



Strategic Delivery Plan – Balance CIO

Current plan covers period - *Quarter 1 2024 – Quarter 2 2025*

Objective 1 - That we build services that are financially sustainable and resilient to changes in local markets

2024 - 2025

Principle 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
Growth and sustainable revenues are diversified across our service portfolio	84% of providers according to latest HFT sector survey indicate government funding initiatives in 2023 had had no material impact on their financial sustainability.	Maintain on-going contractual review to ensure as a minimum, full cost recovery and/or 4% margin as a minimum on bids and existing contracts.	Reduced gaps in contractual investment against cost by further 50% against 23/24 baseline.	End Q2 2024/25
	Current Framework rates for RBK still operate 15% below the charity's costs per hour of delivery.	Initiate at least one x shared lives approaches to reduce gaps in contractual shortfalls and overheads.	Reduced cost pressures from voids and sleep ins by 10% on 2023/24 outturn.	End Q2 2025/26
		Work with RBK and other partners (councillors, MPs) to make the case for higher rates in light of the current situation	1 x grant based service funded and initiated against current baseline.	End Q4 2024/25
Increased core skills across our management teams to manage and grow departmental revenues.	20% increase in LLW since 2023 (10% from May 2024) is likely to further exacerbate shortfalls against contract values for the new financial year. Sales from private revenue grew by 168% in 23/2024 against the baseline of £60K registered in 2022.	As above – explore additional grant-based options for core funding, project-based interventions and partnerships to improve our cost base. Identify and provision business and commercial development training for department heads and operational managers to drive innovation and revenue development.		
	0% of our management team were enrolled on or completed a communications and promotions training in 2023/24. A development gap central to driving brand commercial development.	Commission Media Trust or similar digital training provider to increase skills and confidence of managers to increase promotional output and social media development.	Website pages and digital media updated by 100% of managers and team leads with support from Corporate Services.	End Q4 2024/5
	Website traffic increased by 20% in Q2 and Q3 against that in Q1. Facebook reach increased for period Q1 to Q3 in comparison to the previous year by 237%, visits by 81%. Comparative Instagram reach for same period was up by 180%.	All managers and corporate leads to develop at least one social media campaign in 2024/25 to promote existing or launching new initiatives	At least 1 x digital campaign developed per department by end financial year.	
Automation to leverage productivity gains in administration and finance management is strengthened.				End Q3 2024/25
	Full digitisation has ensured operational productivity gains for efficient reporting, evaluation and support. APIs across our systems present further opportunities for centralising automation in real time data and information management.	Corporate Services to identify options for wider automation of data and information management.	At least 1 x set of metrics agreed to run through Power BI to give real time analytics.	
	DHSC research indicates “45% of providers express concern that care staff lack the necessary skills to adopt digital technologies with confidence.” (Digital Skills Review 2021)	Audit digital competences across the organisations front line staff and address any deficits through training and development, or recruit to close gap against standards included in the ASC Digital Framework .	That at least 90% of all staff have been trained to comply with levels 1 – 5 of the digital skills framework.	End Q1 2025/26
Controls continue to deliver proportionate reductions in central costs against our 2023/4 baseline.	Central costs were reduced by 17% (£58K) on the previous year in 2023. Like for like staffing costs reduced by 20% against 2022 (principally due to vacancies and some cuts to management as well as substantial reductions in agency usage).	Continue to monitor and action operational structures, particularly in new and transferred operations to ensure cost effective return on investment.	Deliver cost saving of 5% against 2023/24 position by end of financial year.	Review end Q4
	Transferred services in Wandsworth delivered a £200K loss for the incumbent provider in 2021/22. Reductions in staffing and operational costs will target a minimum 3% margin against ongoing cost and investment pressures	Complete full financial evaluation of Wandsworth operations to ensure productivity and efficiency savings are delivered in year and shape final contractual package to be agreed in 2025.	Savings identified deliver margin of no less than 4% against the baseline investment inherited in 2024.	Review end Q2, and reforecast Q3 to establish balance position for end of year report

Objective 2 - That our interventions are quality assured and deliver consistency across our operations and development practice

2024 – 2025

Principle 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
Consistent governance and quality standards are fully integrated across all our operational disciplines.	Quality standards award by NCVO cited progress made by the charity in its meeting the level 1 quality standard. But evidenced gaps on our that of level 2.	Review and action all recommendations in NCVO Trusted Charity Standards with board and management team. Particularly in terms of embedding good practice.	Self-assessment against standards shows compliance by charity with core standards for both NCVO and Charity Standards Codes.	??
	The above award recognises our level of compliance with Charity Standards Code 2020 7 key principles. Gaps remain in user leadership, partnership development and communications.	Board and leadership team to evaluate charity’s compliance against the Charity Standards Code and action key areas that fail to fully comply with the 7 key areas of enquiry.	As above.	
	NCVO Charity Quality Standard Level 2 requirement for user involvement and leadership in charity governance not adequately evidenced as part of our evaluation. Recommendation from evaluation is to address this.	Identify options for wider participatory practice in design, decision making and leadership across the charity’s operations and governance.	1 x Audit completed and report generated for review and implementation.	End Q 4 2024/25
		Conduct audit with families and clients on what would represent wider inclusion for them in the charity’s leadership and governance.	As above.	As above
Develop skills, competencies and confidence in our staff and volunteers that drive our quality assurance standards.	95% of (non-Wandsworth) staff completed mandatory training allied to our competency framework in 2023/24. With all managers and team leads completing 100% of designated internal professional development modules.	Schedule in service and online training for all transferring staff in Wandsworth to ensure compliance with our principle competency standards.	100% of staff fully compliant with the charity competency framework.	End Q3 2024/25
		Use PDR process to identify development priorities and training options for staff at all organisational levels.	At least 1 x development priority identified and delivered for all staff in excess of mandatory commitment.	End Q 2 2024/25
	All permanent support staff completed training to NVQ Level 2 care Certificate by Q2 2023/23 No staff completed Level 3 NVQ.	Action delivery of NVQ level three for all non-transferring staff in front line support roles in 24/25 – later for those transferred in.	100% of all support staff in non-Wandsworth services qualified to Level 3.	End Q2 2024/25
			100% Wandsworth Staff qualified to level 3.	End Q2 2025/26
That we renew our approach to recruitment and retention of paid and unpaid staff as an inclusive and collaborative one.	Skills for Care workforce data (2023) indicates more positive outcomes across a range of metrics where values-based recruitment is central to employing staff.	Discuss and option peer based development programme through internal resources and/or through our partners where available.	Good practice programme identified and tested in at least one service.	End Q4 24/25
	Skills for Care (2023) and the TUC Workforce Strategy (2023) both site data emphasising the importance of training and joint decision making in valuing and retaining workforce.	Identify and option best practice development in values based recruitment for all recruiting managers.	100% all managers trained and delivering values-based recruitment.	End Q4 2024/25
		Convene staff (paid and non-paid) conference to identify and address leadership and development from a whole organisation perspective	1 x staff conference delivered.	End Q 1 2025/26
	Turnover rate for staff in the first 3 quarters of 2023/24 was 9.4% against a regional average of 23%.	Review and standardise exit processes to build knowledge base relating to turn over and retention of staff.	100% of leavers undertake and exit interview with managers.	End Q2 2024/25
			Information reviewed for annual Impact report.	End Q2 2025/26
	Balance service managers surveyed indicate a need for training and development in recruitment practice.	Where budget allow, identify and commission training to management and team leads to confident and consistency in recruitment.		End Q4 2024/25
		Review all procedural tools supporting recruitment into the organisation.	100% managers compliant with competency Framework. 1 x suite of cross organisational recruitment tools developed.	End Q4 2024/25

Objective 3 – That the skills, abilities and knowledge of those who work for us or use our services are central to how we design the work around them.

2024 - 2025

Principle 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
Increased confidence, collaboration and partnership across our operational and leadership structures.	TUPE based consultation and discussion has Identified historic gaps in leadership, listening and recognition for those staff and managers transferring in, in our Wandsworth operations.	Alongside mandatory training programme identify additional options for listening, learning and development for staff at all levels at Wandsworth.	100% of staff compliant with competency framework.	End Q4 2024/25
	Discussion and feedback from our management teams indicate a need to increase recognition and value of the work that they do.	Set up working group to design and implement annual staff survey to evidence and challenge our assumptions and support our values	80% staff attend one to one with CEO. 1 x report and recommendations sent to board for discussion and action.	End Q1 2024/25 End Q3 2024/25
	NCVO cites evidence indicating skills gaps 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.	See above for training and development actions	As above.	As Above
That our staff identify the charity as valuing their role in shaping and designing the services we deliver.	Skills for Care data indicates employers with less than 10% turnover citing the following as key to retention:	Option and develop quarterly reward programme for staff and managers showing innovation and collaboration in their work.	Reward programme instituted.	End Q3 2024/25
	<ul style="list-style-type: none"> investing in learning and development (94%) embedding the values of their organisation (92%) celebrating the organisation's and individual achievements (86%) involving colleagues in decision making (81%) 	Nominate staff in and or the charity for regional and national awards to promote staffing excellence and the broader achievements of our work.	1 x nomination for national award identified and actioned.	End Q4 2024/25
Built and promoted partnership with those using our services in leading and shaping our work and governance.	Joseph Rowntree Foundation research (JRF 2023) found best practice in user involvement in charity governance was most effective when grounded in user's objectives and values.	Research and identify options for increased user/carers participation in service design and development of our governance structures.	1 x Audit completed and report generated for review and discussion for Trustee Away Day.	End Q4 2024/25
	88% of those Balance clients indicated that our support last year had been based around their direction on the services that were important to them.	Review our asset-based support and planning tools based on first years use to address gaps and weaknesses in is approach and application.	Tools fully revised and updated.	End Q2 2024/25
Increased resilience through inclusive relationships and operations with a wider range of agencies across the boroughs in which we deliver services.	Pro Bono Economics research in 2023 underlined the challenges across the sector, increasing demand, workforce gaps, falls in volunteering and a consequent struggle to innovate all taking their toll on sector providers.	Identify and develop at least one operational partnership or joint funding bid with another community partner that adds capacity to our existing portfolio of services and interventions.	1 x formal partnership initiated.	End Q4 2024/25
	New operations in Wandsworth, our registration as a framework provider in Richmond and increased contractual relationships with other commissioning authorities in other boroughs present opportunities for wider VCS partnerships to drive brand and joint development.	Managers and staff in our Wandsworth operations to build relationships with and integrate their provision within the LD and wider VCS networks in the borough.	100% of principle networks and partnership boards attended at least 50% of available dates.	End Q2 2025/26
		Managers in Wandsworth to develop increased on line and community profile for our business in the borough.	Minimum of 1 post per week across all digital channels.	End Q4 2024/25
		Deliver a formal launch event for Wandsworth services.	1 x event delivered.	End Q1 2024/25

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

2024 - 2025

Principle 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
Our developmental and charitable objectives beyond 2025 are identified and prioritised.	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.	Charity chair institute monitoring and review of risk and quality standards by board-based committees. Specifically those gaps still to be closed in the charity evaluation.	Self-assessment against standards shows compliance by charity with core standards for both NCVO and Charity Standards Codes.	End Q2 2025/26
	Charity Quality Standards evaluation identifies development priorities still to be fully met in relation to evaluation and monitoring the impact of our services.	Trustees awayday to develop template for wider user involvement in the charity’s governance and oversight	Final recommendation on design actions for implementation agreed	End Q1 2025/26
That we have increased the promotion of our performance, quality and achievements to drive our business development and contractual relationships.	The charity currently participates in provider and community-based forums in two boroughs Kingston and Richmond and is active in Surrey Care Association. However, there continue to be gaps in its networking and relationships across all its operating boroughs.	Identify, diarise and allocate attendance and membership of relevant partnership and networking based options across our operational boroughs to build brand profile and business development opportunities.	As above	As Above
	Upward trends continued across all our social media for the period 1/04/23 – 31/01/24 against the previous year. However, output remains low with an average post of 1 x every 10 days compared to 1 x 12 days for the previous year.	Following training (as above) increase social media output per department to minimum weekly posts per service.	As above	As Above
Increased capacity in targeted charity specialisms to drive participation, investment and skills.	The charity and its staff gave only one public presentation of its services and impact to community or commissioning agencies in 2023/24.	Service leads to identify potential opportunities for wider community engagement to talk about our work and its impact.	A minimum of three public presentations of our work to community stakeholders in any one of operational boroughs.	End Q4 2024/5
	Volunteering in the charity has remained at a low rate of participation – 16 in total for the year, with 12 currently active (this includes trustees)	Recruit a volunteer manager to develop our broader strategy and drive recruitment to increase our base from its current low level	1 x Volunteer Manager recruited.	End Q2 2024/25
	0% of surpluses in the two years since 2022 have been reinvested in staffing to support development in areas including: volunteering, fundraising, advice and guidance and communications.	Identify investment risk options with Trustees to recruit to key positions to diversify our development priorities and strategic development.	At least 2 x recommendations and recruitment priorities identified for delivery by end of plan delivery period.	End Q1 2025/26
		Identify appropriate grant support revenue for targeted recruitment and operational development.	2 x grant bids submitted to support an intervention.	End Q3 2024/5
	The charity spent 1% (£22,000) of its total budget in 2023/24 on staff training. A marginal growth on the previous year but I line with our commitment – circa £500 per head as an average per year. With increased level in our establishment and skills deficits in those staff transferring in – further investment is likely.	Review all training and development priorities for 2024/25 – 26 to align with the charity’s revised business development objectives.	1 x revised competency framework and set of development targets.	End Q3 2024/25
		Complete first round of NVQ level 3 training for spring 2024.	100% of all support staff in non-Wandsworth services qualified to Level 3.	End Q2 24/25
	Pro Bono Economics research (<i>Running hot, burning out</i> 2023) indicates continued growth in demand for specialist support and services from third sector providers despite the impact of increased costs, falling revenues, loss of volunteering across the sector and growing gaps in income for staff.	Set priority standards identified through annual survey, PDR’s and ongoing supervision to staff to deliver a more robust values based support and pastoral care.	1 x evaluation report drafted and discussed by board.	End Q4 2024/25

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