements that widen reach, improve revenue and support service development Produce brochure setting out details of 18 – 26 offer	6% - Increase in contractual turnover against 2025/26 baseline
Increased commercial and community driven revenue	£2000 – The value of commercial and sales revenue in 2025/26	£2000 increase in retail and catering sales against 2025/26 outturn	Increase income-generating initiatives in horticulture that exploit its specialism	Commercial revenue achieves 0.2% of total turnover

Strategic Aim 2

Harness digital, AI and assistive technologies to increase opportunities for independence, control and productivity through providing tools for clients and staff

18 Month Plan



What we will achieve	What we know now	What we will do	How we will do it	What will be the difference
Higher confidence and consistency in digital delivery	86% - Percentage staff able to positively mobilise the charity's digital resources in their work	1 x Digital competency review annually	Annually review individual digital capabilities as part of staff PDR process	90% - Staff positively able to mobilise digital resources and tools
	42% - Staff can't or wouldn't be able to help service users with technology that can help them enhance their lives or care	3 x Digital champions per service to offer peer support and knowledge	Identify options for increase training and peer-based support to maximise digital applications across the charity's work	75% - Indicate confidence in supporting users with technology
Greater independence and control for people using services	6 – The number of individuals trialling assistive technology in 2025/26	Evaluate initial cohort use and benefit	Review and integrate assistive tech into wider areas of service delivery	90% - Clients surveyed indicate positive support from staff in using digital and assistive technology
Improved productivity and reduced administrative burden	100% - Level of digital adoption across the business	1 x Systems review and evaluation	Work with digital suppliers to identify improved tools & performance options	100% - Managers and administrators indicate confidence in using support technology
	40K - Reduction of one FTE administrator in 2025	Work with digital suppliers		50% - Additional efficiency savings against 2025 outturn
Digital and AI practice embedded organisation-wide	2025 - Cyber Essentials Certificated and maintained compliance with ASC digital Skills framework	100% - Staff complete AI risk and adaption training	Identify and implement training on AI basics for managers and team leads	Charity increases its SAPA average compliance standard to 65% from 60%
	30.0 – KnowBe4 cyber risk score registered as low	30 - Target compliance or lower	Commission training in learning development support chain and key suppliers	Compliance target is maintained at 30 or lower
	30K - Investment in training 2025/26	£600 target spend per head on staff 2026/27		90% - Staff agree they have the skills to do their job
Increased innovation, efficiency and service quality	70% - Managers and team leads indicate they have enough confidence to lead in the adoption and of digital tech	100% - Managers and team leads work with corporate services to develop 1 x project on AI adoption in their service	Pilot & scale new AI/digital applications	100% - Managers and administrators indicate confidence in using digital support technology
	2 x Learning and development projects with Kingston University	Leverage additional partnership with corporate learning institutions	Review and revise all digital policy areas to comply with AI and data regulation	90% - Staff positively able to support
		Identify or commission training partnerships to drive knowledge		
Strengthen governance and operational controls in oversight of AI administration and support	35% - Charities already using AI to manage the delivery of operations according to the Charity Commission	Review and strengthen all AI governance in relation to AI and digital support systems	Partnership with National Cyber Resilience Centre group and IT supplier ASL	100% - Policy and operational governance reviewed and revised against industry standards

Strategic Aim 3

Ensure professional practice and a commitment to quality that is consistent across all services and operational disciplines

18 Month Plan



What we will achieve	What we know now	What we will do	How we will do it	What will be the difference
Higher staff confidence, satisfaction and retention	11% - Average rate of staff turnover 2025/26	1 x Annual all staff conference	Consult with staff and identify options for more collective and social activity to build cohesion and support across teams	90% - Staff surveyed indicate their ideas are listened to and acted on
	76% - Percentage of staff stating their ideas are listened to	1 x Staff Activity Committee to generate and oversee initiatives		90% - Staff surveyed in year or at exit indicate Balance is a supportive and collaborative employer
	100% - Compliance with London Living Wage recommendations annually	Benchmark and align all salaries to regional and/or national benchmarks		
Improved internal consistency and professional practice	£650 – Per capita, invested in training in 2025/26	70% - Day centre staff complete non-verbal communications training	Maintain commitment to professional development through performance review process	90% - Wandsworth staff indicate improved confidence in non-verbal communications and behaviour management
	64% - Percentage of staff in care roles qualified to level 2 care certificate	100% - Staff complete Oliver McGowan training	Mobilise internal skills and knowledge to develop internal training and peer support	100% - Staff compliant with the charity's key working quality standards
		100% - Care staff trained to NVQ level 2 Care Cert		
A cohesive workforce with strong practice culture and shared values		2 x Internally designed courses in key working and leadership	Performance Development Reviews (PDRs) and operational development standards	
		20% - Staff training is elective		
	97% - The percentage of staff indicating their work puts the charity's values into practice	1 x Annual Staff conference	Identify options to increase staff voice in shaping services, charity governance and leadership in service design and delivery	90% - Staff surveyed in year or at exit indicate Balance is a supportive and collaborative employer
Improved quality assurance and service performance consistent with future demands	20% - Staff who leave Balance after less than 3 years against 53% for the region	2 x action learning set per team per year		
		90% - Staff to complete exit interview		
Enhanced reputation for reliability, professionalism and care	Level 1 – Compliance Charity Quality Standards	1 x CQS evaluation completed to level 2	Resilience test all systems and operational approach against externally evaluated standards and apply learning	Charity achieves level 2 CQS
	Good – CQC rated	1 x pre-qualification internal audit against CQC standards		Charity achieves at least a good rating from CQC
Enhanced reputation for reliability, professionalism and care	(As above)	100% - Compliance with contractual ratios for client support	Review and widen participation in client and family reviews	90% - Families/carers and people using the charity's services would recommend it to others
	94% - The number of people using Balance services who would recommend us to friends and family		Monitor and evaluate that support standards at least annually	

Strategic Aim 4 | Deliver revenue diversification, sustainable investment and cost reduction

18 Month Plan



What we will achieve	What we know now	What we will do	How we will do it	What will be the difference
More balanced revenue against costs	30% - Proportion of contracted revenues failing to deliver full-cost returns	Agree reductions in remaining shortfalls by 50% to limit continuing risk	Maximise contract values through annual renegotiation	50% - Reduction in the financial gap in our loss-making contracts
Increased financial resilience	3% - Average annual surplus on turnover since 2022	Improve surplus position to 4% overall against average	Identify and develop new commercial opportunities	Surpluses are maintained at an average of 4% over the strategy timeline
	£800K – Unrestricted reserve year end 2025/26	Increase unrestricted reserve to £1 Million	(As above)	25% - Improvement in the charity's reserve
	160% - Value of growth in reserve since 2022	Increase by 25% against current benchmark		
Greater operational capacity for innovation.	£160K – Level of capital investment to support innovation since 2022	Fundraise for and deliver at least 2 x additional investment projects	Accessibility and user-based evaluation	Revised aids and adaptations in at least 2 x service
		£400K minimum level investment portfolios 2026	Use returns from investment portfolio to support innovation and change	Improved capital diversification by 10% against 2025/26 baseline
Stable cost recovery across services.	-66% - Forecast change in surplus from 2025/26 - 2030	Investment delivers at least to current benchmark or to target of 4% surplus per annum	Reduce/manage operational and agency costs	Surpluses are maintained at an average of 4% over the strategy timeline
	54% - Level of charity providers in social operating with deficits			
A diversified and reliable income portfolio.	94% - Level of revenue from statutory contracts in 2025	Increase current benchmark to 8% of non-statutory revenues	Expand private pay services and community funded activity	Improved capital diversification by 10% against 2025/26 baseline
	£62K – Value of grant investment into the charity in 2025/26	Increase in grant revenues by 50%		
Stronger financial resilience and reduced exposure to external shock.	£4K - Value of interest returns on the charity's unrestricted reserves	Reserve investment secures minimum return of 12K average per annum	Investment for fixed period based on average return of 3.4% above CPI	Improved revenue diversification by 2% against baseline
	£10 – The shortfall in hourly rates paid to ASC providers assessed by the Home Care Association	Agree reductions in remaining shortfalls by 50% to limit continuing risk	Continue to negotiate and broker increases that reflect the full cost of delivery	50% reduction in the financial gap in our loss-making contracts

Strategic Aim 5 | Increased opportunities for volunteering to build community presence and recognition of the charity's work

18 Month Plan



What we will achieve	What we know now	What we will do	How we will do it	What will be the difference
Improved recognition of the charity across local communities	£1,800 – Value of individual giving to the charity across its region	Increase donations by 50% against baseline	Campaigns and calls to action through online and digital media	Donations from all sources increased to £2,700 in Year One
	1,500 – Number of new users visiting the charity's website in 2025	20% increase against all baselines in online and digital views/follows	Blogs, video case studies, promotional campaigns collaborations	Increased visibility, referrals and public recognition
	2024 Nominated finalist in Surrey Care Awards	Increased brand visibility and recognition among commissioners and communities	1 x Corporate plan circulations with UTM to assess user engagement beyond the plan	New audiences and increased public recognition of the charity's work
		Promote staff achievements and good practice	4 x Case studies per year per department on their work and its impact	
Higher volunteer engagement and retention.		At least one national award nomination per year	Nominate charity for awards across the third and social care sector	
	7% - The registered fall in people volunteering across the UK	40% increase in volunteer numbers against 2025 baseline in a proactive approach to national decline	Use Volunteer Week, partnerships and campaigns to widen awareness	Annual increases in volunteer hours by 15% against 2025/26 baseline
	£67K –The in-kind contribution 2498 hours of volunteering to the charity in 2025/26	(As above)	Recruit more volunteers across a broader range of services	£100K in-kind contribution by 2028
A more prominent and trusted community presence.	103 – The charity's community partners in 2025/26	Initiate and deliver 2 x new income or service delivery partnerships	Initiate joint purpose vehicles dependent on skills and capacity from partners	50% - Increase in members of the public attending events against 2025 benchmark
	125 - Attendees at charity's National Open Garden Scheme event in 2025	At least 3 x public events/year to raise charity profile	Expand events, open days and public facing activities	
Increased advocacy, referrals and community led engagement.	62 - The number of new referral starts in 2025/6 and 2024/25	10% - Increase new referrals from all sources	Attend, initiate community events and statutory forums	New referral starts increased to 68 by end 2026/27
	8 – Total self – referrals in 2024/5 and 2025/26	50% - Increase in the total self-referrals	Broker and influence new relationships in NHS, local government and community agencies	Improved revenue diversification by 2% against baseline

What we will achieve	What we know now	What we will do	How we will do it	What will be the difference
Reduced operational pressure due to expanded volunteer support	2,498 – The number of dedicated volunteer hours in 2024/25	(As above)	Expand events, open days and public facing activities Promote volunteer stories and contributions	Annual increases in volunteer hours by 15% against 2025/26 baseline

Appendix 1

Endnotes

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Simplified Theory of Change Diagram

Strategic Aim Number	Inputs	Activities	Outputs	Outcomes	Impact
Strategic Aim 1: Build community relationships, networks and operational partnerships that grow referrals, diversify revenues and strengthen market position	- Existing partnerships and contracting relationships - Strong brand presence, digital platforms and evidence of impact - Established trust with service users, families and community allies	- Broker new relationships across local authorities, community organisations and service partners - Negotiate agreements that widen reach, improve revenue and support service development - Participate in networks, forums and cross-sector collaborations - Communicate achievements and impact - Target new areas and markets where unmet need or opportunity exists	- Increased number of community and operational partners - More joint working, collaborative projects and referral pathways - Greater visibility of the charity's work across the region - Access to new service opportunities and investment	- Increased referrals and community engagement - Improved recognition of the charity's value and expertise - Strengthened market position and influence - Increased commercial and community driven revenue	A highly connected, regionally recognised organisation with strong alliances that underpin growth, sustainability and leadership in its field

Simplified Theory of Change Diagram

Strategic Aim Number	Inputs	Activities	Outputs	Outcomes	Impact
Strategic Aim 2: Harness digital, AI and assistive technologies increase opportunities for independence, control and productivity through providing tools for clients and staff	- High staff confidence with digital tools - Strong digital foundations, systems and infrastructure - Commitment to ongoing digital training and innovation	- Expand digital and AI training for staff - Integrate technologies into service delivery, planning and communication. - Pilot and scale new AI applications - Support people using services to adopt assistive technologies - Embed digital systems to reduce costs and increase productivity	- Consistent digital practice across the organisation - Increased use of assistive technologies to support independence - Enhanced operational efficiency through digital automation - New AI supported processes developed and tested	- Digital and AI practice embedded organisation-wide - Increased innovation, efficiency and service quality - Stronger co-design culture supported by accessible technology	A future-ready organisation recognised for digital and technological leadership, supporting greater independence, quality and sustainability
Strategic Aim 3: Ensure professional practice and a commitment to quality that is consistent across all services and operational disciplines	- Dedicated staff and volunteers - Data from surveys, working groups and performance monitoring - Organisational values and existing quality frameworks	- Strengthen supervision, mentoring and staff development frameworks - Expand access to training, peer-learning and reflective practice - Improve internal communication and collaboration - Enhance well-being, flexibility and staff recognition - Align quality standards across all services and teams	- More consistent training and supervision across the organisation - Increased participation in learning and improvement activities - Enhanced well-being, development and communication structures - Clearer and more consistent quality standards	- A cohesive workforce with strong practice culture and shared values - Improved quality assurance and service performance - Enhanced reputation for reliability, professionalism and care	A high quality, values-driven organisation with a skilled, supported workforce delivering consistent excellence across all services

Simplified Theory of Change Diagram

Strategic Aim Number	Inputs	Activities	Outputs	Outcomes	Impact
Strategic Aim 4: Deliver revenue diversification, sustainable investment and cost reduction	- Strong financial management and reserves - Increased private pay demand and diversified revenue streams - Cost reduction successes from digital and organisational restructuring	- Maximise contract values through annual renegotiation - Expand private pay services and community funded activity - Identify and develop new commercial opportunities - Reduce operational and agency costs - Leverage technology to increase efficiency	- Increased revenue from contractual, private and commercial sources - Reduced unnecessary expenditure - New income generating opportunities explored or initiated - Stronger year on year financial performance	- More balanced revenue against costs. - Greater operational capacity for innovation - A diversified and reliable income portfolio - Stronger financial resilience and reduced exposure to external shocks	A financially sustainable organisation capable of investing in innovation, growth and long term excellence
Strategic Aim 5: Increase opportunities for volunteering to build community presence and recognition of the charity’s work	A growing volunteer base and evidence of volunteer impact Community assets, events and service environments suitable for volunteer engagement An expanding digital presence to support outreach and visibility	- Recruit more volunteers across a broader range of services - Develop community alliances to support volunteering and joint activity - Expand events, open days and public facing activities - Promote volunteer stories and contributions - Strengthen volunteer coordination, training and support	Increased volunteer participation and contribution Enhanced community facing activity Greater visibility and awareness of the charity’s impact Expanded public engagement and ally-ship	Higher volunteer engagement and retention A more prominent and trusted community presence Increased advocacy, referrals and community-led engagement	A community-embedded organisation supported by a strong volunteer workforce, recognised for its impact, values and contribution.

Managing Risk

Risk Table Versions	
Date	Version
12/12/2025	Risk Table 1.0
20/05/2026	Risk Table 1.1 Volunteering Development added as a risk to the table



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