



ANNUAL SOCIAL IMPACT REPORT  
2016 - 2017



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# SOCIAL IMPACT AND FINANCIAL CONFIDENCE SCORES

## BY INVESTING FOR GOOD

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### Thera Trust Charity Bond

This report provides an overview of the social impact and financial performance of Thera Trust and the wider Thera Group (“Thera”) in relation to the charity bond that was issued at the end of April 2015 with Investing for Good’s support.

Ratings are assigned, based on an independent assessment of over 200 impact and financial criteria. Information is also provided on the organisation’s finances, alongside latest developments and impact delivered in the period.

Investing for Good has supported Thera to publish its annual impact report, conducting an independent social impact and financial confidence rating as part of the process. The Social Impact Rating, defined through our proprietary ‘The Good Analyst’ methodology, aims to share our findings with investors and communicate our confidence levels in Thera’s impact processes/ability to capture and improve their impact.

After thorough review of Thera’s impact process and methodology, Investing for Good assigns a financial and impact confidence score.

This is Thera’s second annual report. As with last year, Thera received the highest **Social Impact** score and this year also received the highest rating for **Financial Confidence**. The impact rating is not the focus of this report but its results are included to meet social investors’ requirement for an independent assessment as part of the Bond Programme.

<p><b>Social Impact</b></p> <p>Social Impact is a measure of the investment’s capacity to generate positive social impact. It is based on a weighted assessment of: evidence of mission fulfilment, stakeholder integration, depth of change and breadth of change.</p>	<p><b>Financial Confidence</b></p> <p>Financial Confidence is a measure of financial confidence in the investment and the underlying organisation. It is based on a weighted assessment of: size, structure, development, operational performance, governance and specific risk factors.</p>
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## Social Impact Rating Rationale

As was the case last year, Thera received a score of 1, the highest Social Impact Score. Thera is a particularly impactful organisation, delivering high quality services to people with a learning disability. It is committed to taking into account the views of the people it supports and puts people with a learning disability at the centre of the decision-making process, enabling them to have control over their own lives. What really stood out during our analysis was Thera management’s willingness to learn from their impact results and act upon them.

**Mission Fulfilment:** Thera has an in-depth understanding of its beneficiaries’ needs and can demonstrate how its services meets those needs to achieve long lasting impact. Thera’s outcomes are supported by qualitative feedback and quantitative data where possible.

**Beneficiary Perspective:** Thera engages in systematic consultation processes and knows how to use the information it gathers. Beneficiaries are kept informed of the organisation’s activities, invited to make suggestions and empowered wherever possible to achieve their own personal goals. This is supported by the company-wide Being Heard strategy, the company membership scheme and the leadership structure.

Overall the organisation has good impact data measurement and management systems. These could however be improved and strengthened to ensure consistency of data over time and across services. A more systematic approach to gathering data will help make the reporting system more robust. See appendix for overview of rating methodology.

## Financial Confidence Rating Rationale

Thera has been awarded a score of 1, the maximum Financial Confidence rating. Thera scored particularly highly on the Confidence aspect of the ratings that relates to its competitive edge in the existing market. Thera reports income growth of 11% in the year to March 2017, following income growth of 2% in the previous financial year, and records a sixth consecutive year of revenue surplus. Thera reports that the charity bond covenants continue to be significantly exceeded. Thera has met coupon payments to date and maintained a cash balance of £1.26m as at 31 March 2017.

It continues to be challenging environment for charities providing services to people with a learning disability. Yet Thera has continued to strengthen is financial position and is developing a track record in the social investment market.

Note: Financial figures for 2016/17 are unaudited and may be subject to change



This year Thera received the highest rating in both areas.

# FOREWORD AND EXECUTIVE SUMMARY

## FOREWORD BY JENNY GARRIGAN, DIRECTOR, THERA TRUST

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This has been another exciting year for Thera, seeing us work with more people with a learning disability in their day to day lives, leisure, training and work opportunities as well as providing a range of specialist services such as financial advocacy and circles work with people and their families.

We are always excited by people's achievements, however large or small and our teams remain enthusiastic about the part they play in people's lives. Our learning alongside people with a learning disability, and from our leaders with this lived experience, supports us to continue to innovate - Dolphins' Den has attracted funding for 3 years and Thera (Scotland) has started Gig Buddies!

We are enjoying the challenge of continuing to develop our impact measurement and hope that you find this year's report an interesting and informative read.



# EXECUTIVE SUMMARY

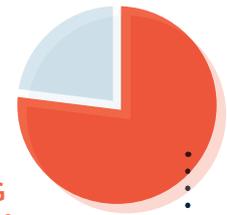


**12** PAID LEADERS WITH A LEARNING DISABILITY

**10**

COMPANIES IMPLEMENTING FULLY INCLUSIVE COMPANY MEMBERSHIP SCHEME

resulting in a positive impact both on Thera and personally for those members with a learning disability.



**77%**



of them said they have gained skills from being a Company Member



**1,128**

PEOPLE SUPPORTED TO LIVE A FULFILLING LIFE<sup>1</sup>

**105**

PEOPLE WITH A LEARNING DISABILITY GAINED PAID EMPLOYMENT

**100%**

sustained their job for at least 6 months



IMPROVED OUR ORGANISATIONAL INSIGHTS INTO SUPPORT TO PEOPLE WITH COMPLEX BEHAVIOURAL NEEDS AND VALIDATED OUR APPROACH AND POLICY



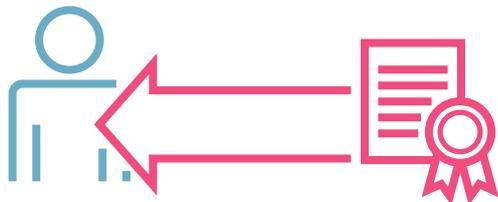
**67**

PEOPLE WITH A LEARNING DISABILITY ARE ENROLLED IN ACCREDITED QUALIFICATIONS



**48**

PEOPLE STARTING VOLUNTARY WORK PLACEMENTS AS A STEP TOWARDS EMPLOYMENT



**31**

STAFF WITH A LEARNING DISABILITY STILL SUCCESSFULLY EMPLOYED IN THE QUALITY COMPANY

1. Supported over 30hrs per week. This result does not apply to The Camden Society, Ansar Projects and Aspire.

**24** PROPERTIES  
MADE  
AVAILABLE  
FOR 50  
TENANTS...

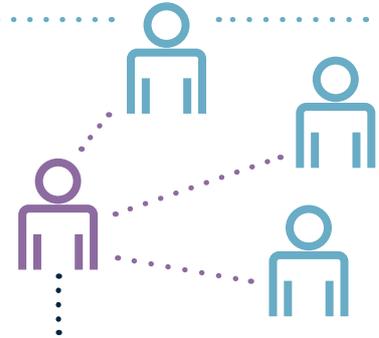


**57%**

OF PEOPLE  
ADVISED BY A  
BROKER FOUND  
SUITABLE  
ACCOMMODATION



DEVELOPED AND OPENED A  
CRAFT SHOP SUPPORTING 10  
PEOPLE WITH A LEARNING  
DISABILITY TO VOLUNTEER  
AND OFFER A SELLING  
SPACE FOR THEMSELVES AND  
LOCAL CRAFTING TALENT



CONTINUED TO BUILD  
THE CAPACITY OF  
OUR COMMUNITIES  
THROUGH THE  
DEVELOPMENT  
OF CIRCLES,  
PEER NETWORKS  
AND PROVIDING  
INFORMATION TO  
FAMILIES OF PEOPLE  
WITH A LEARNING  
DISABILITY



IMPROVED SOCIAL  
INCLUSION THROUGH THE  
LAUNCH OF GIG BUDDIES,  
IN SCOTLAND

This year, in line with our strategy, we have focused on growing our core services to people with a learning disability. We have increased not only our reach, by supporting more people than last year, but also our depth – by improving the quality of our services.

We have continued to learn from our impact results to gain insights into our performance and determine whether we're reaching our goals and having a real impact on people with a learning disability.

# UNDERSTANDING AND MEASURING IMPACT

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For the second year, we are delighted to publish our Annual Report, focusing on our impact and financial performance. Last year, [our first impact report](#) included a detailed description of the majority of our services and programmes. This year, we have focused our reporting on some of our key programmes, which have grown in size and impact since last year. Developing these programmes – namely Individual Direct Support, Housing, Employment, Financial Advocacy and Community Capacity Building has been a central part of our strategy, and we have worked to increase the depth and reach of their impact. It is important that we understand their performance to further improve the delivery and impact of those services.

In this impact report, we try to answer the following questions for each of these programmes, and for our organisation as a whole:

We measure our outcomes against our theory of change, which outlines our pathway to impact. In this theory of change (see page 10), we articulate how, from our programmes and services, we intend to meet our goals and outcomes. We use a mix of qualitative, and quantitative metrics where possible, for outcomes that can be quite easily measured, e.g. how many people with a learning disability gained and sustained employment? We place a lot of importance on qualitative outcomes and people’s satisfaction with the support we provide. Indeed, it is central to our approach and our way of working. We have embedded this in everything we do, our leadership structure and its part in our Being Heard strategy.

We regularly ask people with a learning disability and their circle of support, how they feel about the support they’re getting from us, including measuring the quality of our support by people with a learning disability.

We are dedicated to continuing to improve our approach to measuring impact. We refine our approach and tools every year, based on the results of this reporting exercise. We recognise that we do not always have the exact information and data we’d like to measure and use proxies where possible.

.. WHAT DIFFERENCE DID WE MAKE?

.. CAN WE EVIDENCE THAT WE HAD AN IMPACT AND WHAT DOES THE DATA TELL US?

.. WERE PEOPLE WITH A LEARNING DISABILITY HAPPY WITH THE SERVICES WE PROVIDED THEM WITH?

.. WERE THEY ENABLED TO DESIGN THEIR OWN SUPPORT?

# SOCIAL IMPACT

## ABOUT US

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### Social Mission

Our social mission remains the same: to work closely with and for people with a learning disability to empower them and support them to lead full, productive lives, and support them to have control over their own life. We do this by providing care and support at home and in the community and through a range of specialist services such as Financial Advocacy and Employment and Training support. Our leadership structure embodies this mission by having people with a learning disability directing and controlling Thera Trust and its regional companies.



## WHAT WE DO

## HOW WE DO IT

### INPUT

Thera group provides well trained and experienced care and support, technical, job training and coaching staff.

LEADERS AND STAFF IN THERA GROUP WHO HAVE A LEARNING DISABILITY

PEOPLE WITH A LEARNING DISABILITY CONTROLLING THEIR LOCAL THERA COMPANY

### WHAT WE DO

PROMOTING PEOPLE'S PLACE IN SOCIETY

INDIVIDUAL DIRECT SUPPORT

EMPLOYMENT, TRAINING AND SOCIAL ENTERPRISE PROGRAMME

SUPPORTING ENTREPRENEURS

HOUSING SUPPORT

FINANCIAL ADVOCACY AND CORPORATE APPOINTEESHIP

COMMUNITY CAPACITY BUILDING

### WHAT WE DELIVER

Thera Group has a well supported group of leaders with a learning disability  
People have the opportunity to be self advocates or have advocates to support them

High quality care and support provided through active person centred life plans, care and support plans and health action plans

The Camden Society run accredited employment, training and apprenticeship programmes through their social enterprises and support to college placements.  
People employed and well supported by The Quality Company

People participating in Dolphins' Den and in a range of work skills training including travel and benefits advice

Housing brokerage support received and tenancies achieved

Effective financial advocacy and financial planning for personal money and care budget

Circles of support networks and help parents plan for their children's future

## WHAT WE AIM TO ACHIEVE

There is an increased number of leaders and staff in Thera Group who have a learning disability

There is an increased number of people with a learning disability controlling their local Thera company

People share their views and complaints with the boards

People taking part in named advocacy groups are more confident in speaking up

People feel empowered and self confident

People have more choice and control over their lives

People have improved work or business skills and confidence

People gain and sustain work

People have access to an increased range of in-work training schemes or apprenticeships

People are able to gain employment or set up their own business/ community project

People feel empowered and self-confident

People find somewhere to live; and have and maintain a home of their own, which meets their needs and wishes

People have Increased financial wellbeing

People have increased choice and control over personal money and Care and Support budget

People broaden their social networks beyond their family

Parents have a plan for their children's future beyond their own life

## OUR IMPACT GOAL

Thera will demonstrate that people with a learning disability can be leaders in society

People with a learning disability will have increased personal and social wellbeing  
Quality of support will be checked by people with a learning disability

More people with a learning disability will have increased employment opportunities

People will have increased confidence setting up their own business or community project

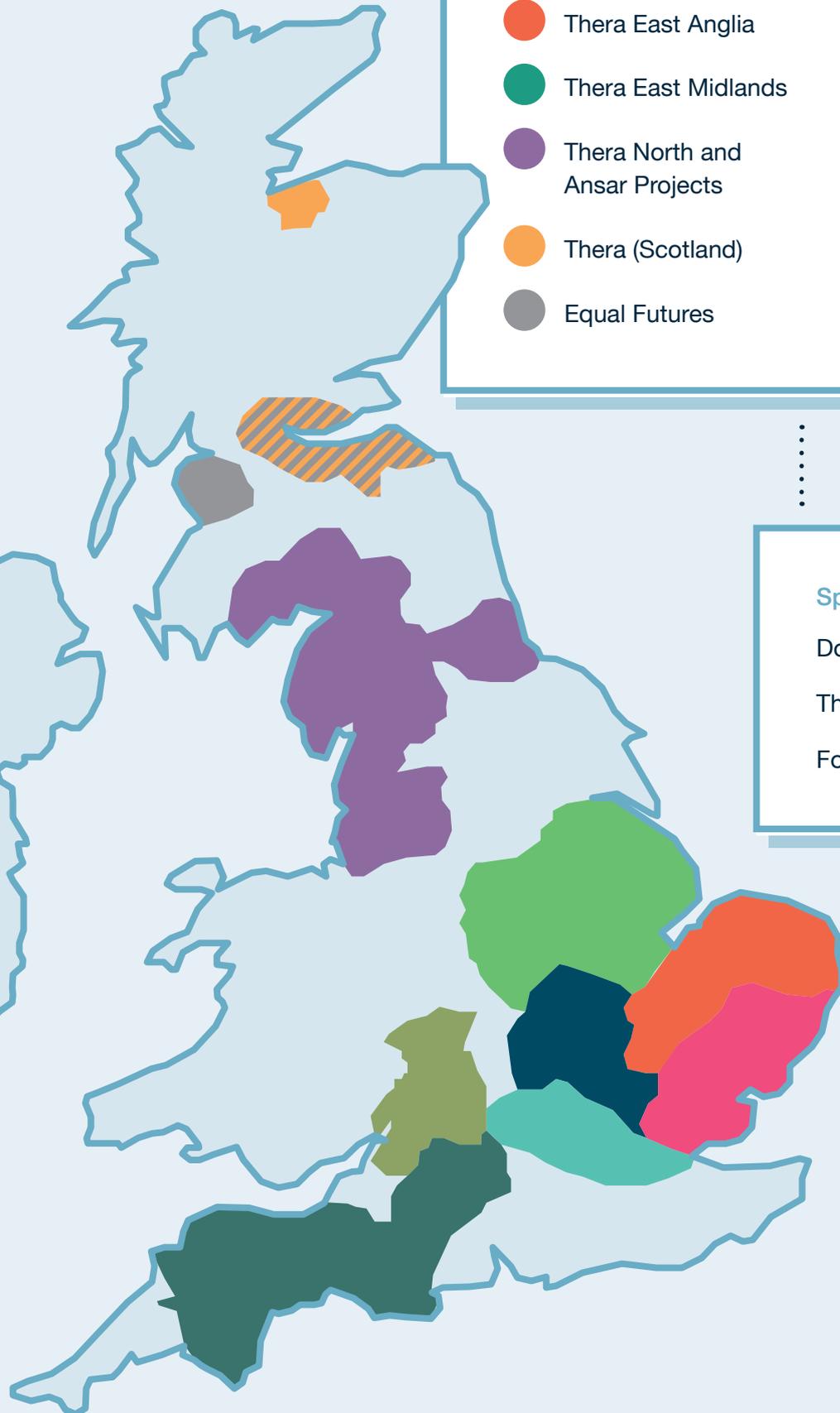
More people with a learning disability with complex housing needs will have access to housing that meets their needs and wishes

People will have choice and control over their own money and choose how to spend it

People will feel supported in their community

Key

- Thera East
- Thera East Anglia
- Thera East Midlands
- Thera North and Ansar Projects
- Thera (Scotland)
- Equal Futures
- Equal Futures & Thera (Scotland)
- Thera South Midlands
- Thera South West
- Aspire
- The Camden Society



⋮

Specialist companies

- Dosh
- The Quality Company
- Forward Housing

## Our approach – Leadership by People with a Learning Disability

The key to our impact lies in the way we do things. As set out in our vision (see box), we want to lead by example to demonstrate that people with a learning disability can be leaders in society. We want to embody the change we would like to see in society. We have therefore built our leadership structure on this principle and employ people with a learning disability as paid directors (or paid in other senior positions) throughout the organisation.

We have employed people with a learning disability in many roles, from the leadership of an equal executive team in Thera Trust, the

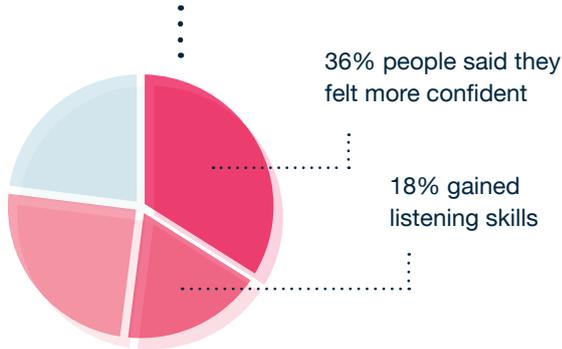
parent company, which includes a shared role of Directors of Quality and Involvement, to Service Quality Directors as part of the Managing Director/Service Quality Director executive team in our care and support companies. Our company rules (Articles of Association) state that there will also be at least one voluntary non-executive director on each of the boards. In addition, through company membership, people with a learning disability have the opportunity to be in control of the company that supports them, by having their vote at Annual General Meetings and by appointing an Independent Director. We have seen a sharp rise in people taking up company membership this year. This is partly a result of our active promotion of the scheme.

	<p><b>LEADERS</b></p> <p>Thera will show that people with a learning disability can be leaders in society</p>		<p><b>RESPECT</b></p> <p>Thera will respect the rights and wishes of people at home, at work and in the community</p>
	<p><b>CONTROL</b></p> <p>Thera will be controlled by people with a learning disability</p>		<p><b>QUALITY</b></p> <p>People with a learning disability will check the quality of support from their Thera company</p>
	<p><b>MANAGE</b></p> <p>People supported by Thera can say how their Thera company is directed and managed</p>		<p><b>CHARITY</b></p> <p>Thera Group will be led by a charity</p>
	<p><b>CHOICE</b></p> <p>People with a learning disability will design the support they want from Thera</p>		

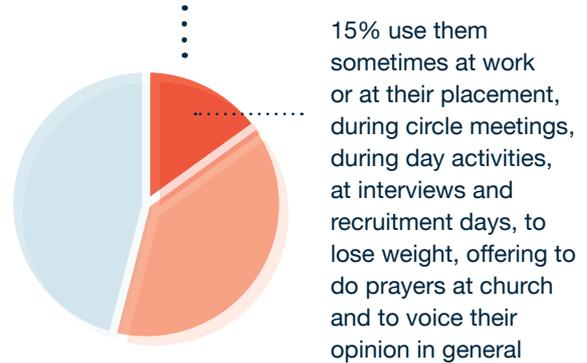
## Our impact on Promoting People's Place in Society

This year, we conducted a survey of supported company members. 39 people out of 59 returned the survey, a 66% completion rate. The main themes of the survey were: being involved or being a part of something such a team; their Thera company and meetings; having a say, having an input and having their voice heard; being included in the support they receive; understanding good support and bad support and sharing information about support. The main findings are:

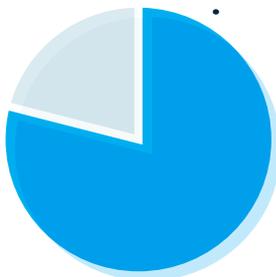
**77%** OF PEOPLE SAID THEY HAVE GAINED SKILLS FROM BEING A COMPANY MEMBERS



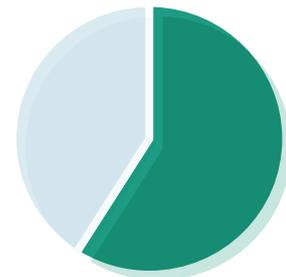
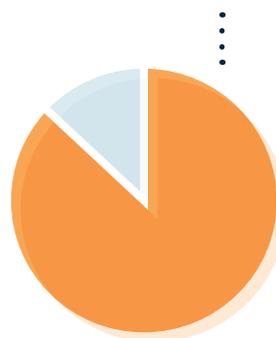
**54%** OF PEOPLE HAVE USED THESE SKILLS IN OTHER AREAS OF THEIR LIFE



**79%** SAID THAT BEING A COMPANY MEMBER MADE THEM FEEL MORE CONFIDENT IN OTHER AREAS OF THEIR LIFE

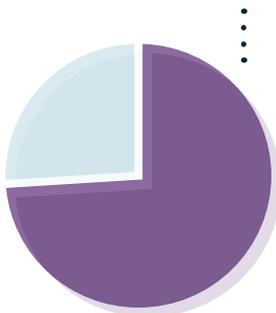


**87%** OF SUPPORTED COMPANY MEMBERS HAVE BEEN TO AN AGM BEFORE

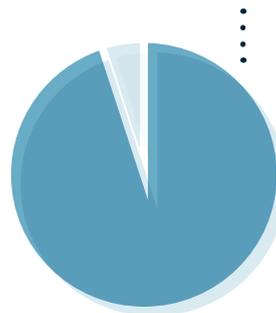


**59%** SAID THAT BEING A COMPANY MEMBER HAS CHANGED THEIR LIFE, SUCH AS MADE THEM FEEL MORE CONFIDENT, MADE THEM FEEL USEFUL AND A PART OF SOMETHING, MEETING PEOPLE AND ATTENDING MEETINGS, SUCH AS REVIEWS, GAVE THEM OTHER IDEAS, SPEAKING UP FOR THEMSELVES, MADE THINGS EASIER AND MADE THEM HAPPY

**74%** SAID THEY HAD MET MEMBERS OF THEIR COMPANY BOARD



**95%** SAID THEY FEEL INVOLVED IN MEETINGS



We will use these results as a baseline to further develop the inclusion of our Company Members with a learning disability.

Our leaders with a learning disability bring their own experience and knowledge of what it means to have a learning disability, the cornerstone of our organisational person centred approach, influencing the strategic direction, policy and practice of Thera. Service Quality Directors (“SQDs”) are paid executive directors with a learning disability. The role of the SQD is to ensure that the quality of support is checked by people with a learning disability, to ensure that people have control over and are involved in the design and delivery of their own support and to implement company membership. As paid Executive Directors, they monitor the quality of support and services to people through visits, commissioning quality assessments and by monitoring and responding to comments and complaints. This SQD role is unique to Thera. Using their lived experience of learning disability, they inform, direct and influence company planning and decision-making to ensure we design and provide the best care and support services possible. Aspire joined Thera last year and they have benefited from having one of Thera’s experienced SQDs join their executive team. Ian Harper has visited everyone supported by Aspire and has quickly engaged with people, enabling people’s views to be represented at board level by a leader with a similar lived experience.



..... **31** STAFF WITH A LEARNING DISABILITY - 1 MORE THAN LAST YEAR.

..... **10**

COMPANIES IMPLEMENTING COMPANY MEMBERSHIP - 3 MORE THAN LAST YEAR.

..... **12**

SERVICE QUALITY DIRECTOR OR OTHER LEADER POSITIONS - 1 LESS THAN LAST YEAR.

**121**

COMPANY MEMBERS - A 55% INCREASE ON LAST YEAR.

“Though my own experience, I can give both staff/managers and the Board a steer on the quality of people’s support and how this affects people. Apart from one other board member, I am the only one who can enforce this.

This role is my first ever paid job and it has given me a sense of purpose in life, a daily routine. I love work and getting involved with meeting people. The paid job also gives me more opportunities to do things I want to do outside of work, for myself, and has increased my confidence. Job satisfaction spills over into my personal life: I am part of a team, I have more confidence. I feel that the role chose me.”

Sam, Service Quality Director, Thera South West

We are committed to supporting our Service Quality Directors to help them grow in their role and realise their own personal and professional potential. Our Service Quality Directors are supported by Executive Assistants – a senior position within the organisation held by someone with the appropriate approach to enablement and a clear understanding of the role of the director. In addition, there is an internal mentoring arrangement with the Directors of Quality and Involvement. Over the past 2 years, each Service Quality Director has carried out self-assessments that form the basis for discussion in mentoring sessions and in performance reviews with the chairman of their company board. We currently have Service Quality Directors of varying times served in their roles, from 18 months to 9 years. The results are personal to each director but all show a willingness to self-reflect and work on areas that require development with an increasing sophistication in how these assessments are used to improve performance.

“Although being supported well by an Executive Assistant actually empowers me to challenge the Board about issues around accessibility and inclusion, having another person with a learning disability at board level is even more empowering. It is always harder to speak out as the only voice. Also our non-executive director, Frances, has worked in the self-advocacy movement and has introduced me to new skills around accessible training and involving experts by experience. This, I feel, has greatly improved the training we give staff around the importance of rights and empowerment.”

Andrew,  
Service Quality Director,  
Thera North

To reinforce our way of working, we have further reviewed and re-launched our **Being Heard Strategy**, to support people have their voices heard in the design and delivery of the support they receive and, to ensure they have the opportunity to be in control of their Thera Company.



# KEY PROGRAMMES

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## INDIVIDUAL DIRECT SUPPORT

Thera supports people with a learning disability to have an ordinary life, maximise their opportunities and support them to reach their own personal goals and ambitions. The activity of day-to-day support is as simple, yet as complex, as getting up in the morning, bathing, choosing what to wear, preparing and eating breakfast, deciding to go out, travelling; and there the day has only just started. Other areas of support may include support with mobility, health, household activities, budget management, developing friendships and relationships, maintaining family relationships, being part of their local community and developing hobbies and activities including work and training.

Thera supports 3,000 people. Of these, there are 1,128 referred to in this document that we have followed for the purposes of measuring our Social Impact. Please refer to footnotes throughout this document for clarity.

## WHAT WAS OUR IMPACT? WERE PEOPLE HAPPY WITH THE SUPPORT WE PROVIDED?

Providing direct care and support to people with a learning disability is the core of Thera's activity and yet it is the most difficult impact to measure.

**The intention is not to measure whether people with a learning disability are achieving their goals and aspirations, but rather whether they are supported and enabled in the right way to recognise and maximise their opportunities to do so.**

This year we have concentrated on reporting the impact of our support to people with complex behavioural support needs<sup>2</sup> as, in

2. Behaviour can be described as challenging when it is of

both the health and social care sectors, it is widely recognised that this is a known group of people at risk of receiving poor support<sup>3</sup>. Many people having recently moved on from more restrictive environments such as NHS in-patient provision and have particular needs in relation to communication, feeling safe and having control at home, building relationships and community inclusion. Using our continued organisational detailed monitoring of the wider population of people with a learning disability<sup>4</sup> Thera supports, and the organisational data previously gathered on defined support needs, we wanted to verify that people with complex behavioural support needs are getting at least the same level and quality of support as our wider population. In addition to operational quality monitoring and audit of support, this has been measured through monitoring outcomes recorded on Iplanit - a web-based person centred planning tool where people enter and track their goals against various categories of outcome. These goals are very personal and unique to each individual. The tool is interactive and enables people to personalise their plans with photographs, video, audio and text, peer quality review by assessors with a learning disability, and anecdotal evidence.

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such an intensity, frequency or duration as to threaten the quality of life and/or the physical safety of the individual or others and is likely to lead to responses that are restrictive, aversive or result in exclusion" Challenging Behaviour: A Unified Approach, Royal College of Psychiatrists, et al, 2007

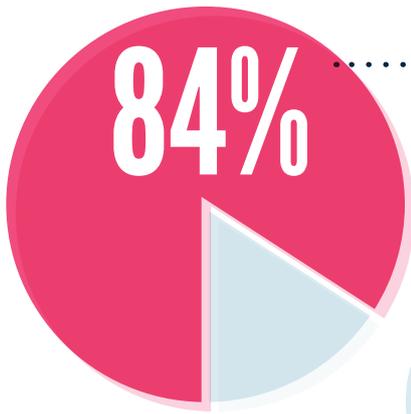
3. Department of Health Winterbourne View Review: Concordat: Programme of Action, 2012

- Winterbourne View – Time for Change, Sir Stephen Bubb, Nov 2014

- Time for Change – The Challenge Ahead, Sir Stephen Bubb, Feb 2016.

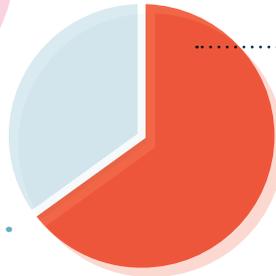
- NHS England Transforming Care for People with Learning Disabilities – Next Steps NHSE et al, Jan 2015

4. This refers to individuals receiving intensive 24 hr support at home-24/7 or >30hrs a week



IS THE OVERALL AVERAGE QUALITY SCORE FOR OUR SUPPORT SERVICES – AS ASSESSED BY EXPERTS WITH A LEARNING DISABILITY

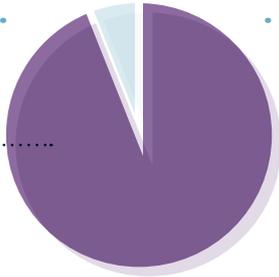
The above score includes measures such as...



OVERALL QUALITY SCORE OF 65%

Against our standard...

‘LEADING YOUR OWN LIFE’



OVERALL QUALITY SCORE OF 94%

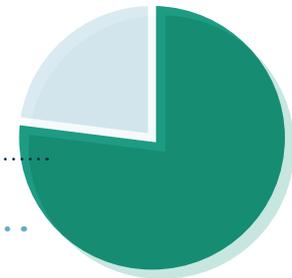
Against our standard...

‘BEING SAFE’

OVERALL QUALITY SCORE OF 77%

Against our standard...

‘DESIGNING YOUR SUPPORT’



OVERALL QUALITY SCORE OF 85%

Against our standard...

‘YOUR COMMUNITY’

1,128

PEOPLE SUPPORTED<sup>5</sup>

This is roughly the same as last year, when we supported 1,102 people

363

PEOPLE SUPPORTED WITH INTENSIVE BEHAVIOURAL SUPPORT

This represents a 36% increase on last year

Measured against 7 Quality standards using 64 indicators. Assessors with a learning disability have assessed the overall quality of support Thera provides to people with complex behavioural support needs as 84.5% met

compared to a rating of 84.2% met for our wider population.<sup>6</sup>

5. Supported over 30hrs per week. This result does not apply to The Camden Society, Ansar Projects and Aspire.

6. The quality indicators were reviewed and increased (from April 2016) to give more depth and breadth to the measurement, given last year’s high scores, which showed some of the standards as “fully met”. We wanted the standards to paint a broader picture of the quality of our service.

## CASE STUDY

D. is a 30 year old man who is admired for many

things, notably, his gentle and affectionate nature, good sense of humour and nearly always having a smile on his face. He likes interacting with people he knows well and to listen and dance to music. There are many things that we know are important to D., one of them being his love of water and sunshine.

D. has a learning disability, autism and Pica tendencies. He requires support in all aspects of his day to day life and interaction with others in addition to support to understand and manage his behaviour.

Prior to being supported by Thera, D. was living in a secure environment due to the complexity of behavioural challenges.

Through putting D. and his family at the centre of his planning, a house was found and adapted to meet his support needs and included a garden 'big enough for a sun house'. There was a planned gradual transition to enable D. to move successfully into his own home with a staff team recruited specifically for him.

D. is supported by a person centred plan and detailed support plans covering the full range of activities, all within a positive behavioural approach. This has enabled D. to try out new activities in his local community and further afield.

As a result of the specialist expertise and consistent approach, D.'s name has recently been removed from the register of people at high risk of being detained in a secure setting.

Anecdotal evidence and testimony, show that, owing to our approach and consistency of working with people, we are supporting people well who are at risk of admission to more restrictive environments. We will continue to work towards an overall improvement in the quality rating under our Leading Your Own Life standard which includes areas such as broadening people's circles of support beyond paid workers and expanding opportunities in leisure, work and developing interests. We have areas of excellent practice to draw on such as the Better Lives pilot. This pilot is about working with 6 people in Cambridgeshire who have a range of aspirations and support needs (not necessarily people with specific needs around complex behaviour) to trial a workbook that supports the person with a learning disability to think about and record their goals and ambitions for work, leisure or hobbies. The work book offers a number of tools to support people to learn about opportunities and

"Last year Matt Bindon from Thera completed the level 4 Professional Certificate in Positive Behaviour Support (with NHS Wales) as part of a pilot project. Matt is an Operational Manager and has been able to create two bespoke services based on learning for people with challenging behaviour. He has trained the Thera staff team and 4 referrals have been diverted to consultancy for Thera to undertake their own assessment and intervention. We have been able to work with Thera on an evidence based model to prevent two psychiatric hospital admissions.."

Zoe Anderson - Clinical Lead Manager IATT West

to plan and record their progress. People and their support staff took part in 3 workshops over 3 months. The lessons learned through the pilot will help us to consider how we best use this approach to enhance the work we do to support people who have additional complex behavioural support needs.

In addition, we have many stories reported under Designing Your Own Support, to show that people are involved in choosing their own staff in a range of ways including setting questions and being on panel interviews, taking part in meet and greet sessions or spending structured time with candidates to get to know how they will get on. We plan to embed the recording of this in our HR system to ensure that we have a true organisational picture of people's control and involvement in this aspect of their support, from which to plan.

At an individual level, people and their teams are supported to recognise, monitor and manage behavioural challenges that arise as a result of a range of factors including the person's disabilities and barriers to communication.

We have been following a sample group of people with complex behavioural support needs over the past 2 years. Through analysis, we have been better able to evidence key influencers on people's behaviour organisationally, reflecting what support staff and people themselves would observe and demonstrate on a day-to-day basis. For example, the number of behavioural incidents is likely to reduce through people's increased participation in meaningful activities, the consistency of staff support teams or the improvement of staff skills in recognising behavioural triggers and positive early intervention. Similarly, a number of behavioural incidents can be attributed to people trying to adapt to change (whether a change in environment, support staff or health). It is also noted that an increase in behavioural incidents can be linked to improvements in staff's recognition and reporting of incidents. There is some evidence to suggest that supporting people with complex behavioural needs in multiple occupancy housing can have a negative impact

“L doesn't use verbal communication but will react to what interviewing staff are saying; for example making a big dramatic gesture and laughing, he may also nod his head. We talk about L's hobbies and what he likes to do and he will take part in the conversation using the above communication. We will monitor the candidates interactions with L and check whether they ask him questions, seem comfortable with his communication style and so on. We ask L if he liked the person which he clearly indicates”

Community Support Leader, Thera East Anglia

on behavioural incidents. This is supported by the fact that incident rates have gone down when numbers of people in houses have reduced for non-related reasons.

We know that people can take more control of their own environment in a single occupancy house and support teams can be more effective in their positive behavioural approach, when there is no third-party influence. However, we would not advocate that people live on their own solely because of their complex behavioural needs unless this is a personal choice or considered view and is supported by an approach that can ensure the person does not become isolated.

Our findings back up our policy and approach on supporting people to live ordinary lives in an ordinary street and supports our continued strive to develop with people their existing support arrangements and ensure that people do not return to living in large households, campus living or blocks of co-located housing that differentiates them from the community around them and becomes a barrier to community inclusion.

## EMPLOYMENT, TRAINING AND SOCIAL ENTERPRISE

Approximately 8 out of 10 of all working age people with a learning disability have a mild or moderate learning disability, but less than 2 in 10 are in employment.<sup>7</sup> Only 6 in 100 of those with a more severe learning disability (who are known to social services) are in work in comparison to 49% of the wider disability community.

People with a learning disability find it very hard to find, but also sustain, employment. This is due to many factors. Among others, a lack of confidence is a major factor, as is a lack of understanding of the job options available. The challenges of searching and applying for jobs and the anxiety caused by changes in circumstances also affects and puts many people off. In addition, many employers lack the understanding of what people with a learning disability can do with the right support.

Yet, having a job is for many people with a learning disability, as well as for most people, key to feeling independent and to provide them with aspiration and purpose.

### The Camden Society

It is through The Camden Society that we run most of our employment services. We support people with a learning disability into employment through training programmes (including apprenticeships and accredited qualifications); employability support, focusing on job search and CV development; Employment Programmes – linking young people’s employment support to college courses; direct employment support to those in employment, support for Access to Work applications and Welfare Benefits advice. We also engage with employers to communicate our work and promote the employment of people with a learning disability.

7. <https://www.mencap.org.uk/about-us/what-we-think/employment-what-we-think>

	2015-16	2016-17
Number of people completing employability training	18	38
Number of people with a learning disability who have completed fixed term work placements	61	78
People supported into paid work	90	105
Sustaining their jobs for over 6 months	50%	100%
Number of people enrolled in accredited qualifications	43	67
Number of people completed their qualification	43	49 <sup>8</sup>
Number of people starting voluntary work placements as a step towards employment	51	48



2016-17 has seen 105 people securing employment through The Camden Society's supported employment services, this is an increase on the previous year. We have also observed a significant increase in the percentage of people sustaining their employment for over six months. It is too early to know how long this year's people will sustain their employment for. Of last year's cohort and the 105 people we've placed in employment so far, 79 sustained their employment for 26 weeks or more, and 86 sustained their employment for 52 weeks or more and is due to a number of factors including;

- We have continued our programmes and have focused on building networks and worked with candidates regularly over a period of a year to build confidence, skills and job search techniques.
- We have increased our job brokerage service through our employer engagement officers, linking in with some major employers such as Gather and Gather, Harrison's Catering, and The Royal Opera House to promote the business case of hiring people with learning disabilities, offering work trials taster sessions as part of the recruitment to ensure people can demonstrate their skills

- We have also strengthened our partnership work with Job Centre Plus and mainstream brokerage services such as Greenwich Local Labour and Business and Lambeth Working

Employment outcomes are measured through each contract and we ensure that they are validated by a job offer and contract. We provide a high level of support to the employee and employer at the induction period to ensure success and this can be seen by the sustainment rates which are higher than mainstream provision.

Our job outcomes increased in the 2nd and 3rd quarter of the year, as this coincides with the time that students finish their education programme: we are supporting people with work services where they are attending a further education college and leave college over that period to find work.

The apprentices that graduated are now all in external open employment in a variety of roles including Dulwich Picturehouse, Harrison's, Cater plus, Marks and Spencer. This is a 100% outcome success rate.

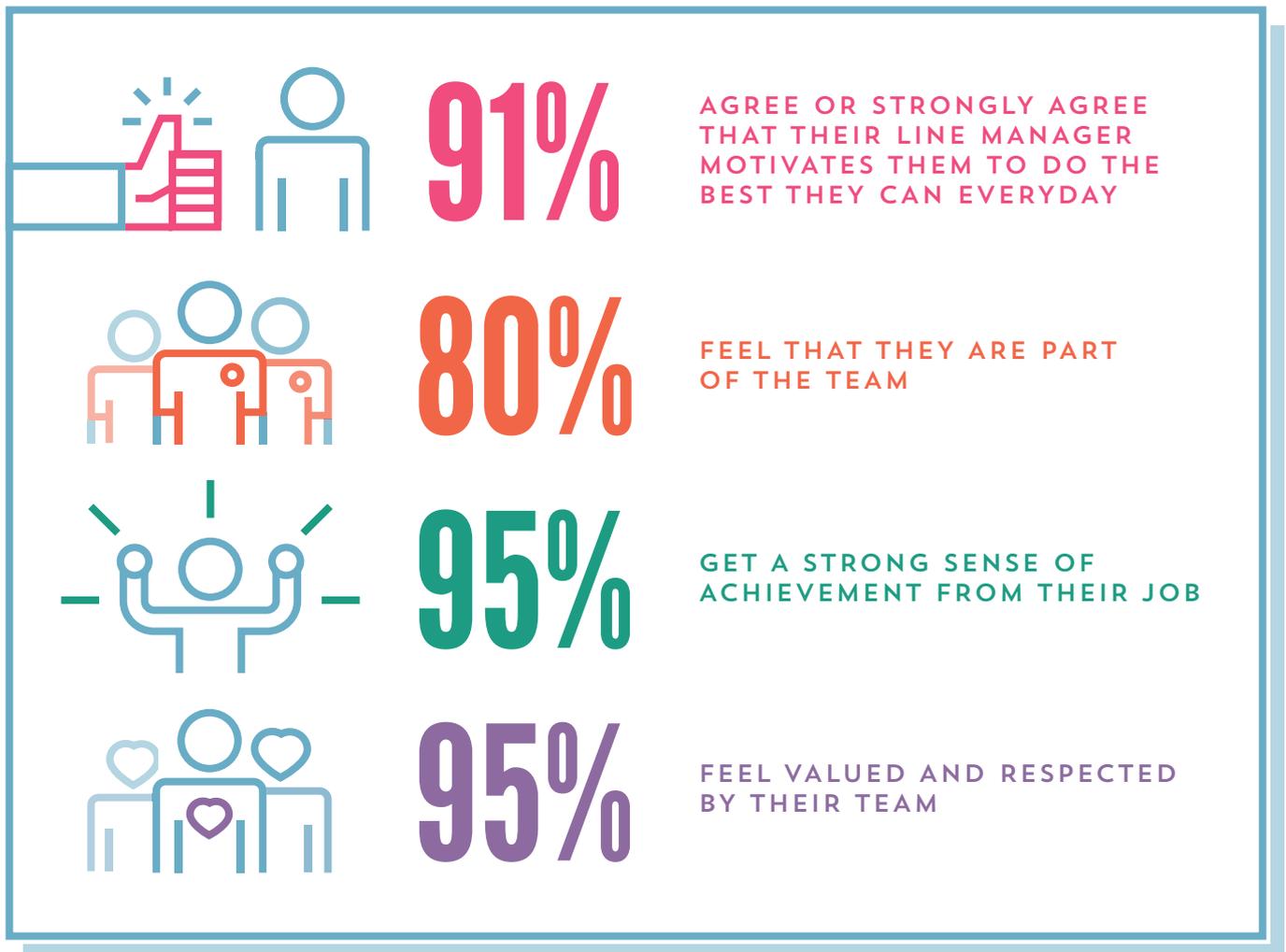


## The Quality Company

The Quality Company is a unique company which employs people with a lived experience of learning disability to assess the support we provide to people with a learning disability. This complements the quantitative information that our companies use to monitor quality and compliance. The Quality

Company forms a part of our approach in demonstrating that people with a learning disability can be leaders in our society, people designing their own support and quality being checked by people with a learning disability. Through its work, The Quality Company achieves a range of employment outcomes. This year, the quality company employed 52 people, 31 of whom have a learning disability.

A staff survey<sup>9</sup> of the Quality Company showed that:



.....

9. 52 were invited to participate and the rate of return was 24 responses

## 82 Crafts and Creations

82 Crafts and Creations is a new shop that people with a learning disability opened, which sells handmade products and offers people with a learning disability the chance to gain retail skills. The shop is located in Whittlesey, Cambridgeshire. Club 82, a group of people with a learning disability supported by a Thera team, has been running for several years, but recently decided to open the shop, to train and show people how to work in a retail environment, for people to build links and integrate with the local community through the shop, to give people we support the experience of setting up and running a business, and to support people with a learning disability to be leaders and make decisions regarding the running of the shop.

So far people have made huge progress towards setting up the shop. They met with over 14 potential suppliers to explain and sell the idea of 82 Craft and Creations and decided what items to produce for sale. They decided what sort of items to stock from other suppliers, helped decorate the shop and refurbish the building. Since opening in December 2016, ten people have been volunteering in the shop, which is open six days a week. People have also been evidencing the skills they have acquired whilst working in the shop. You can watch our video at <https://vimeo.com/214141343>.

Now that the shop is open for business, we will be focusing on improving the training and development that people receive through their voluntary work there.

In addition to the formal employment and training programmes people have been enabled to access work opportunities through their day-to day support. Will's story provides a good example of how this can take place.

## CASE STUDY

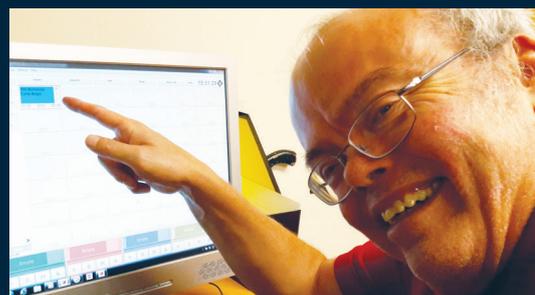
Will has been supported

to go to Chelmsford Community Radio Station (CCR) every Saturday for about a year by his personal assistant, Carl. Will loved it the first time he went and the team at the radio station got along with him really well – not surprising, as Will loves to socialise and has a great personality.

Carl introduced him to some of the administrative work that the team does, including how to prepare a show and edit the music ready for airplay. After a while they recorded a couple of shows together. During this time Will got to know the Saturday crew, the station founders and a few other faces. It wasn't long before he was invited to go live on air on the rock show with Angela.

At first Carl was with him for support, then he realised he was not needed and Will started going on his own. This led to Will being offered his own live show every other Saturday from 11am to 12pm.

Besides the usual radio work, Will has mucked in with other jobs that needed to be done. Everyone is a volunteer at CCR so any work that needs doing they have to do themselves. Will is a much-loved part of the team.



## Dolphins' Den – Supporting Entrepreneurs

Dolphins' Den aims to empower people to achieve their dreams by encouraging people with a learning disability to believe in themselves and to set up their own business or community project.

Dolphins' Den begins with a series of workshops which aim to support people to think about their ideas for a business or community project. After completing the workshops, participants can sign up to receive one-to-one mentoring from a local business person. The role of a mentor is to support the participants to make their idea a reality.

We had paused this year, putting in a bid for funding to sustain the project for 3 years. We have secured funding from the European Social Fund and the Big Lottery<sup>10</sup> to run 6 Dolphins' Den projects (2 per year) in Swindon and Chippenham between 2016 and 2019.

Our workshops cover topics such as market research, selling, business planning, marketing and budgeting/financial planning. In May-June 2017, participants were matched with a mentor for a period of 6 months and receive one-to-one mentoring. The workshops started again in January 2017.



10. The Dolphins' Den project in Swindon and Chippenham is part of the Building Bridges partnership of organisations, led by Community First, that has come together to deliver the Building Better Opportunities Programme across Swindon and Wiltshire. The project has received up to £3.9m of funding from the European Structural and Investment Funds Growth Programme in England. The Department for Work and Pensions is the Managing Authority for the England European Social Fund programme. Established by the European Union, the European Social Fund helps local areas stimulate their economic development by investing in projects which will support skills development, employment and job creation, social inclusion and local community regeneration. For more information visit: <https://www.gov.uk/european-growth-funding>.

## Dolphins' Den in numbers

27 PEOPLE HAVE COME TO AT LEAST 1 WORKSHOP

NUMBER OF PARTICIPANTS WE ARE EXPLORING A ONE-TO-ONE SESSION WITH: 3

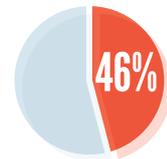
SUPPORTERS SAID THAT THE WORKSHOPS WERE AT THE RIGHT LEVEL AND DESCRIBED THEM AS INSPIRING, FRIENDLY AND HELPFUL



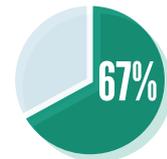
PEOPLE SAID THEY GAINED WORK SKILLS



PEOPLE SAID THEY DEVELOPED FRIENDSHIPS THROUGH DOLPHINS' DEN



PEOPLE SAID THEY GAINED BUSINESS KNOWLEDGE



PEOPLE SAID THEY LEARNED ABOUT SETTING COMMUNITY PROJECTS



Cumulative results since the inception of Dolphins' Den

## CASE STUDY

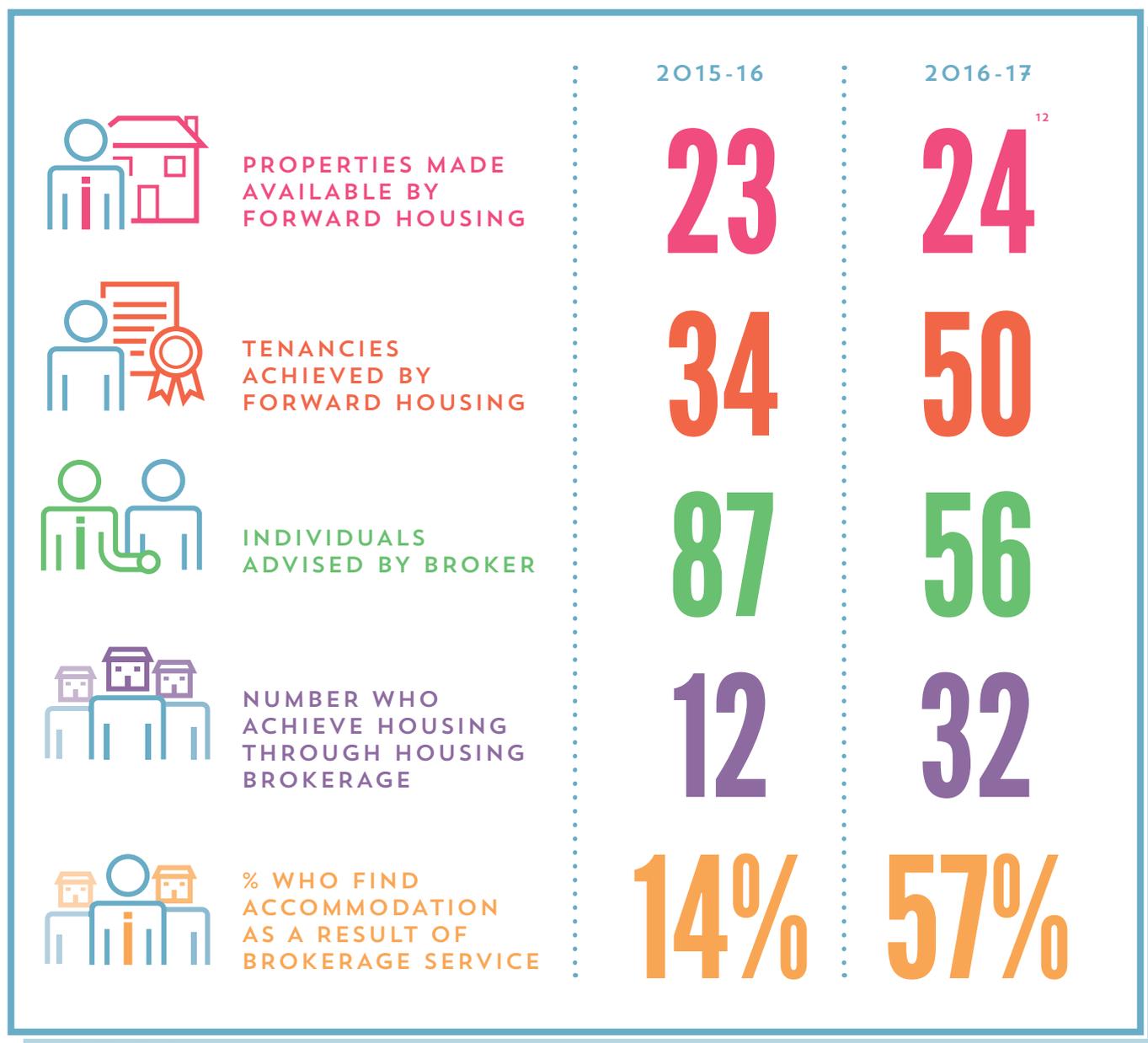
A mother to a young autistic man with severe social anxiety referred her son to us. We visited him to talk about joining Dolphins' Den, but he wouldn't leave his room. Andrew from Thera, who has a learning disability, talked to him and they discussed their mutual passion: IT and computers. Although we had hoped that he would come to our introductory workshop a few weeks later, we couldn't be sure.

The gentleman has attended all workshops to date despite his continued anxiety. He is too anxious to present his ideas to the group but he is able to work through the exercises with his support worker and talks to each of us about his idea on a one-to-one basis. He is planning on setting up a computer repair business. He is enjoying himself so much, that he has invited one of his friends to join him in coming to the workshops and to set up his business!

## HOUSING

The majority of people with a learning disability want to live independently, and the vast majority of parents whose adult child lives with them want to see greater independence for them. Independent living is ‘about disabled people having the same level of choice, control and freedom in their daily lives as any other person<sup>11</sup>’. This is what we focus on delivering at Thera through our charitable company Forward Housing. We support people to have choice and control over the support and/or equipment they need to go about their daily life.

Thera’s activities in this area focus both on housing brokerage (helping someone find somewhere to live) and on purchasing or leasing, and adapting or improving property. The goal of this service is to find suitable property for people. We respond to requests to source and purchase or lease housing, provide advice and guidance on the adaptation of property, and manage property improvements and adaptations.



11. UK Office for Disability Issues, Independent Living Strategy. Available at: [http://odi.dwp.gov.uk/odi\\_projects](http://odi.dwp.gov.uk/odi_projects)

12. Includes one property purchased for short breaks services.

Whilst there has been a drop in the number who have been advised by a housing broker compared to last year, there has been continued success in supporting people to move into housing of their choice. As reported last year, this is due to access to new sources of capital. In July, 2015, Thera and Forward Housing reached an agreement with Cheyne Capital's Social Impact Property Fund, whereby Cheyne would make available up to £15m for the purchase and adaptation of property to be leased from the Fund by Forward Housing for identified people with a learning disability. Forward Housing makes this

property available through leases to Empower Housing Association. This year, through this route, we have facilitated 23 new houses that provide accommodation for 50 tenants, as well as an additional property for short breaks services. In addition, with the use of our own social investment capital, one existing property was brought back into use as a supported housing scheme to provide accommodation for 4 people and Thera purchased a residential care business, which, as a result of de-registration, enabled 9 people to take up tenancies of their own for the first time.

## CASE STUDY

Andrew and Tim have lived in a village in Norfolk

all of their lives and grew up together. They are best friends and decided that it was time they left home and started leading their own lives.

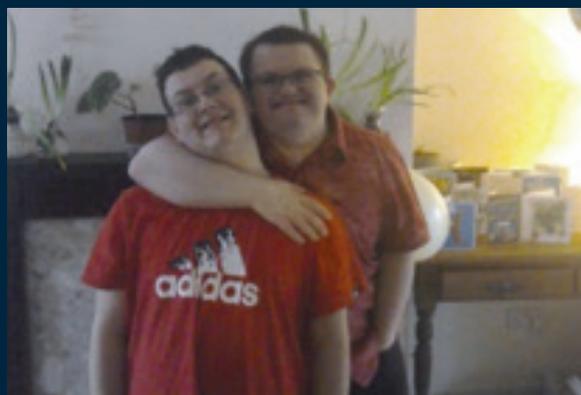
Unfortunately, the local housing association was unable to find somewhere suitable for them to rent in the village where they wanted to live, so Thera was asked to help. Within weeks, we had identified a good house in the village which was owned and rented by a local landlady. She was delighted to offer the property to two local lads who were looking for somewhere to live.

Andrew and Tim were directly involved in recruiting the people they wanted to support them. They worked closely with us to identify what type of skills and attitudes they wanted to see in their staff team. They also had support to sort out the practical side of moving – such as getting furniture and organising utilities. Andrew and Tim decided that they wanted Dosh to help them with their finances and this is working really well.

Tim and his dad have built a greenhouse in the back garden and the gentlemen are now growing their own vegetables. They are both learning to cook and have had their families over for dinner several times.

After meeting David Parker (Service Quality Director), Andrew is planning to become a Company Member and wants to become a Quality Assessor.

When asked recently if there was anything they could change, Andrew's only wish was that Tim could be his brother as he loves living with him so much.



When looking for properties, we carry out an initial search based on the brief we have been given, viewing properties and commissioning surveys to ensure that properties have no structural issues that might make them unsuitable, have the capacity to accommodate any aids or adaptations that are needed and are financially viable. Thereafter, we invite people and/or families to view properties and select the one that they feel best meets each individual's needs. Our approach ensures that people benefit from the security of an Assured Tenancy, which effectively gives them a home for life.

Sometimes, an approach does not lead to us helping people to move home for a range of reasons including people and/or their families making early enquiries for future planning, people needing to move in an emergency that means they are "placed" in a vacancy, often a residential care setting, or changes in commissioning practice.

## FINANCIAL ADVOCACY

Many people with a learning disability have little control over their own resources. Few living in supported environments have ever controlled a budget for their expenses. Some may take on credit they don't always understand or can't afford. Whilst there are financial support services, these are often not accessible to people with a learning disability. Therefore, few have opportunities to improve their financial knowledge or gain control over their own finances.

Dosh supports people with a learning disability to have more independence and control over their money. Last year, Dosh supported **512 people**. This year, Dosh supported **689 people** with appointeeship and financial advocacy, which includes support with benefits, bills and budgeting. We believe that everyone should have personalised support to use their money in the way they want and for the things they enjoy.

We have continued to develop new tools to help people to learn new skills and make choices with their money. We also share this with others at training sessions and workshops.

We asked people we support what was important to them and used what they said to write the **Dosh Promise**. We use it to make sure we are supporting people in the way they want. We aim to support each person in a person-centred way, supporting people to meet their goals, for example:

- I will be able to use my money to do the things I want
- I will spend my money in the way that I want
- I will have my own financial advocate who visits me, knows what I like and listens to what I want
- Dosh will help me to keep my money safe

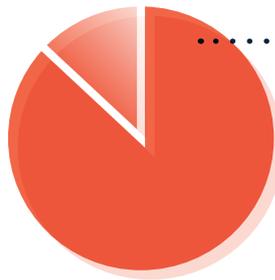
(See [www.dosh.org/dosh-promise](http://www.dosh.org/dosh-promise) for more information).



We use this to measure our impact and success through our Annual Review process. Our latest Annual Review results showed:<sup>13</sup>



..... **97%<sup>13</sup>** OF PEOPLE SUPPORTED AND THEIR CIRCLES OF SUPPORT ARE HAPPY WITH THE SUPPORT WE PROVIDE



..... WE ARE MEETING THE DOSH PROMISE STANDARDS WELL - RANGING FROM **87% - 100%** SATISFACTION

Here is a sample of our Dosh Promise results. Full results can be found at <http://dosh.org/annual-review-2016-results>

	PEOPLE SUPPORTED	CIRCLE OF SUPPORT
 <p>I SPEND MY MONEY IN A WAY THAT I WANT</p>	 <p>100%</p>	 <p>98%</p>
 <p>I CAN BE AS INVOLVED AS I WANT IN MY MONEY</p>	 <p>98%</p>	 <p>98%</p>
 <p>I WILL GET THE INFORMATION ABOUT MY MONEY IN A WAY I CAN UNDERSTAND</p>	 <p>96%</p>	 <p>87%</p>
 <p>DOSH WILL HELP ME KEEP MY MONEY SAFE</p>	 <p>100%</p>	 <p>99%</p>

PARTICULAR STRENGTHS IDENTIFIED INCLUDED **BEING SUPPORTIVE**, **INVOLVING PEOPLE WE SUPPORT** AND **KEEPING PEOPLE'S MONEY SAFE**.

13. 50% response rate

This is in line with last year's results. Based on this year's feedback, we have already improved our payment times and will help the people we support to buy bigger things more quickly.

Full results can be found at:

<http://dosh.org/annual-review-2016-results>

Our support means that people have access to their money, with one-to-one support from their own advocate, to spend on the things they enjoy. We have supported people to achieve their goals, whether that's to save money for their first holiday abroad, learn to budget, or start a new activity.

As appointees, we also support people to claim the right benefits. We are supporting many people to transfer from Disability Living Allowance (DLA) to Personal Independence Payment (PIP), increasing people's income by £2,604 on average.

"I believe that the support provided by Dosh reduces the risks of my client being financially exploited and also ensures that they are in receipt of their full benefit entitlement, whilst ensuring their savings are not detrimental to their benefits entitlement."

Social Worker

This year, we processed 180 benefits applications or reviews. We helped 77 people increase their annual income through moving to the right benefit plan, which is 53 more people than last year. The increase in numbers is due to increased referrals in most parts of the country, generally based on word-of-mouth, incremental referrals. 58 stayed on maximum benefit, and 44 applications are still awaiting an outcome.

2015-16 .....

**£2,388**

AVERAGE ANNUAL INCREASE IN PEOPLE'S INCOME

2016-17 .....

**£2,604**

AVERAGE ANNUAL INCREASE IN PEOPLE'S INCOME

## JULIE'S STORY

Before Julie was being supported by Dosh, she was being financially abused by somebody who was taking her money and she was overdrawn and she couldn't afford to do any activities or buy things for herself.

Dosh supported her to get the right benefits, after time receiving the wrong amount. Julie has now received a back payment of over £6,500 for benefit money which she should have been getting previously and she gets more than £60 extra each week!

The person who was taking Julie's money does not have access to her money anymore. Dosh has a managed account for her money and we can pay Julie's bills to make sure she is not late with any payments again. Her Advocate supports her to write a budget so she knows how much money she has left after her bills. She chooses how much of this she wants to spend each week and how much she wants to save in her Dosh account. This means she has access to the money she needs, can do the things she enjoys and cannot be pressured into giving away all her money.

## JOHN'S STORY

John visited a mobile phone provider which gave him a new 'free' tablet. Although the tablet was advertised as being free, this was misleading and it signed James up to a 24 months contract. After speaking to his Dosh Financial Advocate, he realised that he was not able to afford the contract.

Cancelling the contract with the phone provider cost James the full amount of the contract in cancellation fees, which was then passed on to a debt collection firm, to whom John started making monthly payments.

John hadn't been provided all the information in an accessible way and didn't understand what he was signing. With his financial advocate's support, they sent evidence to the phone provider that the contract was not valid. The company then stopped all payments. This is a weight off John's mind, who can now do other things he enjoys instead of paying for something he doesn't want.

# COMMUNITY CAPACITY BUILDING

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## Equal Futures

Equal Futures continues to support and develop enduring circles of support with families to ensure that their relatives with a learning disability have enduring informal support around them.

## TEN Partnership

The TEN partnership includes Thera (Scotland) as the formal Care and Support partner, Equal Futures who help individuals expand their personal circle of support and Neighbourhood Networks, who work within the local community to bring together a local network of people who come together to informally support each other. We currently have 2 networks made up of 21 people. This is a good place to start to help people connect with people in their community and promote friendships and natural informal unpaid support.

## Safe and Secure

We continue to promote our Safe and Secure (England) publication, a guide and toolkit which was published and first distributed in October 2015<sup>14</sup>. 1,480 books have been distributed this year and a further 48 more people attended Safe and Secure workshops with the aim of increasing awareness of the book to give parents of people with a learning disability the advice and tools they need to ensure their children have a safe and secure future when they are no longer around.

## Gig Buddies (Scotland)

In August 2016 and in partnership with Stay Up Late in Scotland, we launched Gig Buddies, a project to link music fans who have a learning disability with other music lovers for gig nights, or whatever other activities they enjoy doing together. Our vision is for people with a learning disability to know they can Stay Up Late and choose how they live their lives. We aim to create a community of people who share the same interests, regardless of their disabilities and differences.

This project aims to:

- Create a group of ‘sound people’ in Scotland who are talking about and tackling many of the issues faced by people with a learning disability
- Start a conversation with local venues around accessibility with a view to creating a more accessible live music scene in Edinburgh
- Develop and host a programme of ‘real gigs in real venues’ that showcase the work of people with additional support needs in a public forum

We aim to become a platform where people with a learning disability can raise issues they face around accessing live entertainment with venues, promoters, the public and beyond.

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14. The book was written by Al Etmanski with Jack Collins and Vickie Cammack, PLAN, and with contribution to the English edition by Denis Rowley, Project Manager for Thera Trust.

Our main impact goals are to **reduce social isolation** for people with additional support needs and to **empower people to have the social life they choose**. Because this is still a new project, we do not yet have impact data to measure the impact we've had so far. However, the feedback we've received so far is extremely encouraging and the group will continue to decide how they want to run it and what events they would like to run and attend.

Our social events are constantly growing and gaining popularity from both members and their families/support teams. Gig Buddies members have made a point of our socials being public events not organised by the project, which we

“I signed up to Gig Buddies to do different things and keep me interested. Having someone to take you out once a month keeps you in good company, it's someone to talk to and keep in contact with. It's good to have one on one time with someone because you can talk more and you get to know the person well.

Gig Buddies is a good idea because it's a project that keeps you involved. If someone is struggling to go out on their own it gets you out of the house and keeps you out and about.

I think Gig Buddies events are a great place to meet other people and see what the project is about. I'd tell people to get involved and see how it goes, you can always come along to the socials to see if you like it. It's a great project to be a part of.”

Craig

“People need close relationships. Friendships and relationships lift people up, it makes them happy and bubbly. I think it's important to help people; being able to give them relationships is a wonderful opportunity. Gig Buddies is allowing me to make friends and do things I wouldn't normally do. Sitting at home can be boring, Gig Buddies lets you get out and have adventures! I wanted to get out to the theatre and Gig Buddies allows me go out in the evenings. It's wonderful to talk to my Gig Buddy, he is a hero.”

Marsaili

attend as a group. This means that our members are getting the opportunity to attend public social events while having the comfort that they are there with a trusted group of people. One member we support recently said 'I've seen people at different Gig Buddies events and we're now becoming a group of friends'.

Gig Buddies is featured on the accessibility page of the Edinburgh Fringe Festival's website and we are working with them to help make the festival more accessible. Some events that we've attended in Edinburgh include an Open Jazz afternoon at The Jazz Bar, The Hypnotic Brass Ensemble at The Voodoo Rooms, National Theatre Live screening of The Merchant of Venice, Sister Act The Musical at the Playhouse Theatre and many more.

## SUMMARY SCORECARD

Note, some of last year's data was revised. These are the metrics we will now report against.

Promoting People's Place in Society	2015-16	2016-17
# of staff employed who have a learning disability	30	31
# of Service Quality Director and other leader posts created	13	12
# of Volunteer Directors with a learning disability <sup>15</sup>	N/A	5
# of people with a learning disability who are supported company members	67 (note this is a revised figure. Previously stated 60)	121
# of companies implementing company membership	7	10

Individual Direct Support	2015-16	2016-17
# of people supported	1,102	1,128
# of people per month received intensive 24 hour care and support	585	609
# of individuals contracted to have intensive behavioural support	267	363
Average % quality score for support delivered, as assessed by The Quality Company <sup>16</sup>	96.5%	84%

15. This figure wasn't recorded in 15/16.

16. The evaluation criteria have been revised to be more robust

Employment	2015-16	2016-17
# individuals completed employability training	18	38
# of people with a learning disability have completed fixed term work placements	61	78
# of people supported into paid work	90	105
% of people sustaining their jobs for over 6 months	50%	100%
# of people who started voluntary work as a step towards employment	51	48
# of people enrolled in accredited qualification training	43	67
# of people completing the qualification <sup>17</sup>	43	49
# of employers who are currently actively engaged with Thera's service	63	83

Dolphins' Den – Supporting Entrepreneurs	2015-16	2016-17
# of individuals participated in Dolphins' Den <sup>18</sup>	90	27
# of individuals running their own enterprises or community groups as a result of Dolphins' Den <sup>19</sup>	3	TBD
% of participants who said they gained work skills	69%	79%
% of participants who said they developed friendships through Dolphins' Den	46%	46%
% of participants who said they gained business knowledge	52%	67%
% of participants who said they learned about setting up community projects	32%	58%

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17. Those that haven't completed are still working towards their qualification. There is a small portion of them who have dropped out.

18. The programme began in January 2017, more participants to join later in the year

19. The programme began in January 2017, more participants to join later in the year

Housing	2015-16	2016-17
# of individuals advised by the Housing Broker	87	56
# of people receiving housing brokerage support that achieved housing	12	32
% of those receiving housing brokerage support who achieve housing	14%	57%
# of properties made available by Forward Housing	23	24
# of tenancies achieved through Forward Housing's input	34	50

Financial Advocacy – Increased financial well-being	2015-16	2016-17
People supported to move from Disability Living Allowance (DLA) to Personal Independence Payment (PIP) - staying on the maximum award or increased their income.	28	135
# of welfare benefits assessments	452	619
Average £ saved or earned as a result of those assessments per year	£2,388	£2,604
# people receiving support from DOSH	512	689
% of people supported who agree that we are meeting the Dosh Promise	100%	97%
% of people's circle of support who agree that we are meeting the Dosh Promise	97%	97%
# of individuals who have a Financial Advocate	452	619
# of Financial Advocate Hours Supplied	1,088	1,564

Community Capacity Building	2015-16	2016-17
# of Safe and Secure books distributed	654	1,480

# FINANCIAL INFORMATION

Note: All financial figures provided for 2016/2017 are unaudited and drafted on the basis of UK GAAP. They may therefore be subject to change. Prior figures have been restated to take account of the introduction of FRS102 and reflect final audited accounts.

## INVESTMENT DETAIL

Asset type	Bond
Coupon	3.5% fixed p.a.
Status	Senior, unsubordinated
Term	3 years
Issue date	28 April 2015
ISIN	XS1217934828
Primary Impact Area	Care of disabled and older people, wellbeing and social change
Investment size	£1,000,000
Denomination	£100,000
Security	Unsecured
Listing	Luxembourg Stock Exchange (Euro MTF)

Key financial information	2016/17 £'000	2015/16 £'000 (Restated)	2014/15 £'000 (Restated)
Total incoming resources	62,577	56,235	53,748
Total resources expended	61,612	53,690	53,257
Net gains/losses on investments	0	137	(1)
Net Income for the year	965	2,682	490
Re-measurement on defined benefit pension	0	(242)	(32)
Tangible and Intangible fixed assets	3,337	3,184	1,846
Investment properties	6,154	5,730	5,296
Current assets (excluding cash)	9,720	8,152	7,384
Cash balance	1,269	2,502	1,164
Total Assets	20,480	19,568	15,690
Current liabilities	7,535	7,016	8,300
Long Term liabilities	4,970	5,543	2,821
Total Liabilities	12,505	12,559	11,121

Key financial information	2016/17 £'000	2015/16 £'000 (Restated)	2014/15 £'000 (Restated)
Net Assets	7,975	7,009	4,569
Net cash inflow / (outflow) from operating activities	311	(1,533)	462
Net cash inflow / (outflow) from returns on investment and servicing finance	(199)	(172)	(154)
Net cash inflow / (outflow) from capital expenditure	(1,232)	(999)	(494)
Net cash acquired with subsidiaries	0	818	41
Other cash inflow / (outflow)	246	3,477	190
Increase / (decrease) in cash in the year	(874)	1,592	45

Key financial ratios	2016/17	2015/16
Net asset cover	244%	215%
Requirement as per Covenant	130%	130%
Interest cover	627%	645%
Requirement as per Covenant	250%	250%

Note: Figures for 2016/2017 are unaudited and may be subject to change. In particular, Thera's Trustees have requested a revaluation of Thera's entire property portfolio, the results of which are awaited.

The net cash outflow from operating activities for 2015/16 is largely due to differences in the timing of working capital across the year end. The figures for 2015/16 and for 2014/15 have been restated consequent upon the application of FRS102. In particular, reserves reduced as a result of the introduction of long term pension liabilities of £638,000.

A final payment in relation to a transaction completed in 2013/14 was made in 2016. This transaction related to the removal of restricted legal charges and title covenants on 11 Forward Housing properties. This may result in a prior year adjustment to reserves once property valuations have been completed.

Following the transaction referred to above, Forward Housing has reviewed its portfolio of properties. During the year, several properties have become vacant. Two properties were sold during the year for a net sum of £0.25m. Subsequent to the year end, a further property sale received £0.4m. Funds will be re-invested in property and for Thera's general charitable purposes.

## FINANCIAL YEAR IN REVIEW

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After a period of substantial change in the year to March 2016 - including the acquisition of Aspire Living, Equal Futures and Ansar Projects, as well as the raising of substantial additional financing, last year has seen Thera focus on consolidating the work that we do, supporting more people, further enhancing our profile and embedding the new companies and activities into the Group. There has been no further acquisition activity during 2016-17.

Thera's primary focus throughout the year has continued to be the care, support and services for the growing number of our beneficiaries. We have sought to ensure that they receive the support and services that they require to lead independent and fulfilling lives. There have, however, been a number of significant developments of note.

The Group has continued to benefit from organic growth in many areas and turnover has grown strongly, in particular from the full effect of the prior year's acquisitions. Group revenue has therefore increased compared to the previous year by over £6m (11%) as Thera increased the number of beneficiaries it supports.

Aspire brought the benefits of its balance sheet to the Group, contributing c. £1.8m of assets and approximately £2m of turnover. Aspire was also awarded during the year additional contracts to support a further 110 beneficiaries in Herefordshire. These contracts will add approximately £1.5m of revenue to the Group in a full year.

On an accounting basis, the Group's net surplus has fallen from £2.7m in FY15/16 to £0.97m. However, the prior year figures included the donation of £1.8m of assets arising from the acquisition of Aspire Living. On a comparative basis, the trading surplus has increased from £0.9m to £0.97m.

Thera's total reserves grew in the year by almost 14% to £7.97m. The management continue to pursue a progressive policy of growing its reserves.

The agreement was reached with Cheyne Capital's Social Property Impact Fund. In June 2015, the fund made available, by way of lease to Forward Housing, up to £15m of property across the UK. At the year-end, 46 properties have been acquired since the start of this agreement, benefitting 82 people with a learning disability. A further 32 individuals were found property through housing brokerage during the year. This activity has also delivered a strong increase in rental income for the Group, more than quadrupling this income stream to £571k compared with the prior year, as well as a full year increase in revenue from care and support contracts in excess of £2.6m.

Triodos bond finance was used to purchase the four properties and business of Ansar Projects at the end of 2015/16 and during 2016/17, funded by Thera's first bond, substantial project work to re-provide their residential care services was undertaken to offer people tenancies and to develop their approach to supporting tenants. In addition, Triodos bond finance enabled the completion of a complex ongoing transaction, which saw the removal of 100% restrictive legal charges and title covenants on 12 of Forward Housing's properties allowing their further adaptation, and, in some cases, re-provision to more appropriate accommodation for 56 tenants, as well as major adaptations to a further property for up to 4 tenants.

Financial and transitional support was provided to The Camden Society (TCS) of joining the Group in January 2014. TCS is now reported to have made a surplus for the third consecutive year and is

now sharing its knowledge and best practice of specialist employment and training services with other parts of the Group.

During the year, Thera South West (TSW) experienced some challenging operational and commercial issues, which led to the company making a loss for the year, compared to the previous year's trading surplus. This has had a material impact on the Group's trading performance. The Board of TSW has put in place a recovery plan to address and the company is expected to return to surplus in 2017/18.

Towards the end of the financial year, Thera appointed Sayer Vincent as its new auditors for the 2016/17 accounts.

In the last quarter of the year, most of the companies in the Group made a pay award to their staff above the rate of inflation and ahead of inflation-linked increases in contract income. This was to ensure the maintenance of competitive rates of pay for front-line staff in the labour market. Thera expects contract income to catch up with this award in 2017/18 but the additional cost of this award in 2016/17 resulted in a reduction in trading surplus in the last quarter.

## GOVERNANCE

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Each company within Thera Group has its own board of directors. Most consist of a Chairman, Chief Executive/Managing Director and a Service Quality Director with a learning disability, supported by and working alongside a number of other voluntary directors. On each subsidiary company Board, Thera Trust's corporate membership is represented by a Thera Trust director appointed to that Board.

Thera Trust, the Group's parent charitable company, is governed by a Board consisting currently of ten directors (who are also trustees for the purpose of charity law). The Non-Executive Chairman is Bill Carter who has held the position for eight years and was re-elected during 2016-17 for a further term of office lending stability to the leadership of the board. Four directors/trustees are paid and make up the Group's Executive Team and a further five directors are Non-Executive Directors.

Thera's articles of association state that there must be at least one person with a learning disability within each pool of Executive Directors and Non-Executive Directors. The Group's Executive Team operate as an equal team without a Chief Executive.

A formal recruitment and induction process for all new directors is followed. A Nominations Committee of the board oversees appointments to company boards across the Group and also takes a lead on succession planning for the Thera Trust board.

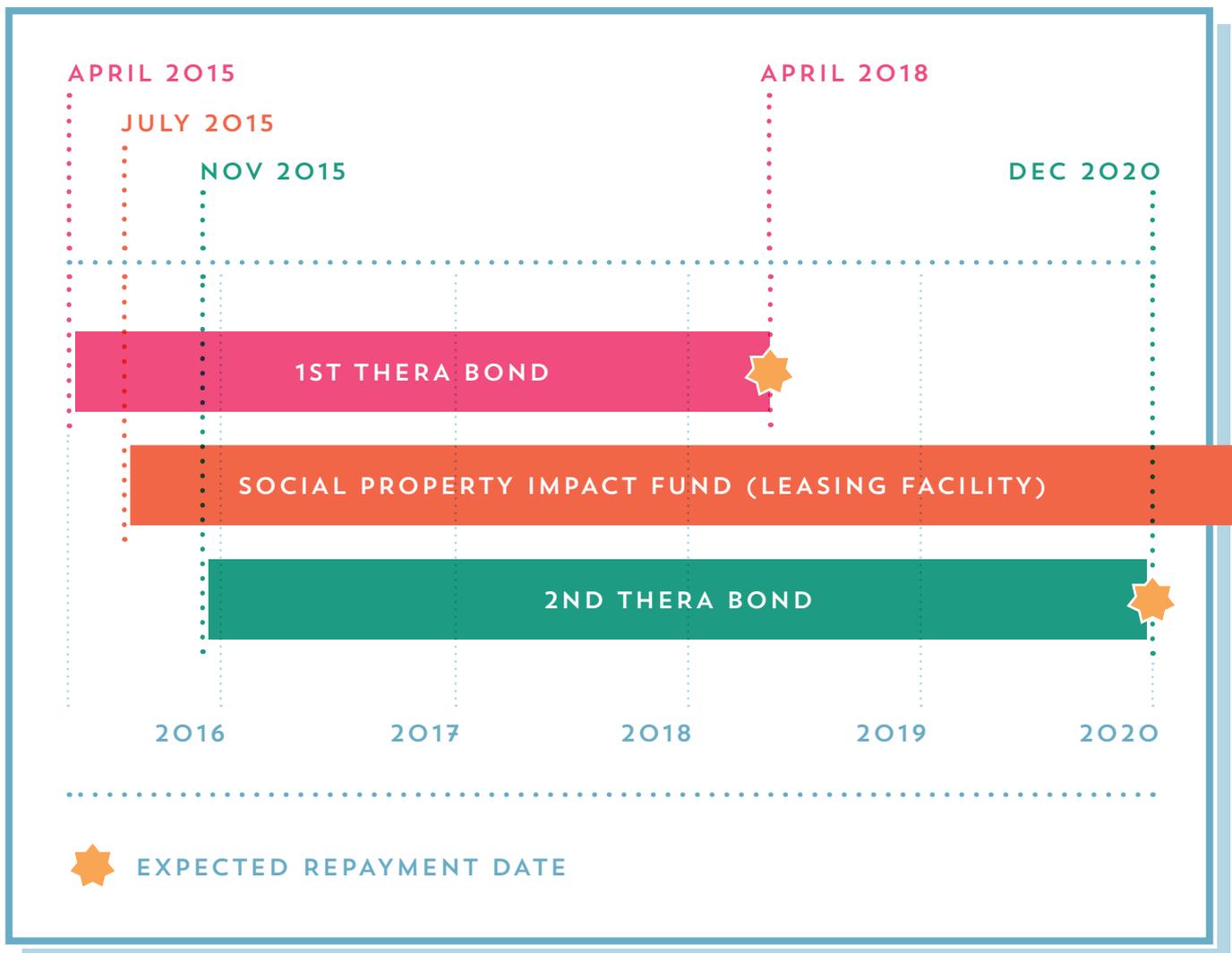
The 2016/17 annual report will be published later in the year with further details.

# INVESTOR HISTORY

In addition to the agreement with Cheyne, Thera has been active in the new area of social investment and has a track record that has enabled it to tap new sources of repayable finance.

This report concerns a Luxembourg Stock Exchange listed bond issued by Thera towards its general charitable purposes. This raised £1m under a £6m programme and offers a 3.5% financial return to investors, repayable in April 2018.

£2m was raised in addition through a retail charity bond in November 2015 via Triodos Bank. This is intended to be used for the acquisition and adaptation of properties to provide homes for people with a learning disability and for Thera's general charitable purposes. This second bond pays a 5.5% return and is repayable in December 2020.

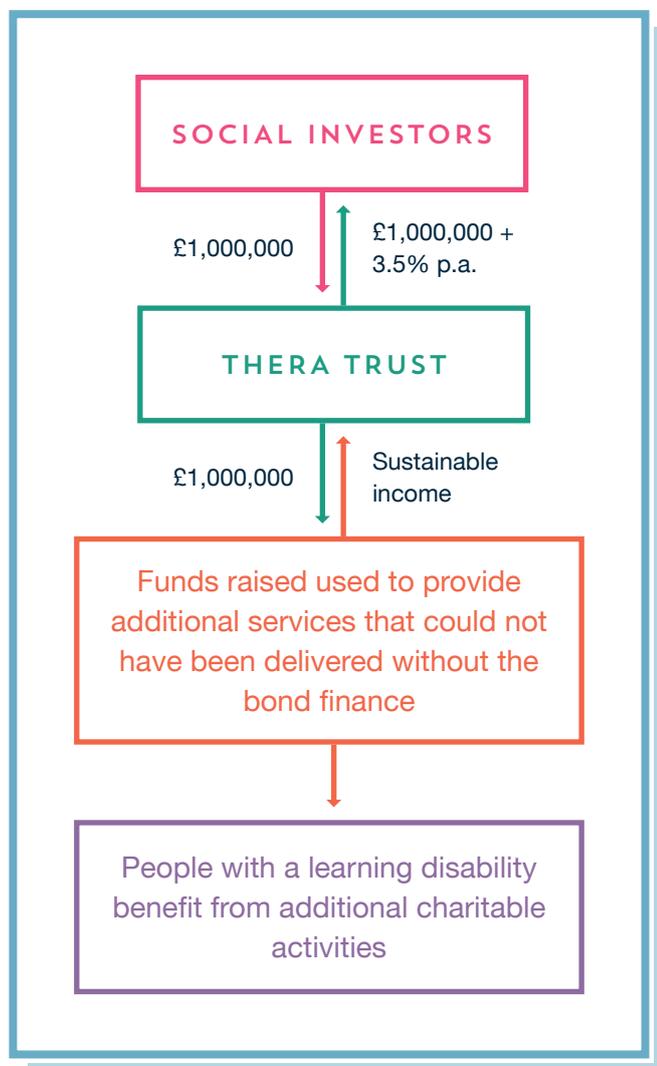


## CURRENT INVESTMENT

Thera is using the proceeds of its first bond towards its general charitable objectives.

During the year, funds have been used across a range of charitable and organisational activities and predominantly to provide additional support and services to individuals with a learning disability. Thera's charitable activities are those which would not normally be funded by contact income.

In the current year, the bond has supported the following specific activities:



- Continued employment of Service Quality Directors and other leaders with a learning disability and completed preparatory work to recruit a further such post in The Camden Society
- Support to continue broadening company membership
- Continued employment of staff in our fund-raising team
- Substantial project work to re-provide Ansar Projects' residential care services to offer people tenancies (with properties funded through Cheyne) and to develop Ansar's approach to supporting tenants
- Project work enabling Thera (Scotland) to support more people – an increase of almost 40% in the number of people benefitting from Thera's support in Scotland
- Project work to re-provide residential care services in Oxfordshire to offer people tenancies (also with properties funded through Cheyne)
- Social investment grants provided once more to both Dosh and The Quality Company
- Project work to establish 82 Crafts and Creations, a new social enterprise in North Cambridgeshire
- Additional training provided to Quality Assessors with a learning disability to embed revised quality standards
- An increase in the number of events to launch "Safe and Secure" to family carers

- Continuing support to “Gig Buddies Scotland”
- Piloting the “Better Lives” project / booklet, supporting people to take forward their ambitions
- Investment in a new coreHR system, as part of the “Thera Online” strategy, providing a “self-service” approach to Thera’s workforce and a more sophisticated information management tool for the organisation
- Development of Thera’s compliance team in response to CQC now treating Thera as a “large provider”

Additionally, the bond has also supported some organisational activity:

- A new Thera website and related social media launched in June 2017 to provide enhanced access to people and their families and to enable an increased organisational profile and tell Thera’s story both to attract excellent staff and raise Thera’s influence in the sector

Repayment is expected to come from retained cash reserves or re-financing.

## MARKETPLACE: POSITION AND RISKS

### Sector Overview

The social care market in which Thera operates continues to experience significant funding challenges as commissioners attempt to reconcile increasing demand within a tighter funding environment. Although limitations on public funding persist and are expected to continue beyond the life of the bond, this has so far had limited impact on Thera’s activities.

Thera supports people with a learning disability in the main who have a substantial and critical assessed need. Accordingly, these individuals are at a much lower risk of having their support reduced because of funding challenges, with local authorities and commissioners prioritising this area of spending to date. Such impact as there has been from reductions in individual commissioned support has been more than overtaken by both organic and acquisitive growth. Since publication of the offer document associated with the bond programme, Thera’s turnover has increased 40% from £44.55m in 2012/13 to £62.58m in 2016/17 and reserves

have grown on a like for like accounting basis by over £3.05m to £7.98m in 2016/17<sup>1</sup>.

Like all care and support service providers, Thera is exposed to a range of external factors that may put pressure on continuing the provision of care and support to a person with a learning disability. However, the specialist area of the market in which Thera works benefits from much lower levels of this as it is in both the commissioning body and the individual’s long term interests to maintain continuity of support, particularly of the high quality that Thera provides.

The sector also faces challenges and risks in relation to employment law. The National Living Wage (NLW) was introduced on 1st April 2016 and this increased further from 1st April, 2017. A range of regulatory and employment law matters relating to the introduction of the NLW continue

1. Thera reserves at March 2013 were £5.62m compared to £7.98m at March 2017. However an FRS102 liability was not included in the former amount, which implies an equivalent figure of £4.93m (£5.62m - £688k) at March 2013.

to present liability and employment risks to the sector and to individual organisations within it.

Within the UK, there is considerable geographical variability in commissioning practice, procurement methodologies and pricing. Thera continues to maintain an efficient and cost-effective organisational structure and is able to mitigate the liability and employment risks of this variability from the diversity of its revenue streams.

In particular The Camden Society is facing a major review of certain contracts in London and Oxfordshire, which may have a material impact on its revenue from 2018/19.

Thera has been able to maintain and expand its market position in part due to its unique approach of both employing paid directors with a learning disability in furtherance of its Vision and from refusing to compromise on its values and the quality of its support. This has provided Thera with a competitive advantage over its sector peers in winning and maintaining contracts, leading to consistently strong ratings from the Care Quality Commission (<http://www.cqc.org.uk/provider/1-101674704>) and continued organic growth.

## Risk Factors

The Board assesses the major risks to which Thera is exposed on an annual basis through a risk management strategy.

Other than those sector risks outlined above, there have been no material strategic changes within the organisation that are perceived to expose the organisation to additional material risk. The Board continues to monitor the external regulatory, funding and employment law environment closely.

Investors bear the risk of the unsecured nature of the bonds, as well as repayment, secondary market and other risks. Other inherent risks that affect Thera are summarised as follows and have been reviewed:

- **Limitations in Public Sector Funding**
- **Damage to Key Relationships with local authorities**
- **Loss of Key Leadership and Management**
- **Personnel Risk and Intervention by Regulator following any breaches**
- **Intervention by the Charity Commission**
- **Litigation and Financial Risk**
- **Pension Risk**

# PLANS FOR NEXT YEAR

## NEXT YEAR

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### WE WILL...



CONTINUE TO DEVELOP OUR LEADERSHIP BY PEOPLE WITH A LEARNING DISABILITY INCLUDING THE DEVELOPMENT OF EXTERNAL NETWORKS, MENTORING AND COACHING OPPORTUNITIES FOR OUR PAID LEADERS WITH A LEARNING DISABILITY



OFFER MORE OPPORTUNITIES TO POTENTIAL LEADERS WITH A LEARNING DISABILITY BY RECRUITING MORE NON-EXECUTIVE (VOLUNTARY) DIRECTORS



CONTINUE TO GROW OUR COMPANY MEMBERSHIP AND FURTHER DEVELOP THE ACTIVE INCLUSION OF THOSE MEMBERS WITH A LEARNING DISABILITY



CONTINUE TO SUPPORT PEOPLE WITH A LEARNING DISABILITY IN THEIR DAY TO DAY LIVES TO SEE A SUSTAINED AND CONTINUED IMPROVEMENT IN PEOPLE'S OPPORTUNITIES FOR GREATER HEALTH AND WELL-BEING, HOUSING AND SOCIAL INCLUSION

# KEY AREAS OF DEVELOPMENT

Following on from the success of our finance-raising and building on the Group's strengthened balance sheet, we expect to go back out to the market during 2017-18 for further finance to support Thera's longer term development

We hope to continue our partnership with Cheyne Capital beyond the current agreement to build on the excellent work undertaken together so far. A further bond will also be issued.

We will enable more people to access the web based Iplanit person centred planning tool and further develop its application

Using learning from the pilot, we will roll out the Better Lives workbook to enable people with a learning disability to recognise their knowledge skills and interests, set life goals in leisure and work and work through a step-by-step plan to achieve these ambitions

We will implement and evaluate pilot projects by Equal Futures to train volunteer Circles facilitators and develop other types of Circles options in addition to the current enduring Circles of Support

TEN project will develop its work with more people building networks and people with formal care and support in their lives, being offered the opportunity to build broader circles.

Having been an early adopter of the NHS England's Stop Overmedicating People with a Learning Disability (STOMP) pledge, we aim to better understand organisationally, our impact on people with complex behavioural support needs, within the context of this pledge.

## PLANS FOR NEXT YEAR

We hope to reach more people with a learning disability to improve their financial control and wellbeing

We will support more entrepreneurs with a learning disability through the continued role out of our 3 year Dolphins' Den programme utilising secured funding

We will complete the development of PROACT-SCIPr-UK® Leaders by Experience programme alongside Loddon Consultancy

We aim to continue to deliver and grow employment and training services to people through opportunities in the Camden Society Unityworks programme, The Quality Company and with other employers and continue to develop similar expertise and programmes elsewhere in Thera Group

As part of our wish to better understand how we know we are doing a good job, we will continued to develop Thera's impact measurement approach and processes

# APPENDIX

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## OVERVIEW OF METHODOLOGY

### The Good Analyst

Investing for Good uses its proprietary methodology, The Good Analyst, to report on the key features of an organisation's impact. These factors are appraised differently by investors, depending on their investment strategy and targets.

### Social Impact

A measure of the investee's capacity to generate positive social impacts. It is based on a weighted assessment of two main criteria:

Mission Fulfilment, which looks at the organisation's impact in relation to its own stated mission, and its fulfilment thereof. We aim to determine that the organisation is fulfilling its mission in a meaningful, well-evidenced, and effective fashion.

Beneficiary Perspective, which considers the organisation and its impact with respect to the value to its beneficiaries of the impact it is creating. By analysing the beneficiary perspective, we can establish that the organisation works with its beneficiaries, and empowers them wherever possible to achieve their own personal goals. It ensures that the progress of beneficiaries, rather than the development of the organisations itself, remains at the heart of the organisation.

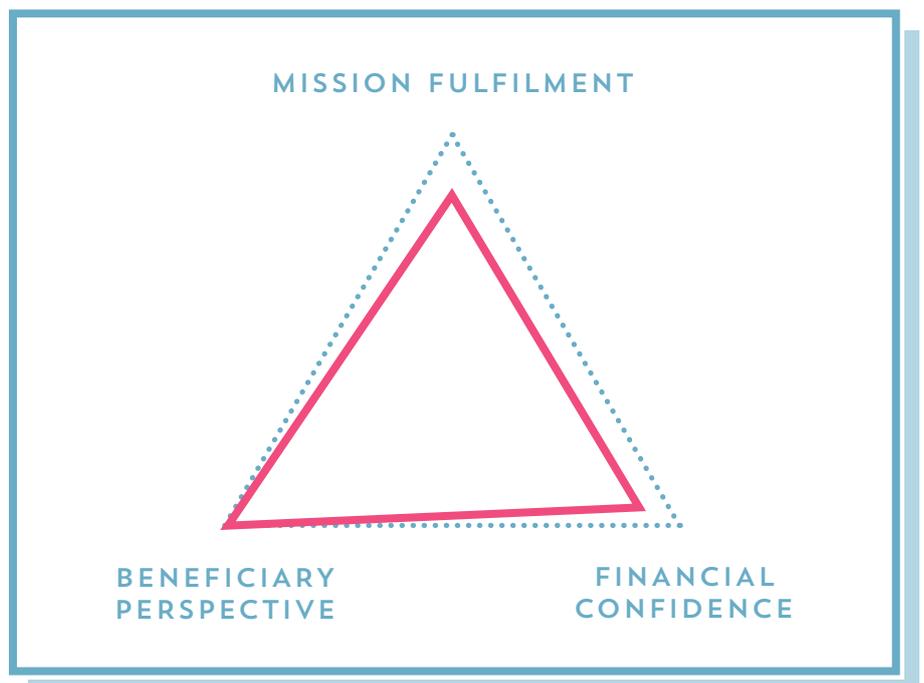
### Financial Confidence

Financial Confidence is a measure of confidence, or risk, in the investment and the underlying organisation. It is based on a weighted assessment of: size, structure, development, operational performance, financials, governance, management and specific risk factors. operations.

In the diagram to the right, the axes represent the key Good Analyst scores, showing the Financial Confidence score and the component parts of the Social Impact Score, Mission Fulfilment and Beneficiary Perspective.

### Thera Trust 2016/17: Breakdown of scores

The points of the inner irregular triangle provide the scores (scaled proportionately) against the different measures.





Report written by Investing for Good CIC, based on information provided by Thera Trust

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