



## ANNUAL BOND REPORT NO. 1 2015 - 2016

This report provides an overview of the social and financial impact performance of Thera Trust in relation to the charity bond that was issued at the end of April 2015. 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**

29.07.2016  
Report no. 1

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# Thera Trust Charity Bond

Confidence 2

Return 3.5%

Impact 1

The investment is rated against three variables. For Confidence and Impact variables, a number between 1 and 3 is awarded for each, with 1 indicating best performance.

**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.

**Return** indicates the level of financial return offered by the investment.

**Impact** is a measure of the investment's capacity to generate positive social and/or environmental impacts. It is based on a weighted assessment of: evidence of mission fulfilment, stakeholder integration, depth of change and breadth of change.

Thera Trust ("Thera") is the sole charitable parent company of a group of companies that work with people with a learning disability. In April, 2015, Thera issued a 3 year, £1m bond offering a fixed coupon of 3.5%.

Thera received a Confidence rating of 2 in this report, signifying an acceptable repayment risk. Thera has achieved increased revenue through a combination of acquisitive and organic growth. Thera exceeded the requirements of the bond's financial covenants, as shown in the compliance certificate of 2015, and Thera reports that these covenants continue to be met.

**Note: Figures for 2015/2016 are unaudited and may be subject to change.**

Thera received an Impact rating of 1. Thera's work is greatly aligned to its mission and the impact of its activities is tangible, as well as supported by clear evidence and data. Thera has undertaken considerable work towards implementing an impact measurement approach and is dedicated to improving its performance based on its results as well as developing further the impact framework. Its approach is highly inclusive and beneficiaries with a learning disability are not only given control and say over their care and support, but are also involved in the control, direction and management of the organisation as a whole.

## Investment Details

<b>Asset type</b>	Bond	<b>Primary Impact Area</b>	Care of disabled and older people, wellbeing and social change
<b>Coupon</b>	3.5% fixed p.a.	<b>Investment size</b>	£1,000,000
<b>Status</b>	Senior, unsubordinated	<b>Denomination</b>	£100,000
<b>Guaranteed return</b>	None	<b>Currency</b>	GBP
<b>Term</b>	3 years	<b>Security</b>	Unsecured
<b>Issue date</b>	28 April 2015	<b>Listing</b>	Luxembourg Stock Exchange (Euro MTF)
<b>ISIN</b>	XS1217934828	<b>Location</b>	UK

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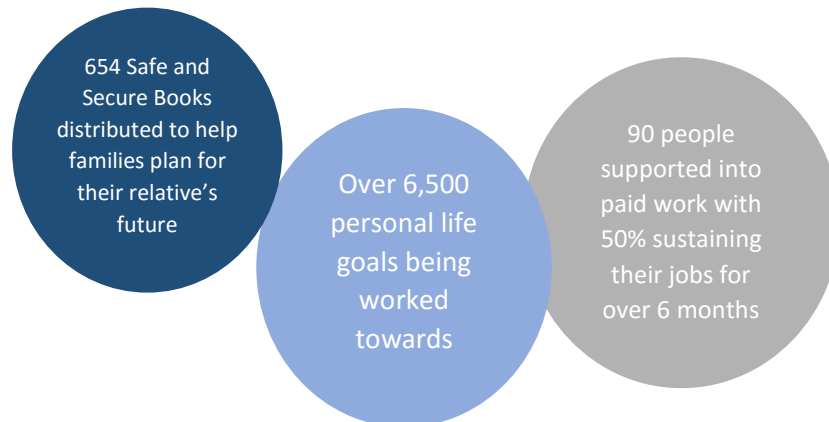
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# Executive Summary

## Financial

- Thera has received a Confidence rating of 2 in this report, signifying an acceptable repayment risk.
- Thera reports income growth of 2% in the year to March 2016, following income growth of 15% in the previous financial year, and records a fifth consecutive year of revenue surplus.
- The bond covenant requirements regarding Asset Cover and Interest Cover were comfortably exceeded as shown in the last compliance certificate (testing date of 31 March 2015) and Thera reports that the covenants continue to be met.
- Thera scored highly on the Confidence aspect of the ratings that relates to its competitive edge in the existing market.
- Thera has successfully met coupon payments to date and maintained a cash balance of £1.9m as at 31 March 2016.

**Note: Figures for 2015/16 are unaudited and may be subject to change**



## Impact

Thera rated highly on Investing for Good's assessment of its impact, receiving the maximum score of 1. This impact rating is based on Investing for Good's Good Analyst Methodology. It considers Mission Fulfilment, which looks at the organisation's impact in relation to its own stated mission. We aim to determine whether the organisation is fulfilling its mission in a meaningful, well-evidenced, and effective fashion. The rating also considers the value the organisation is generating for its beneficiaries. By analysing the beneficiary perspective, we can establish whether the organisation empowers its beneficiaries to achieve their own personal goals, which Thera excels at and embeds in its core philosophy and practical approach.



# Financial Aspects

Note: Figures for 2015/2016 are unaudited and may be subject to change

Key financial information	2015/16 £'000	2014/15 £'000	2013/14 £'000
Total incoming resources	54,690	53,725	46,850
Total resources expended	53,801	53,315	46,638
<b>Net Income for the year</b>	<b>888</b>	<b>409</b>	<b>212</b>
Tangible and Intangible fixed assets	3,510	1,846	2,831
Investment properties	5,296	5,296	4,118
Current assets (excluding cash)	7,535	7,384	7,041
Cash balance	2,191	1,164	1,108
<b>Total Assets</b>	<b>18,531</b>	<b>15,690</b>	<b>15,098</b>
Current liabilities	6,436	8,219	8,477
Long Term liabilities	4,727	2,214	1,796
<b>Total Liabilities</b>	<b>11,162</b>	<b>10,433</b>	<b>10,273</b>
<b>Net Assets</b>	<b>7,368</b>	<b>5,257</b>	<b>4,825</b>
Unrestricted funds	3,777	1,654	1,270
Restricted funds	3,591	3,603	3,555
<b>Total Funds</b>	<b>7,368</b>	<b>5,257</b>	<b>4,825</b>

- Net incoming resources increased from additional activity
- Two new companies increased reserves and turnover
- The cash and working capital position substantially increased due to bond finance
- Creditors decreased due to differences in the timing of working capital across the year end

Key financial information	2015/16 £'000	2014/15 £'000	2013/14 £'000
Net cash inflow / (outflow) from operating activities	(998)	406	127
Net cash inflow / (outflow) from returns on investment and servicing finance	(166)	(154)	(107)
Net cash inflow / (outflow) from capital expenditure	(964)	(494)	(952)
Net cash acquired with subsidiary	816	41	245
Net cash inflow / (outflow) from financing	2,850	92	(264)
<b>Increase / (decrease) in cash in the year</b>	<b>1,538</b>	<b>(109)</b>	<b>(951)</b>

Key financial ratios	2015/16	2014/15
Net asset cover	207%	244%
<i>Requirement as per Covenant</i>	<i>130%</i>	<i>130%</i>
Interest cover	598%	468%
<i>Requirement as per Covenant</i>	<i>250%</i>	<i>250%</i>

NB: 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

## Year in Review

### Background and Context

Formed in 1998, Thera is a charitable group of companies that supports adults with a learning disability, at home and in the community and with specialist services. The organisation developed a group structure in 2003 to ensure continued delivery of its mission, enabling its beneficiaries to control and be involved in the organisation that provides their support and to better work with their local communities whilst providing an infrastructure for future growth. There are now 18 companies in the Group that provide support and services across more than 40 Local Authorities. Thera's main activities are the provision of care and support to tenants and others with a learning disability both at home and in the community, short break and financial advocacy services and support with employment and training.

In 2012 Thera reviewed its strategy, anticipating that personalisation in the social care sector would lead to more people wanting to be supported by Thera with a consequent increase in its turnover. It decided to invest in and re-structure its workforce, to invest in technology to help increase independence of its beneficiaries in their day to day lives and to invest in the capacity of people's local communities to welcome and support its beneficiaries.

A key part of this strategy was to source property – 'an ordinary house on an ordinary street' – for beneficiaries with complex support needs, including needs arising from complex behaviour. These individuals require specially adapted accommodation to live an independent life.

In addition, Thera determined that it needed to raise both long and short term finance to fund its strategy and its general charitable activities. It is in this context, that the bond finance was raised in 2015.

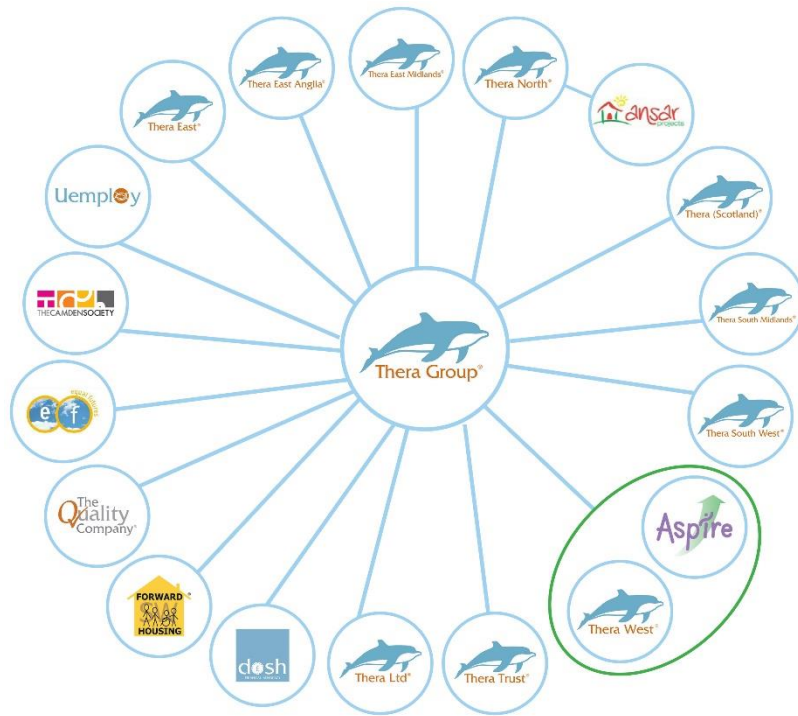
### Key Developments during 2015-16

- Approximately 120 additional beneficiaries supported in the year
- Working in six new local authority areas including three in Scotland
- Aspire Living joined the Group and acquisition of Ansar Projects
- Agreement to make available up to £15m of off balance sheet property signed with Cheyne Capital's Social Property Impact Fund
- Two corporate bonds successfully raised £3m
- Recruitment of an additional Service Quality Director and agreement reached with a further two companies to each employ one
- Strengthening of Impact Framework to measure impact delivery
- Progress in recruitment of voluntary directors to the company boards
- Continued turnaround of The Camden Society
- Thera's first Investors in People Gold Award
- Other major initiatives run including TEN project, Gig buddies, Arts Retreat, Strathmartine Hospital Histories project and the publication of the Safe and Secure (England) book

### Key Financial Performance Highlights during 2015-16

- Net incoming resources have continued to increase
- Thera has continued to implement its strategy and develop the infrastructure supporting an increased level of turnover, surplus and reserves
- An increase in underlying activity towards the year end has had the effect that turnover in 2016-17 is projected to exceed £59m
- Two new companies have joined the Group, the impact of which has increased turnover, fixed assets and reserves
- As a result of bond financing completed in the year, Thera's cash and working capital position has substantially increased
- In the latter part of the financial year, properties purchased and leased have started to deliver revenue growth
- Net asset and interest cover covenants have been exceeded for a second year

Note: Figures for 2015/2016 are unaudited and drafted on the basis of UK GAAP. They may be subject to change. There will be a further adjustment in relation to pension liabilities and property re-valuation with the move to FRS 102. Long term pension liabilities of £0.8million will be brought into the statutory accounts for 2015-16 as a result of new accounting regulations, although these do not represent additional costs on the income statement.



## Structure

Thera is a group of companies led by the Thera Trust, which is itself a registered charity. The Group consists of 18 individual companies, of which four others are also registered charities. The majority of Thera's activity and turnover arises in regionally-based companies, such as Thera North and Thera East Midlands, which

provide care and support services to people with a learning disability. Other companies provide specialist support services to Thera's beneficiaries. For example, Dosh provides financial advocacy and appointeeship services which enables people with a learning disability to have more control over their money. The Group is structured with similar articles of association in each company and an Intra-Group Agreement, which sets out the covenants and obligations to which individual companies adhere.

## Development

### History

Thera began supporting people with a learning disability in 1998, supporting five people in Cambridgeshire. By 2003, it had grown to such an extent that an organisational restructure was required to enable it to continue to deliver its Vision. At this point, the current structure - a group of companies led by a charity - was adopted.

Thera continued to support more people across the UK through organic and acquisitive growth, establishing a number of regional companies. Responding to the needs of its beneficiaries, Thera also established some nationally focussed companies providing specialist services. Other companies have joined the Group either through purchase or, in the case of already established charities, without consideration.

With four companies joining Thera in the space of two years, Thera is now focused, alongside its day to day support of its beneficiaries, on further developing the infrastructure required to benefit from this growth. For example, information technology, finance, governance and human resources functions will continue to be strengthened in order to underpin a larger organisation.

Future plans do not assume new regional companies but rather Thera expects to support more people within existing companies' geographic boundaries, including in new local authority areas. There are a considerable number of people for whom Thera is expecting to provide support.

*Thera is expecting to provide support to a growing number of people and the challenge lies in recruiting sufficient skilled staff to undertake this work.*



### This year's developments

Thera's main focus throughout the year has been the continued care and support of the growing number of its beneficiaries. It has 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.

Equal Futures joined Thera Group at the end of January 2015. Equal Futures continues to work with families to develop circles of support around their family member who has a learning disability.

Aspire Living joined the Group in November 2015 at nil consideration. It brings c.£2m of turnover and c.£1.5m of assets to the Group. Thera West has transferred its activities in Worcestershire, Gloucestershire and South Gloucestershire to the Herefordshire-based Aspire and is now dormant.

At the end of March 2016, Ansar Projects, a small company that currently supports around 30 young adults with a learning disability and autism, was purchased, adding c.£1m in turnover and a high EBITDA. This company will be owned, directed and managed by Thera North.

Thera has invested heavily in its staff and the development of their skills over recent years. This year it worked with Inclusive Solutions to provide training in person centre approaches and community mapping. In addition, 25 PROACT-SCIPr-UK® Instructors have retained their qualification through The Loddon School and a further three have newly qualified in this positive behavioural approach, which enables instructors to support the making of behaviour support plans including audit based physical interventions for people with complex behavioural needs. 51 Thera managers have completed Thera's own Institute of Leadership and Management (ILM) accredited level 5 Certificate in Leadership and Management with a further 26 people currently working through the qualification.

Thera developed and launched its own Care Certificate in April 2015. The Care Certificate has been incorporated into Thera's induction programme for new staff. 100% of staff are currently achieving Thera's Care Certificate within the advised

12 week timeframe of the strategic body for workplace development, Skills for Care.

Other projects this year include Gig Buddies, which aims to link music fans who have a learning disability with other music lovers for concert nights. This is in partnership with the charity Stay up Late, which promotes the rights of people with a learning disability to have a choice about their social lives.

The Strathmartine Hospital Histories project ran from July 2014 to September 2015. This project recorded the stories and life histories of those who lived and worked at what is believed to be the oldest hospital for people with a learning disability in Scotland and the second in Britain.

Thera published Safe and Secure (England) in October 2015. Launched in Gloucestershire, Safe and Secure is a book which acts as a manual to give advice and tools to families to ensure their loved one has a safe and secure future, surrounded by people who care about them even when family members are no longer alive.

## Governance

### Board

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.

Chairmen meet every six months to share ideas about board development, governance and organisational strategy. Similarly, Chief Executives/Managing Directors and Service Quality Directors have their own liaison groups.

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 seven years. Four directors/trustees are paid and make up the Group's Executive Team and a further five directors are Non-Executive Directors - Christine Chang, Peter Jones, Michael Morgan, Martin Pilkington and Brian Young.

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. A formal recruitment and induction process for all new directors is followed.

### Executive Team

Thera's Executive Team consists of four paid directors/trustees who are all equally responsible for decision making. Further details on the experience of the Executive Team are provided as follows:

#### **Jenny Garrigan – Joint Director of Quality and Involvement and of Strategy and Performance**

Since qualifying as a nurse for people with a learning disability in the mid-1980s, Jenny Garrigan has spent her career supporting people with complex needs to move on from institutional environments and have more opportunities as well as to take control of the design and delivery of their own support. She has worked in the NHS and for local authorities leading and managing a range of provision, before working in the independent sector. Prior to being a director with Thera, she led the development team in a specialist NHS Trust.

#### **Matthew Smith – Joint Director of Quality and Involvement**

Matthew Smith is a man with a learning disability who started his career supporting people with a learning disability through the Advocacy movement, both in setting up groups and through his employment with the British Institute of Learning Disability (BILD), monitored the performance of advocacy groups. Matthew brings both his personal and professional experience to the director role in Thera, ensuring that the quality of support Thera provides is monitored and that people are fully involved in the planning and delivery of their support.

#### **Simon Conway – Joint Director of Strategy and Performance and Company Secretary**

Simon Conway studied Classical Archaeology at Cambridge University before starting his career with the National Audit Office. He worked for Cambridgeshire County Council in their Education Finance Department, and then in the National Health Service, where he has worked in both acute and community health trusts, latterly as Finance Director. Simon has also been a voluntary director for a number of housing organisations, including Boston Mayflower.

#### **Karen Boyce Dawson – Director of Operations**

Karen has 30 years' experience in supporting people with a learning disability in a variety of roles. Karen qualified through the years as a therapist and social worker before moving into operational Senior and Executive Director positions some 15 years ago. Karen is driven daily to achieve better support for people with a learning disability so that they in turn have more control and better lives. As Director of Operations, Karen ensures that Thera has the resource and capability to deliver the best quality support in line with Thera's vision. Over recent years this has meant leading on the review and re-design of management structures, operational systems and processes and implementation of group performance management frameworks.

## Investment Detail

### Investor History

This report concerns the first bond issued by Thera towards its general charitable purposes, which raised £1m under a £6m programme listed on the Luxembourg stock exchange and which offers a 3.5% financial return to investors.

In November 2015, £2m was raised through a second bond issuance 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 on 31 December 2020.

An agreement was also reached with Cheyne Capital's Social Property Impact Fund in June 2015. The Fund will make available by way of lease to Forward Housing up to £15m of property across the UK. Forward Housing works with individuals and their families and wider circles of support to identify and adapt a suitable property which is then sub-let to a Registered Housing Provider (RHP). The RHP offers an assured tenancy to individuals with a learning disability, providing them with long term security of accommodation. At the year end, 26 properties have been acquired, benefitting 52 people with a learning disability that are supported by Thera. A further 12 individuals were found property through housing brokerage.

### Current Investment

As stated in the 2014/15 annual report, Thera intends to use the proceeds of its first bond towards its general charitable objectives.

During the year, funds have been used predominantly to provide additional support and services to individuals with a learning disability that will positively impact on their lives. Thera has also undertaken the following specific activities:

- Increased the number of Service Quality Directors as paid directors with a learning disability employed on local company boards
- Grown take-up of company membership amongst people with a learning disability, requiring active engagement
- Ran the 'TEN project' in Scotland, which investigated how informal networks can be built around a person with a learning disability as a means of increasing their independence of paid staff support
- Provided continued cash and transitional support to the Camden Society, which was experiencing extreme financial difficulty at the time of joining the Thera Group in January 2014 under a turnaround strategy. The Camden Society is reported to have made a surplus for the second consecutive year having previously, before joining the Group, returned a deficit of around £2m
- Invested in Forward Housing to respond to the opportunity facilitated by Cheyne Capital's funding to purchase and adapt more property.

Repayment is expected to come from retained cash reserves.

## Marketplace: Position and Risks

### Sector Overview

The social care market in which Thera operates is in a state of flux at the moment due to funding challenges. However, although limitations on public funding persist and will likely continue beyond the life of the bond, this has so far had little impact on Thera's own activities. Thera supports people with a learning disability in the main who have a substantial and critical assessed need and thus are at a much lower risk of having their support reduced because of funding challenges.

Within the UK, Thera see considerable geographical variability. There are differences in the ways local authorities commission and procure social care and in the unit prices local authorities are willing to pay for care and support. As a consequence, Thera has maintained a lean organisational structure.

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.

### Risk Factors

The Board assesses the major risks to which Thera is exposed on an annual basis through a risk management strategy. There have been no material strategic changes at Thera that are perceived to expose the organisation to additional material risks. Investors bear the risk of the unsecured nature of the bonds, as well as repayment, secondary market and other risks. Risks that affect Thera are summarised as follows:

- Addition of smaller companies to the Thera Group and integration risk
- Changes in the UK Property Market
- Public Sector Funding Cuts
- Changes in Government Policy regarding Disability allowances

- 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 Risk including in relation to recent developments in employment law such as the National Living wage
  - Pension Risk

# Impact

## Impact Overview

Mission: Thera's mission is to work closely with and for people with a learning disability to empower them and support them to lead full, productive lives. The organisation does 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. Thera's Vision is set out below:

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

## Impact Rating Rationale

**Thera received the maximum score of 1 for its impact:** a measure of the investee's capacity to generate positive social and/or environmental impacts. It is based on a weighted assessment of two main criteria:

- **Mission Fulfilment:** this looks at the organisation's impact in relation to its own stated mission. Here, Thera received a high score. Not only is Thera's impact clearly demonstrated, but it is also evidenced by outcome data and supported by qualitative feedback and information. Thera has worked to build and use a comprehensive impact measurement and reporting system. While it can still be improved, Thera is dedicated to continue gathering impact evidence and acting on its findings.
- **Beneficiary Perspective:** this 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.

A high score was awarded here because the depth of Thera's services for learning disabled people is impressive. They engage with beneficiaries across all their services to provide them with as much choice and control as possible over their lives and to ensure their care, support and services are relevant and satisfy their needs. In addition, the breadth of their services means that people with a learning disability are provided with the opportunity to improve the quality of most aspects of their lives.

## 1. Mission Fulfilment and Activities

Input	What we do	What we deliver	What we aim to achieve	Our Impact Goals
Thera Group provides, through Individual, LA, & CCG contracts, well trained and experienced care and support, technical, job training and coaching staff	Individual (Direct) Support	High quality care and support provided through active person centred life plans, care and support plans and health action plans	People feel empowered and self confident (see detail)	People with a learning disability will have increased personal and social wellbeing Quality of support will be checked by people with a learning disability
	Financial Advocacy and Corporate Appointeeship	Effective financial advocacy and financial planning for personal money and care budget	Increased financial wellbeing Increased choice and control over personal money and Care and Support budget	People with a learning disability will have increased financial wellbeing
	Employer Support	Support and guidance to people with a learning disability to employ their own staff	People choose, recruit and employ their staff	People with a learning disability will have increased opportunity to employ their own staff
	Housing Support	Housing brokerage support received and tenancies achieved	People find somewhere to live, and have & maintain a home of their own, which meets their needs and wishes	More people with a learning disability with complex housing needs will have access to housing that meets their needs and wishes
	Employment, Training and Social Enterprise Programme	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 have improved work or business skills and confidence People gain and sustain work People gained accredited qualifications People are job ready More people have access to an increased range of in-work training schemes or apprenticeships More employers have increased awareness of how to support people with a learning disability into work	More people with a learning disability will have increased employment opportunities
	Supporting Entrepreneurs	People participating in Dolphin's Den and in a range of work skills training including travel and benefits advice	People are able to gain employment or set up their own business/ community project People feel empowered and self-confident as a result of their participation on Dolphin's Den	People will have increased confidence setting up their own business or community project
	Promoting people's place in society	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	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	Thera will demonstrate that people with a learning disability can be leaders in society
	Community Capacity Building	People and their families supported through the development of circles and networks of support including those who have formal care and support in their lives. Families have access to the Safe and Secure (England) approach	People supported through TEN approach, increase their independence and reduce their reliance on paid staff People broaden their social networks beyond their family, families take the opportunity to plan with their child, a well supported future beyond the life of their parents	People with a learning disability who have formal care and support will have broader social networks.  Families will have the tools to develop their future plans for their relative with a learning disability and build circles of support sustainable beyond their (the parent's) lives

To achieve its mission, Thera offers a set of eight ‘services’ to individuals with a learning disability. These services include:

### a. Individual (Direct) Support

*Service goal: People with a learning disability have increased personal and social wellbeing*

Personal and social wellbeing includes people having control of their own care and support with the help of friends and family, and staff teams actively supporting people to develop a person centred plan for their life and to work towards their goals and ambitions in relation to their relationships, home, finances, physical health, mental wellbeing, community involvement and safety.

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

For many people with a learning disability, this can mean a confusing array of hurdles, unpredictability, a world whose rules are complex, with physical barriers to overcome. Thera’s support teams work with people on an individual flexible basis to support every element of the day, week, month and year – both with structure where needed and room for spontaneity. Thera actively seek and develop support staff who are enthusiastic about the work that they do with people and who work within the vision and philosophy of Thera.

## Impact

*Note: This section and all subsequent Impact sections contain information on the impact Thera has had this past year against each of its target outcomes in each service. We focus here on the reporting the organisational impact of Thera as a whole and do not focus on the specific impact of the bond as the bond was unrestricted (see Financial Aspects section).*

iPlanit is a web- based person centred planning tool where people enter and track their personal goals against various categories of outcomes, such as being part of the community, choosing where to live, employment, managing one’s money, etc. The tool is interactive and enables people to personalise their plans with photographs, video, audio and text. These plans can be shared, with set permissions, with friends and family and updated in real time. Thera has made this tool available to the people it supports using funding from the bond. The data below is taken from a sample group of 342 people who are actively using iPlanit to show the types of personal ambitions being supported. The table also includes data from a survey of Thera’s Community Support Leaders, relating to around 50 people supported by Thera who have had a local authority Statutory Care Management review during the year, to gain feedback on people’s involvement in, and others views on, Thera’s approach to Person Centred Planning with people and the impact this has on their lives

## Quality Assessment

In addition to the range of operational data that is collected, quality assessments are commissioned from The Quality Company by the Service Quality Director in each of Thera’s subsidiary companies providing direct care and support. The Quality Standards are designed to enable people to have a voice about the support they receive through a peer quality assessment process.

Service Outcome	Impact Results	Quality Company Rating <sup>1</sup>
Support plans delivered to a high standard, including those aspects which relate to complex specialist needs	1,102 people <sup>2</sup> were supported this year providing an average 196,115 hours of support per month Around 566 people per month received intensive 24 hour care and support	96.5% of support was rated as standards fully met
People are able to identify and achieve their life goals	Over 6,500 personal life goals being worked towards Over 70% felt that the support they received and the goals they had identified and achieved had led to positive change and opportunities in their life within the year.	Thera's Quality Standard 1 'Leading Your Own Life' picks up on Person Centred Planning as one of the quality indicators. 91% were assessed as having active and accessible Person Centred Plans, with 1% partly meeting the standard
People are able to maintain their health and lead a healthy lifestyle	Over 70% state demonstrating positive changes in their health and wellbeing as a result of the support they have received across the year  44% achieved their goals regarding health and lifestyle  50.5% still working towards their goals regarding health and lifestyle	N/A ( <i>performance indicators for the Quality Standards assessed by The Quality Company have been further developed and are to include health planning from 2016</i> )
People are in control of their own home and choose who they live with	34.5% achieved their goals regarding their living choice 63% are working towards their goals 2.5% have not achieved their goals	Quality Standard 5 'Your home' was rated 95.5% fully met
People are safe and secure both at home and in the community	56% of objectives regarding this outcome are being worked towards with 40% already achieved. Over 83% state that their support plan has enabled people to be actively supported to feel and be safer in their home and community	Quality Standard 6 'Being Safe' was rated at 100%. The indicators are being further to develop to assess Safety more broadly
People are supported by staff they have recruited and that they want to support them	95% stated that people and their circle of support are happy with the team that supports them and like the fact that they are involved in recruiting any new staff. Over 4% neither agreed nor disagreed.	Quality Standard 2 'Designing Your Support' covers people and their circles of support being involved in their staff recruitment. This standard rated 99.6% fully met
People with complex behavioural support needs, increase their independence and reduce their reliance on paid staff	Behavioural incidents of people with complex needs were reduced by 20% on average, with only one location seeing a rise of 8%. <i>Note: this is subject to significant change due to variables noted in the text below</i>	N/A ( <i>there are no material differences in the quality ratings between people with or without complex behavioural support needs</i> )

<sup>1</sup> See grey box on next page

<sup>2</sup> People who receive more than 30 hours of support a week i.e. care and support provided at home and in the community intensively week to week



- **Support plans are delivered to a high standard including those aspects which relate to complex specialist needs:**

Due to the individual and personalised nature of support planning, it is not possible to collect data at an organisational level. The effectiveness of detailed planning and the impact it has on people's lives can instead be demonstrated through people's stories and comments.

For people with complex behavioural support needs, specific individual behavioural support plans are essential to support someone to manage their own behaviour and to guide staff appropriately to support people in a way that enables them to be understood and have control over their environment and those around them. Plans will provide guidance on how best to act to prevent an incident and to understand what agreed measures are in place to intervene, should an incident occur.

*John's care was transferred to Thera from another support provider; his previous staff joined Thera which enabled continuity of care. John has a range of complex behavioural challenges. Upon joining Thera, a full review of his care and home environment was undertaken, which resulted in the staff changing their approach and embracing a new method of ensuring positive behavioural support in a positive environment. A sustained programme of staff learning enabled them to develop their approach to create support plans to guide the staff team. This enabled John to take control in a way that keeps him and others safe - for him to calm down in his own time in his own space.*

#### The Quality Company

The Quality Standards are designed to enable people to have a voice about the support they receive through a Quality Check process. This process is unique to other audits as it is undertaken by a peer with a learning disability. This enables Thera to look in further detail at its performance from the perspective of those who are receiving the support they provide.

The standards are rated as fully met, partly met or unmet. Each Quality Standard consists of various indicators. The standards relate to:

- 1: Leading your own life
- 2: Designing your support
- 3: Having a say
- 4: Your community
- 5: Your Home
- 6: Being safe
- 7: Controlling your Thera Company

- **People are able to identify and achieve their life goals**

We can see from the data above that people are being supported to identify life goals in each of the key areas in their lives, from home, taking part in community activities and managing their own money to working towards employment and health goals. Over 70% of people surveyed felt that the support they received and the goals they had identified and achieved had led to positive change and opportunities in their life within the year.

- **People are able to maintain their health and lead a healthy lifestyle**

Health, Lifestyle and Culture is the life goal that most people are working towards. Just over 44% of them have so far achieved their goals. Goals in this area cover self-confidence, personal hygiene, increased social contact, improvements in taking own medication, support to attend health appointments, healthy eating, positive mood, increased independence leading to reduction in support hours, decrease in prescribed medication, maintaining good health and a positive approach to mental health issues.

- **People are in control of their own home and choose who they live with**

There was a much lower proportion of people who have set ambitions around choices of where to live and who to live with. A reasonable working assumption would be that major decisions such as a change of house, are made by a small number of people each year and this then becomes the main focus of their planning activity. Therefore, once the move has taken place,

people's life plans for where they live are not likely to feature in their continued plan. This will also reflect the reality that the majority of people Thera supports have been receiving formal care and support for the majority of their lives and are people who have more recently been helped by Thera to experience the development of their care and support into shared accommodation as a first move from long-stay in-patient care. Some individuals are also limited in their choice of where they live by a local authority's approach to commissioning.

- **People are safe and secure both at home and in the community**

56% of objectives set against this outcome are currently being worked towards and 40% have been achieved<sup>3</sup>. These objectives and impact on people's lives include, among other things, changes in home circumstances, positive risk management to increase confidence, strategies to help develop relationships with neighbours and wider community, increased independence in activities that leads to people's increased enjoyment of tasks, support from health and other social care professionals, enjoying the company of other people sharing the house, interpretation of a person's needs and active support to enable them to take control of their home and who is invited into it.

- **People are supported by staff they have recruited and that they want to support them**

Thera has been working to improve its human resources data collection as part of its development of an online self-service option for its staff; it is expected that fuller data will be available in 2017/18 regarding how many people are actively involved in the recruitment of their own staff and how that impacts their lives. The short survey showed over 95% stated that people and their circle of support are happy with the team that supports them and like the fact that they are involved in recruiting any new staff. Over 4% neither agreed nor disagreed.

Thera has developed a "staff matching tool". Led by the needs, wants and wishes of the person with a learning disability, staff are supported to complete a self-assessment of their own traits and characteristics and how these might match a new style of support and people's revised life ambitions.

In August 2015 Thera Trust ran a small Arts Retreat attended by 10 people with a learning disability and 10 of their chosen support staff. This offered the opportunity to learn how each person would describe good support, to explore and celebrate it.

*A gentleman moving into his own flat for the first time, with the help of family and Thera development team, created a detailed personal profile, then mapped out the compatibility traits and characteristics he required for his new staff team. He and his family were supported to be part of the staff recruitment process, led by the specification he created – having a clear idea of the sort of people being looked for, in addition to the skills, knowledge and experience required for the roles.*

- **People with complex behavioural support needs increase their independence and reduce their reliance on paid staff**

Thera has an established reputation for supporting people with complex behavioural needs. Out of all people who have a learning disability, it is well known that this group of people are some of the most vulnerable to receiving poor support. Thera's work this year has included identifying and analysing, across the organisation, the number of people Thera supports who have complex behavioural support needs and the type of support needs they have. This has posed Thera with a real challenge as it

<sup>3</sup> 133 people working on objectives related to this outcome with a total of 253 related objectives

has required them to define what they mean by complex behaviour and organisationally link this definition to people. "We are clear that we are not labelling the person, but solely describing their support needs" (Thera Trust Transforming Care Steering Group).

Thera has adopted the following definition in its strategy on supporting people with complex behavioural needs:

*"Behaviour can be described as challenging when it is of 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*

Thera reports that it takes a positive behavioural approach to meeting people's needs. In the main, a reduction in the number of behavioural incidents can be seen across the Group, with the trend applying to all subsidiaries except one, which is clearly positive. However, it has been noted that there are three contributing factors to variances in numbers of incidents

- Staff recognising behavioural challenges when they work with the person all the time and build a positive relationship
  - Under reporting to 'protect' the person from negative labelling
  - Staff training updates reminding staff to highlight the need for reporting, producing a spike
- **Assessors with a learning disability feel that support is good**  
Assessed by a team of Quality Assessors with a learning disability and their Quality Partners, 96.5% of support was rated as standards fully met.

*People are supported by staff they have recruited and that they want to support them – the Arts Retreat*



*"I didn't realise the lady I support thought making memories was one of the attributes she wanted in a support worker. Don't underestimate what the people you support can do."*  
(Amanda)

The Arts Retreat took place on 11, 12 and 13 August 2015. It was held at Hothorpe Hall in Leicestershire. Twenty people attended to celebrate great support.

*"Although I have supported the lady I was with I didn't know one of her favourite things was walking in the dark. There are always new things to learn about someone you support!"* (Lindsey)



INVESTING FOR GOOD

## b. Financial Advocacy and Corporate Appointeeship

### *Service goal: People with a learning disability will have increased financial wellbeing*

Thera provides these services through one of its not for profit subsidiary companies called Dosh Ltd, set up in 2008. Dosh helps people with a learning disability to be more independent and have more control over their own money. In its short history, it has built up its clientele covering Scotland, England and Wales, supplying services to over 450 people. Most of the people Dosh supports receive appointeeship and financial advocacy services, which includes support with welfare benefits, bills and budgeting. The target outcome these services seek to improve is financial control, security, management and stability.

### Impact

Increased financial wellbeing	Dosh has supported 28 people to move from Disability Living Allowance (DLA) to Personal Independence Payment (PIP) and everyone has either stayed on the maximum award or increased their income. On average, the 24 whose income has increased have gained £2,388 per year
Increased choice and control over personal money	An average of 450 people each month supported with individual plans to control their money 99% <sup>4</sup> of those surveyed stated that the Dosh Promise had been met (see blue box below) 98% <sup>5</sup> of people surveyed are happy with the support their friend/relative/person supported receives

Dosh aims to support each individual in a person-centred way as stated in the Dosh Promise – a set of statements co-produced with people with a learning disability and their families:

- I will be able to use my money to do the things I want
- I can be as involved as I want in my money
- I will spend my money in the way that I want
- I will get the information I want about my money in a way I can understand
- I will have my own financial advocate who visits me, knows what I like and listens to what I want
- My financial advocate will give me support and information to help me manage my money
- Dosh will tell me about my money, what they are doing and answer my questions
- Dosh will help me to keep my money safe

These statements are being used to measure Dosh's impact and success through our Annual Review process – Full 2015 figures will be available later in 2016.

The support provided by Dosh means that people with a learning disability have direct access to their own money, with one-to-one support from their own Dosh advocate, to spend in their day to day lives and on the things they enjoy. People have been supported to achieve their goals, whether that's to pay their bills, save money for their first holiday abroad, learn to budget, or start a new activity. After various projects and stakeholder consultation, Dosh have created a series of factsheets for family carers who are involved in managing money for a relative as findings showed that many family carers find it complicated and stressful to support their relative with money. The factsheets give key information on topics such as welfare benefits and banking; these have already received positive feedback from carers' networks and their members.

<sup>4</sup> 20% survey completion rate, 319 people asked to complete the survey. Results as of August 2015

<sup>5</sup> 23% survey completion rate, 319 relatives/people in circle of support asked to complete the survey

*When Dosh began supporting one individual in the summer of 2015, she had rent arrears, several months' worth of suspended DLA Care payments and no savings. After receiving support from Dosh, Dosh able to claim back payments for DLA which allowed her to pay off all of her rent arrears. With continued support, she was also able to regularly save money and build a large amount of savings. With the money saved she has bought a new sofa, and booked a beach holiday, something she has always wanted to do. Thanks to Dosh, she can now afford to buy and do things she could not before.*

### c. Employer Support

*Service goal: People with a learning disability will have increased opportunity to employ their own staff*

Thera created Uemploy as an employment agency to support people with a learning disability to employ and manage their own Personal Assistants

The target outcome for Uemploy is for individuals with a learning disability to effectively employ their own support staff, Personal Assistants (PAs), which promotes personal well-being in the areas of independence, leadership, community involvement, choice and control. The services provided range from working with individuals, families and circles of support to establish PA requirements, deciding what the employment arrangements will be and what support is needed from Uemploy, advertising and staff matching from within existing PA contracts, shortlisting, interviewing, recruitment, to additional employment support to ensure staff continue learning and development, access their pension and follow health and safety requirements.

### Impact

Uemploy was established to provide support to people with a learning disability and their families to employ their own Personal Assistants (PA). Over the year, it has

become apparent that there is not currently a developed market for specialist provision of this nature solely relating to people with a learning disability. The company is not currently trading whilst its future is being assessed. To fill the gap that the service provided, Uemploy have researched and written a number of guides on getting a Direct Payment of people's care budget and designing, finding and employing PAs. The guides are free to download on [www.thera.co.uk/uemploy](http://www.thera.co.uk/uemploy).

### d. Housing Support

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

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 alongside people with a learning disability and their families. The goal of this service is to find suitable property for people who require alternative accommodation or are unhappy where they are living for a range of reasons, including accommodation no longer meeting their specific needs.

Having identified what the person wants and needs, Thera liaises with a range of housing providers, to find a suitable property in the right location and that can be adapted to meet each person's very specific needs. This may be through a Registered Housing provider such as Empower Housing or Progress Housing Group, with whom Thera has a strategic relationship or via Forward Housing, a Thera company.

### Forward Housing

Forward Housing was established as a charity in 1999 with a focus on housing for people in the Devon and Torbay area. In 2010, Forward Housing joined Thera Group and partnered Thera South West in the development of housing and living opportunities for people with complex needs as part of a transformation project to support people to move on from Residential Care to take up the opportunity of a tenancy (often referred to as 'Supported Living'). This gave people the opportunity

to have a home of their own and choice and control over the people they live with and the staff who support them. Forward Housing has since developed its activities across the UK and has significant expertise in finding and adapting property for people with complex support needs.

## Impact

People find somewhere to live; and have and maintain a home of their own which meets their needs and wishes	12 people moved into their own home this year as a result of housing brokerage support Forward Housing currently owns 17 homes and leases 26. This has enabled 52 tenancies, most of it in shared housing
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Thera supports people to enjoy a smooth move into their new home, by engaging with the individual themselves, their family, wider circle of support and paid staff on the location and specification for a property, timescales to achieve a house move and tracking and reporting progress on sourcing and developing the property. This year has seen the development of a range of Easy Read<sup>6</sup> planning tools to support this process.

As of March 2016, Forward Housing owned 17 properties and leased a further 26, enabling 52 tenancies to people with a learning disability. This has been made

possible thanks to off balance sheet property secured through the Cheyne Capital Social Property Impact Fund. Since joining Thera, Forward Housing has developed and grown, to offer its considerable expertise in developing and adapting accessible housing to more people with a learning disability and across England and Scotland:

- Responding to requests to source and purchase housing
- Providing advice and guidance on the adaptation of property
- Managing property improvements and adaptations

In addition to the work of the housing brokerage manager and Forward Housing, there are many great examples of Thera's staff supporting people to negotiate with landlords to refurbish kitchens and bathrooms, change room usage and have personal choice of redecoration organised through housing associations, people choosing their own decorator and engaging in DIY.



### Richard's new home

When Richard moved into his new home he invited all his co-tenants for tea the following weekend and made cake in preparation

<sup>6</sup> A recognised methodology to communicate in a way easily understood by people with a learning disability



## e. Employment, Training and Social Enterprise Programme

### *Service Goal: More people with a learning disability will have increased employment opportunities*

Thera staff act as supporters for people with a learning disability wanting paid employment. As part of their overall plan of support, Thera staff can help individuals find employment and support them to gain qualifications. The target outcome is to increase the number of people with a disability that enter and sustain quality employment, whether paid or unpaid. To achieve this outcome, Thera supports its beneficiaries with vocational profiling, employer engagement, job matching, in-work support and career development.

**The Camden Society** (part of Thera Group) is an established provider of social care for the London boroughs and Oxfordshire, and of employment and training opportunities for people with a learning disability living in the London boroughs. The Camden Society (TCS) runs a programme called Unity Works, which is delivered through the social enterprises Unity Kitchens and Mail Out. TCS' services include:

- Training programmes (including apprenticeships and accredited qualifications)
- Employability support, focusing on job search and CV development
- Employment Programmes – young people's employment support linked to college courses; direct employment support to those in employment, support for Access to Work applications and Welfare Benefits advice
- Employer engagement

#### **The Quality Company** - Providing employment for people with a learning disability

The Quality Company is a unique company that has grown and developed within Thera Group. The team employed by The Quality Company was started by Thera Trust's first Service Quality Director, who wanted, as the organisation grew and

developed, to have more people with a learning disability support him to assess the quality of support provided by Thera. The Quality Company offers, through its assessors with a learning disability and Quality Standards developed by and alongside people with a learning disability, a peer review quality assessment service that compliments the quantitative information that organisations use to monitor quality and compliance.

### Impact

People have improved work or business skills and confidence	53 people completed the Quids In course
People gain and sustain work	61 people with a learning disability have completed fixed term work placements. (part of training programmes, unpaid) - overall  90 people supported into paid work with 50% (to date) sustaining their jobs for over 6 months <sup>7</sup>
People gained accredited qualifications	A total of 125 people were enrolled in accredited qualification training, with a total of 84 completing the qualification. The remaining 41 are still working towards their qualification
People are job ready	51 people started voluntary work as a step towards employment
Employers actively support Thera employment programmes	63 employers are currently actively engaged with Thera's service

### Employer Engagement

The programme Unity Works has had a significant impact in increasing the number of people entering employment over the last year. One of the key factors involved

<sup>7</sup> 390 people enrolled on average in each month in Unity Works

has been The Camden Society's new model of employer engagement, whereby they have based staff within mainstream employment services such as Job Centre Plus and local authority employment and skills departments. This has resulted in 109 employers contacted, with 63 actively engaging with the service. Working in mainstream agencies has allowed The Camden Society access to larger employers and the use of already established contacts to promote employment for people with a learning disability.

There have been a range of opportunities secured with employers. 61 people with a learning disability have completed fixed term work placements. A number of these have led directly to employment, allowing people to demonstrate their skills in the work environment, rather than through traditional recruitment methods. The Camden Society have also supported 90 people into paid work with 50% (to date) sustaining their jobs for over 6 months.

### **Training**

The wider impact of The Camden Society's services has been increasing people's skills and confidence through the training programmes. These have included Quids In – A money management education programme, providing understanding and awareness of payslips, tax, national insurance and day to day budgeting; 53 people completed this course.

Unity Works Apprenticeship scheme continues to be in demand, with over 87 people applying for eight apprenticeships (in kitchen work, mailrooms and warehouses). During the 2015-16 intake more opportunity was offered through two new apprenticeships in the mailing and warehouse business. All eight apprentices are working towards the NVQ level 2 and are well on the way to achieving this qualification. They attend Westminster Kingsway College to achieve the functional skill part of the scheme. All of the 2014-15 cohort apprentices who graduated in August 2015 have secured employment in a range of careers. 12 Apprentices and 17 Trainees started a City and Guilds NVQ Diploma during 2015-16: 27 in Hospitality and two in Warehousing. 19 have completed and ten continue their training and assessment.

### **Employment Programmes**

Lambeth Pro Work (part of TCS's employment programme), which is based in Lambeth College, has been working in partnership with the customer service

department of Lambeth Council since 2013, which has been taking people with a learning disability on work placements for the last three years.

The college courses have two intakes per year in spring and autumn, with up to six students being offered placements at each time. All students have to complete an application and attend an interview to secure the placement. Council staff are provided with disability awareness training by past students with support from Pro Work staff and each student on placement is allocated a work place mentor. This has proved really successful for the Council; more staff have volunteered over the years to be mentors which in turn has resulted in an increase in the type and number of placements. Students complete a four week placement and they have clear job descriptions and develop skills and confidence in their roles. Students from the last intake have secured employment at TK Maxx and Iceland as customer assistants, at Fair Share doing data input and administration or have secured ongoing voluntary work within the council leading to paid employment as 'Digibuddies'.

### **Providing employment for people with a learning disability**

Throughout the year, The Quality Company has employed an increasing number of people with a learning disability to 31 as at 31<sup>st</sup> March 2016, each working an average of 9.2 hours per month. The role of the Quality Assessor requires the skill and willingness of the person to share their lived experience of learning disability with the support of their Quality Partner, to apply this in their assessment of the quality of support, to understand what good and bad support looks like and be able to express what they experience when visiting people with a learning disability who have formal care and support.

For many assessors, this is their first job and they are learning the responsibilities required for holding a job and meeting deadlines. The Quality Partner role is a challenging role to fill and The Quality Company has, at times, had to supplement support to assessors with time from the Operational Manager.

2015/16 has seen a review of the structure of the teams, to support and enable better co-ordination and planning of quality assessments and supervision of the teams – which offers career progression for those in partner roles; as well as to



include a senior assessor role that not only provides mentoring by an experienced quality assessor to other assessors, but offers career progression within The Quality Company.

All of the staff have completed their induction training. There is a challenge in offering on-going learning and development for staff in a way that is accessible and feels relevant. The Quality Company therefore offers a set of accessible learning modules that the Quality Assessor (post held by a person with a learning disability) and the Quality Supporter (person employed to assist the assessor) work through together.

## f. Supporting Social Entrepreneurs

*Service Goal: People with a learning difficulty will have increased confidence setting up their own business or community project*

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. It supports entrepreneurs with a learning disability by providing knowledge and experience through workshops and the 'prize' of 1:1 mentoring.

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 the mentor is to support the participants to make their idea a reality.



*"I decided to take part in the Dolphins' Den project to get my jewellery business up and running. I found the Dolphins' Den workshops helpful and interesting to go to. They helped me bring my idea to life!" Fiona.*

## Impact

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

3 people (out of 90) are now running their own enterprises or community groups as a result of Dolphin's Den

People feel empowered and self-confident as a result of their participation on Dolphin's Den

90 people participated in Dolphin Den, running a total of 4 projects  
52% of participants gained business knowledge as a result of Dolphin's Den  
32% of participants learned about setting up community project as a result of Dolphin's  
69% of participants gained work skills as a result of Dolphin's Den  
46% of participants developed friendships as a result of Dolphins Den

The types of projects set up include dog walking, a community choir, an advocacy group, and a jewellery business.

2015/16 has seen a pause in delivering Dolphins' Den workshops to consider the recommendations from the final evaluation. This has enabled the project team to seek additional funding streams for Dolphins' Den and put together as part of a consortium, a European funding bid, to hold six Dolphins' Den projects over three years.

## g. Promoting People's Place in Society

*Service goal: Thera will demonstrate that people with a learning disability can be leaders in society*

Thera aims to embody the change they want to see in society and lead by example. To promote the place of people with a learning disability, the organisation employs individuals with a learning disability as paid directors and in other senior positions, has voluntary directors with a lived experience of learning disability and generally employ people with a learning disability in a range of roles. In addition, to enable people to have control of the company that supports them, Thera is building a Company Membership structure to include people supported by the company.

## Impact

There is an increased number of leaders and staff in Thera Group	13 positions now exist for Service Quality Directors and other leaders with a learning disability
There is an increased number of people with a learning disability controlling their local Thera company	61 people with a learning disability are supported company members 7 companies implementing company membership

13 paid people with a learning disability have a position of leadership within the Group. An important role is the role of Service Quality Director (SQD), which is held by someone with a learning disability. This is a paid Executive Director position, which sits alongside the Managing Director in each of the regional subsidiary companies that provide direct care and support. There are currently nine directors with a lived experience of learning disability and an additional two open vacancies in The Quality Company and the Camden Society. There are also a number of Non-Executive Director opportunities available.

Sam moved from being a voluntary director on the company's board to being a paid Service Quality Director for Thera South West earlier this year.

*"I had never had a paid job and it was my ambition to obtain one. Obviously the SQD role was an ideal route to pursue. I have been able to use my previous experience to the full and am really enjoying the opportunity to improve the support Thera provides. Both as a Non-Executive Director and subsequently as Service Quality Director, I have been able to offer insight and understanding to Board members on issues around disability. This personal experience of disability is invaluable to fellow members of the Board."*

The SQD role is unique to Thera. As a paid Executive Director, they monitor the quality of support to people. This is both directly through visits and also by monitoring and responding to complaints, and by commissioning The Quality Company to carry out quality assessments. SQDs are mentored and coached by the Directors of Quality and Involvement.

With this leadership, there is an enthusiasm to implement Company Membership, offering people with a learning disability the opportunity to be in control of the company that supports them. The year began with two companies with full company membership rising to seven by end of March 16, with 31 Supported Members (people with a learning disability supported by Thera companies) rising to 61 by end of March 16.

## h. Community Capacity Building

*Service goal: People with a learning disability who have formal care and support will have broader social networks, where identified as a need in their person centred support plans.*

**TEN** - This project, made up of Thera, Equal Futures and Neighbourhood Networks, focuses on building and maintaining lifelong circles of support and peer support around a person who in the main has paid formal support in their lives. This can be drawn from existing connections in people's lives including family, friends, neighbours and other people who have support and for many, it is building and strengthening the individual's social networks, support and involvement socially and in the community.

**Equal Futures**, a family led organisation, builds circles of support for family members. Equal Futures was set up in 2002 to ensure that relatives who have a learning disability have enduring informal support around them, now and beyond the life of their parents. Equal Futures joined Thera Group in January 2015.

*Service Goal: Families will have the tools to develop their future plans for their relative with a learning disability and build circles of support beyond their (the parents) lives*

**Safe and Secure (England)** is a guide and toolkit which was published and first distributed in October 2015. 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. The purpose of the book is to:

- Inspire families to face their fears and plan for the future of their relative when they are no longer around
- Help families to be sure that their wishes, dreams and desires for their relative can help shape their future



**Liam** has really hit the ground running since he began his involvement with Equal Futures. He learned about the work Equal Futures does at one of its workshops, and he was keen to have his own Circle. Liam lives in Glasgow, and was the first member to successfully broker part of his support package to cover the cost of his Community Connector (the person employed by Equal Futures to develop and support Liam's circle through Self Directed Support). He co-facilitates workshops, where the audience really appreciate listening to how he manages his life. Liam has been co-editing Equal Futures' newsletter since last summer. Towards the end of last year, he joined the Equal Futures Board.

- Guide families through the process of making sure that their relative will always have people around them that know and care about them
- Help families to make a plan for their relative's legal and financial security, along with practical tips about how to put these into place

## Impact

People supported through TEN (Thera, Equal Futures, Neighbourhood Networks) approach to increase their independence and reduce their reliance on paid staff	1 circle and 1 network supported by all three organisations
Family take the opportunity to plan with their child, a well-supported future beyond the life of their parents	654 Safe and Secure books distributed to date.

## Equal Futures

Equal Futures currently has successfully established 25 circles of support, made up of friends, family and people introduced through an Equality Future's community connectors - a person from the family's local community who works closely with the person with a learning disability (Focus Person) and their family to get to know them and support them to build a circle, using their community connections. The community connector remains involved until the circle becomes self-sustaining.

In addition to working on a small fixed term project with four people living in a residential facility, this year, Equal Futures have developed six new Circles, where they currently have a presence – Ayr, Glasgow, Scottish Borders, Edinburgh, Midlothian and Perth.

## TEN project

Thera, Equal Futures and Neighbourhood Networks form TEN to work with people to whom Thera (Scotland) provides intensive 24 hour support. The majority have a history of long term institutional care. Following initial scoping and planning work between the three organisations, TEN recruited a project co-ordinator and started work in October 2015.

## Safe and Secure

Safe and Secure (England): Six steps on the path to a good life for people with a learning disability (Al Etmanski with Jack Collins and Vickie Cammack, English contribution by Denis Rowley, Thera Trust), was published to provide a guide to families to plan for their sons or daughters who have a learning disability, to have a good life now and beyond the life of their parents, this includes building a range of practical advice and exercises that can be dipped into or delivered as workshops”.

654 Safe and Secure books have been distributed to date. Thera has now developed an approach to distribute this to more families around the country. To date, Thera has run successful events in Gloucestershire and Hereford. The events help families think about their vision (what to put in their plans), how to create circles of support and it also touches on the technical aspects of Wills, Trusts and Estate Planning to help their relatives achieve longer term financial security. The aim is to create an environment where families feel comfortable to talk about future planning for their relative.

There are plans to hold further events next year.



*Matthew with the Safe and Secure Book*

## 2. Plans for Next Year – Impact Growth

- Thera will continue to carry out its core business of supporting people with a learning disability in their day to day lives and will support more people with a learning disability as a result both of the bond finance and the agreement with Cheyne Capital. The ability to make property available through these two routes will be a key driver of organisational growth
- In addition to the quality monitoring of all the support provided by Thera, there will be a continued focus on the quality of support to people with complex behavioural support needs
- Thera will continue to work with people and their circles of support to enable people with a learning disability to have housing that meets their needs and is part of the community in which they choose to live
- Thera will continue to deliver and grow its employment and training services to people through opportunities in the Camden Society Unityworks programme and with other employers and develop similar expertise and programmes elsewhere in the Group
- Thera will continue to support The Quality Company to enable the development of their teams, embedding the new first line management and role modelling structure and supporting teams to assess against the newly revised quality indicators
- Thera will continue to develop and improve its impact measurement approach and processes.
  - o It will develop a better understanding of the impact of Dosh's work, notably through a customer satisfaction survey
- o For discrete projects such as Dolphin's Den, Safe and Secure and TEN, Thera will better measure satisfaction and improvements confidence and wellbeing
- Thera is dedicated to continue its work to develop career opportunities for leaders with a learning disability and further implement and embed Company Membership across Thera Group