



Supporting people with a learning disability



Annual Social Impact Report
2018 - 2019



INVESTING FOR GOOD

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Social Impact and Financial Confidence Scores

By Investing for Good



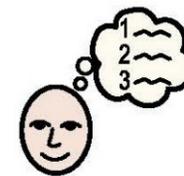
context

Context

The results presented in this Impact report are based on the data collected and provided by Thera. Investing for Good independently evaluates Thera’s social impact and financial performance, awarding a score on both aspects.

This is the fourth year that we have conducted this analysis, originally within the context of the Thera Trust Charity Bond issued in April 2015, which has since been repaid, and now in a broader context.

Thera continues to be a leader in social investment and has a range of socially motivated funders who are interested not only in the organisation’s ongoing ability to service borrowings but also in Thera’s social impact.



method

Methodology

Ratings are assigned based on an assessment of over 200 impact and financial criteria. The Social Impact Rating, determined through the application of ‘The Good Analyst’ methodology, aims to share our findings with investors and to communicate our assessment of the quality of Thera’s impact processes and ability to capture and improve their impact.

Social Impact

Social Impact reflects both the investment's capacity to generate positive social impact, and Thera's capacity to measure and report on its impact. It is based on a weighted assessment of: evidence of mission fulfilment, stakeholder integration, depth of change, breadth of change and impact management practices.

Financial Confidence

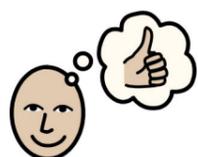
Financial Confidence is a measure of financial confidence in the underlying organisation. The confidence rating is not a snapshot of current financial performance, nor a relative measure to a previous financial year. It uses historic data to reflect the long term outlook for the organisation. It is based on a weighted assessment of: size, structure, development, operational performance, governance and specific risk factors.



results

Results

Thera scored the highest ratings for both Social Impact and Financial Confidence (Thera was awarded the maximum score of 1 on a scale of 1 to 3).



impact

Social Impact Rating Rationale

Thera is an organisation with a strong track record of high quality service delivery both for, and with, people with a learning disability across the UK. Thera has demonstrated its strengths in people-centred services, forging opportunities for beneficiaries to have their say in decisions affecting their lives. Thera has 13 paid leaders with a lived experience of learning disability, who are leading and shaping the direction of the organisation. Thera also works closely with beneficiaries to design the support they need around their chosen life goals.

Thera's impact strategy is clearly articulated with a clear and logical theory of change covering its six broad outcome areas. Thera continues to demonstrate strong impact in the areas making up its holistic people-centred approach: leadership, financial wellbeing, access to housing, personal and social well-being, social and community networks, and enabling access to employment and training programmes.



finance

Financial Confidence Rating Rationale

Thera has been awarded a score of 1, the highest Financial Confidence rating. Thera reports improved income levels this year and an eighth consecutive year of revenue surplus. The original bond covenants were again met by a significantly margin. In April 2018 Thera successfully redeemed their first charity bond, putting the organisation among a small number that have successfully exited a social investment in the UK.

Thera continues to improve its level of unrestricted funds and asset position, whilst embedding previous acquisitions into the organisation. Whilst we also note that Thera is reporting labour market costs weighing on financial performance in 2019-20 and the funding environment remains constrained, Thera is well positioned to face any future challenges from its strong financial position.



Thera continues to receive the highest rating in both areas.

Foreword and Executive Summary



summary

Year 4 of our Social Impact Report has again highlighted the dedication and enthusiasm of our leaders and teams.

We have reviewed and slightly amended our Theory of Change, remaining ambitious about measuring and reporting on our impact in the day-to-day lives of people with a learning disability in addition to some more easily measured project activity.

This report tells you of the challenges and our learning as well as celebrating our impact over 7 key areas of activity.

Jenny Garrigan

Director, Thera Trust

Social Mission



mission

Our social mission remains strong:

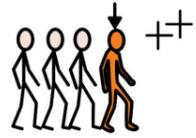
To work closely with and for people with a learning disability to empower them and support them to lead full, productive lives, and support them to have control over their own life.

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.



Theory of Change



Input

What we do

What we aim to achieve

Our impact goal

Full and equal integration of people with a learning disability within the governance of Thera and its teams

- People with a learning disability are Company Members, Company Directors and employees in Thera

Demonstrate that people with a learning disability can be leaders in society

Individual direct care and support to people with a learning disability

- People have ambitious life goals
- People with complex needs have equality of service

Increase personal and social wellbeing of people with a learning disability

Bespoke housing solutions

- People find housing solutions meeting their complex needs

Improve access to housing

Financial advocacy

- People have choice and control over personal money

Increase financial wellbeing

Employment and training programmes

- People improve skills and confidence to set up a business/get a job
- People gain and sustain employment

Improve readiness and access to employment, training and business opportunities

Support to entrepreneurs

Community capacity building

- People reduce reliance on paid support
- People have greater social opportunities and develop friendships

Broaden community and social networks

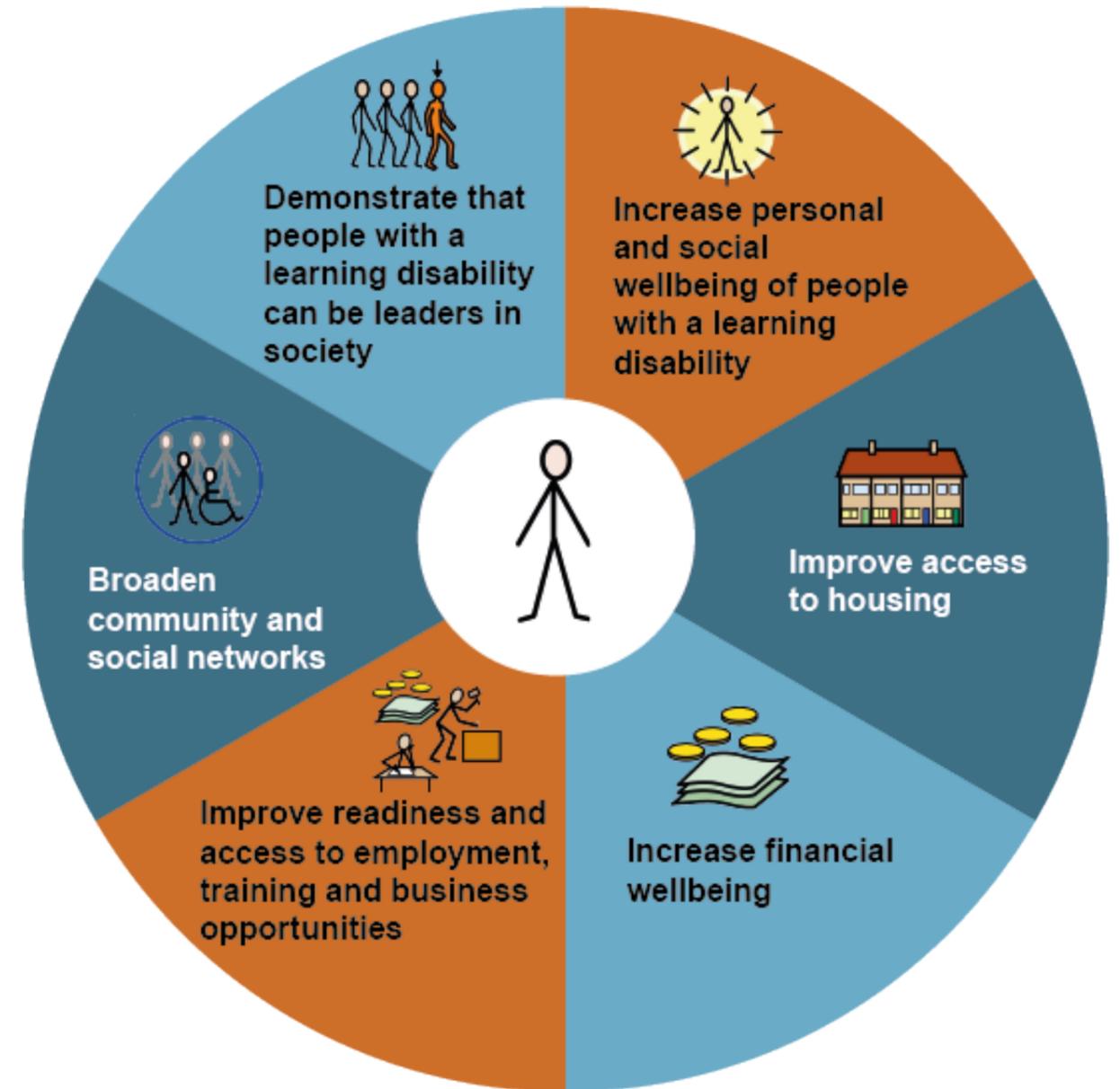
Motivated, well trained, experienced leaders and staff, who are experts in their field

Our Impact at a Glance



outcomes

Our Theory of Change (page 8) outlines the 7 areas of activity ranging from our day-to-day care and support, specialist activity and defined projects, supporting 6 broad outcomes. This report focusses on the reporting period April 2018 to March 2019.





People with a learning disability can be leaders in society

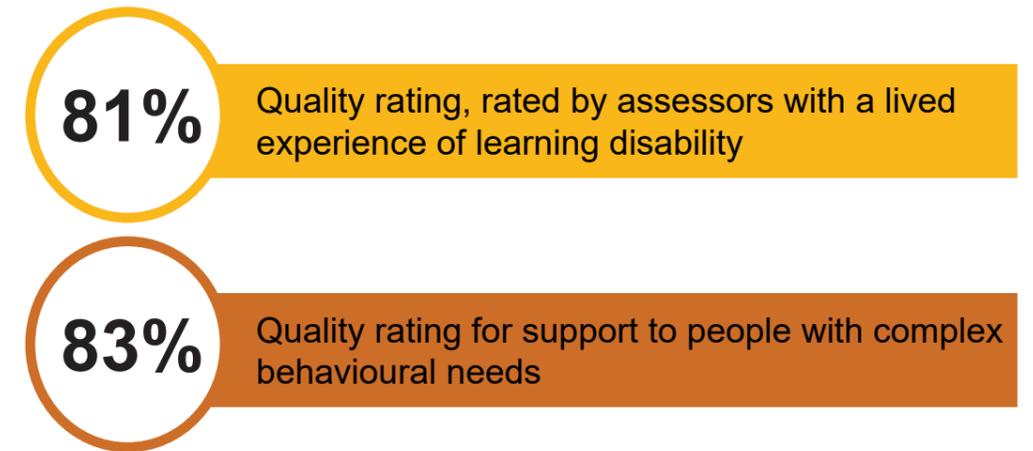


Increase social and personal wellbeing of people with a learning disability

Sample study of **1,255** of **3,000** people supported. Within this sample:



housing



People with complex behavioural support needs have at least as good support from Thera as our broader population.

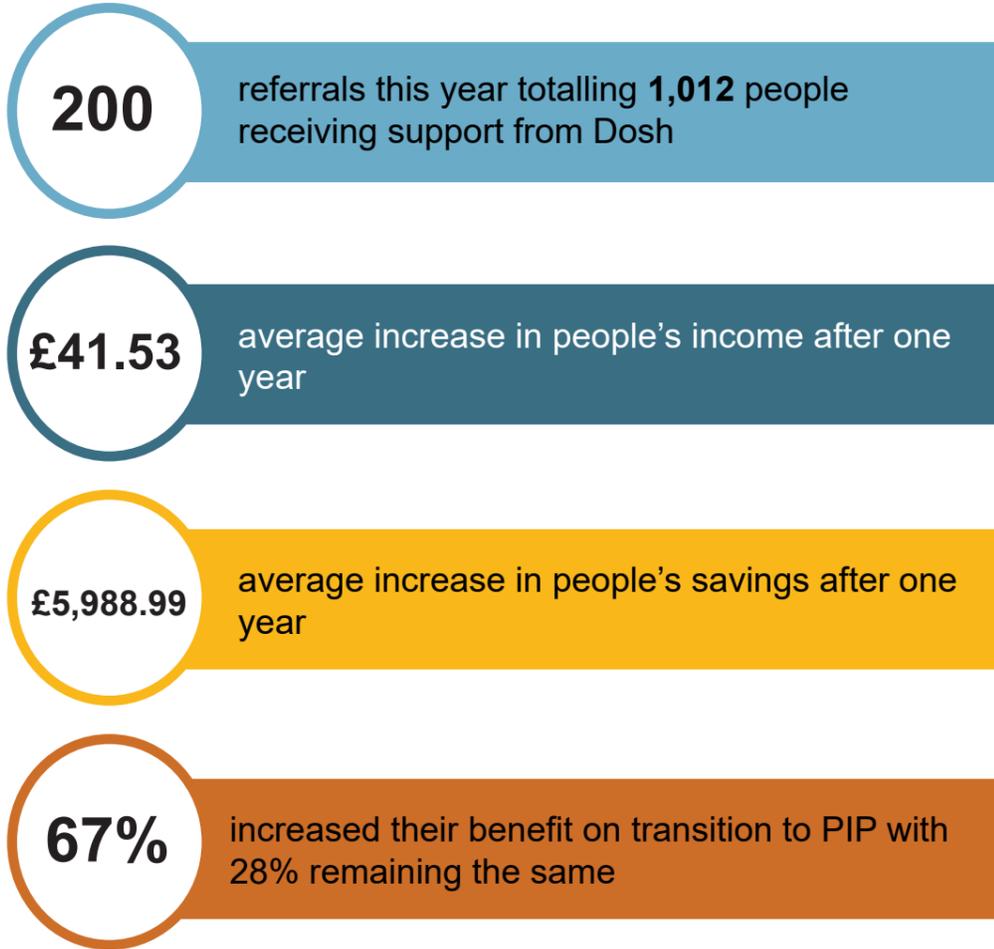
Improve access to housing





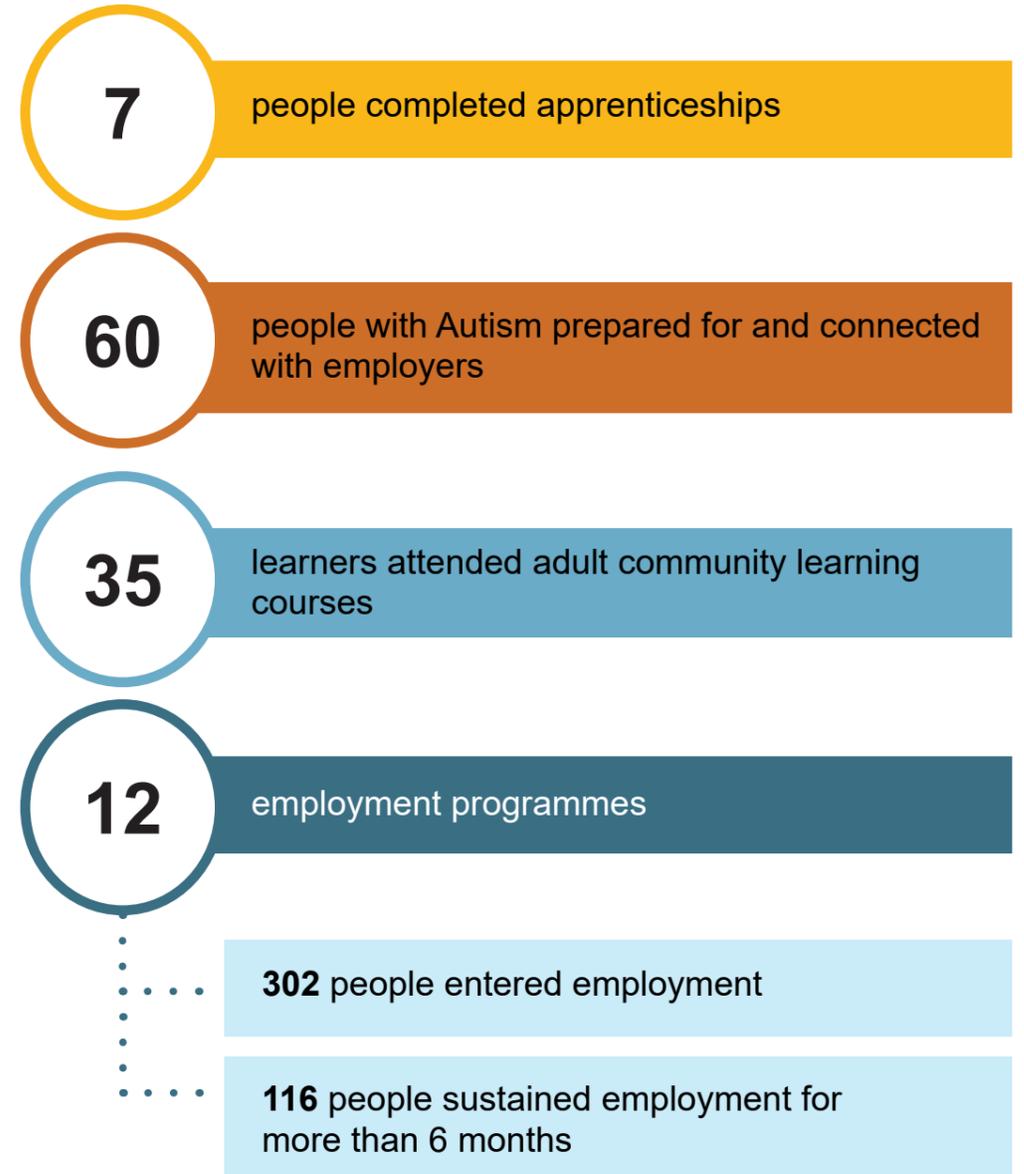
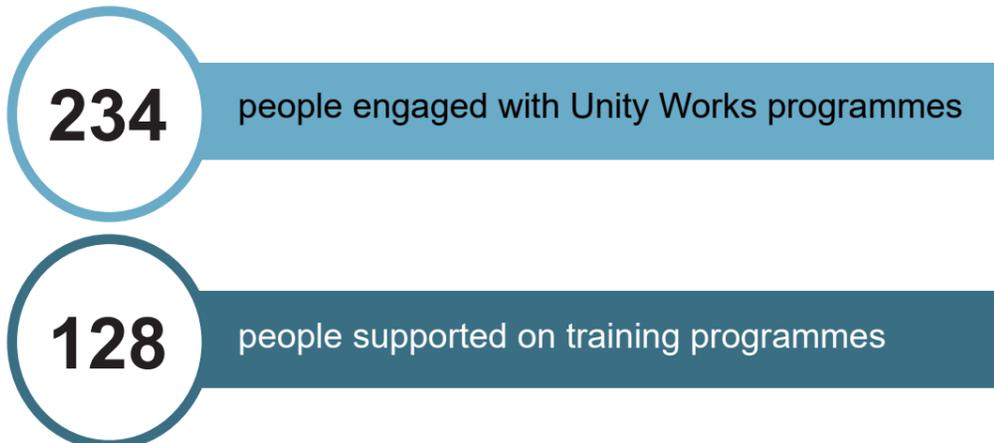
financial

Improve financial wellbeing



employment

Improve readiness and access to employment and training and business opportunities



A further **12** people supported to seek employment through a pilot in East Anglia.

29 people employed by The Quality Company – of 17 asked, **100%** report increased confidence in a range of areas of their lives and work. **88%** want to remain with the company whilst **12%** want to develop their careers elsewhere.

26 people to completed Dolphins' Den workshops plus additional 1:1 sessions, resulting in 9 enterprises being developed.



community

Broaden community and social networks

20

lifetime circles of support sustained

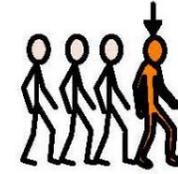
4

smart circles of support developed for school leavers to look at choices beyond school

30

pairs of Gig Buddies fully accessing gigs in Edinburgh and the Lothians, an increase of 5 pairs

Our Approach



leadership

Leadership by people with a learning disability

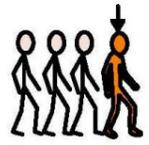
The key to our impact lies in the way we do things. As set out in our vision (see box on page 16), we want to lead by example to demonstrate that people with a learning disability can be leaders in society.

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 (and paid in other senior positions) throughout the organisation.

We have employed people with a learning disability in many roles, from the leadership by an equal executive team in Thera Trust, the parent company, which includes a shared role of Director 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 with a learning disability 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 appointing an Independent Director to the company board.

Thera's Vision



leadership

Leaders

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



control

Control

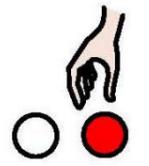
Thera will be controlled by people with a learning disability.



manage

Manage

People supported by Thera can say how their Thera company is directed and managed.



choice

Choice

People with a learning disability will design the support they want from Thera.



respect

Respect

Thera will respect the rights and wishes of people at home, at work and in the community.



quality

Quality

People with a learning disability will check the quality of support from their Thera company.



charity

Charity

Thera Group will be led by a charity.

Understanding and Measuring Impact



learning

Our impact journey and learning

This is our fourth Social Impact Report and we are continuing to learn how better to measure, manage and report our impact. We are aware that we are ambitious about the number of activities we are measuring and the nature of them – mainly non-project based, day-to-day support alongside people with a learning disability, in addition to our more focused activities such as housing, financial advocacy and employment support.

In reviewing our Theory of Change this year, we have decided to make some minor amendments, to ensure that we continue to measure, manage and report our impact against our goals of improved personal and social well-being, access to housing and broader community and social networks, alongside pushing forward with increasing people's financial well-being and employment and training opportunities. Whilst monitoring and measuring social well-being remains the biggest challenge, it is at the core of what we do and therefore key to ensuring testing and continuous quality improvement.

This continued impact management journey has encouraged our local subsidiary boards to think about their planning of impact more broadly, beyond what we do directly and in relation to the communities within which we work and how we can support these communities to better support people with a learning disability.



data

Data collection and measurement

As a provider of regulated care activity, support and services to and with people who have a learning disability, we collect a range of data around the work that we do. We continue to strive to harness it better to inform our activities and management decisions.

We are sensitive to the very personal nature of what we do but are keen to ensure that we can measure our input, output and impact to inform continuous improvement, management decisions and increasingly our strategic and annual planning.

The corner stone of the work we do with individuals is through person-centred planning and we continue to utilise the on-line planning tool iPlanit. In addition to the interactive nature of this tool having the potential to enhance the experience of planning by people themselves, the tool provides a range of qualitative and quantitative data from which we can monitor the effectiveness of our input with each and every person we support.

This year we have better utilised a story-telling approach through case studies to both check the validity of our quantitative data and to give real-life perspectives of the work we do and its impact.

Last year, we highlighted the need to improve our data collection tools fully to capture our performance and impact. We continue on this journey and whilst we haven't as yet benefitted from the outturn of this work, a clear IT strategy has been developed around four themes:

- Great IT support, guidance and management
- Expand and transform business systems, process and infrastructure
- Tailored services to meet individual need
- Transform our information management capability

Inclusive planning work has been carried out this year to ensure that we build information around the person rather than by contract, forming the basis of expanding and transforming our systems and processes in line with Thera's Vision.

A pilot is taking place later in 2019 to test mobile technology to support the day-to-day work of our teams.



reporting

Reporting

When we first started writing our impact report back in 2015, our focus was to report to our investors in Thera Trust's Social Bond. Whilst we are keen to continue this, our impact management journey has encouraged us to incorporate impact reporting into everything that we do.

This report is a celebration of the achievements of the people we support and their teams whilst offering an opportunity to step back and scrutinise our impact on an annual basis.



impact

Impact management

Leaders and boards continue to simply ask the question:

“How do we know we are doing a good job?”

This guides our culture of impact management informing decision making and our annual and strategic planning.



questions

Key questions which we aim to answer in this report:

- **What difference did we make in the lives of people with a learning disability?**
- **Can we evidence that we had an impact and what does the information tell us?**
- **What do people with a learning disability and others tell us about the support we provide?**



impact

What impact do we measure?

Thera's focus is to ensure that people are supported to live the lives they choose and are not judged by others on how fast they themselves progress in their lives.

Therefore, rather than measuring directly whether people with a learning disability are achieving their goals and aspirations, we have chosen to focus on measuring whether they are supported and enabled in the right way, to recognise and maximise their opportunities.

This approach is to ensure that we are measuring solely our impact on the lives of the people with a learning disability.



impact

How do we measure it?

Data is collected from a range of sources:

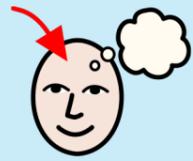
Quantitative

- **Regular reporting – monthly/quarterly:** as appropriate, from operational teams covering staff input, key outputs such as person specific plans developed, activities undertaken and performance against key plans and indicators
- **Operational audit and exceptional reports, from support teams and managers:** The Quality Company's Quality assessment data measured against Thera's quality standards
- **Data provided through analysis by experts such as Thera's behavioural specialists.**
- **Data available through contracts monitoring, HR and finance systems.**

Qualitative

- **Bi-monthly Service Quality Director reports.**
- **Quality surveys** of family carers from The Quality Company and Quality Assessments reports carried out by our Assessors with a learning disability - measured against Thera's quality standards.
- **Annual Customer Satisfaction surveys** by Dosh Manager - measured against the Dosh Promise and key indicators.
- **Project specific surveys** e.g. Dolphins' Den workshop delivery, through a mix of adapted wellbeing survey (Warwick-Edinburgh Mental Well-being Scale) and key project indicators and impact of working for the Quality Company.
- **Testimonials as they arise or requested.**
- **Case studies** delivered through support staff working alongside individuals with a learning disability to tell their story.

Our Impact



learning

People with a learning disability can be leaders in society

The embodiment of Thera's Vision is the equal leadership team in Thera Trust, the charity and parent company, which includes a paid director with a learning disability and the employment of leaders with a learning disability as part of the executive team in each of the subsidiary companies that provide direct care and support to people with a learning disability – Service Quality Director posts.

This role is key to Thera to ensure that the quality of support is monitored and reported at board level by someone with a lived experience of learning disability.



employment

Sustained employment

We have 13 leaders with a lived experience of learning disability, representing 40% of our paid Executive Director roles. All of our leaders are experienced in their roles with a range of service from two to twelve years.

Having leaders with a lived experience of learning disability ensures that we behave and communicate in a way that is inclusive of the people we support and gives transparency of information and decision making.



impact

There are numerous examples of the direct impact these leaders are having on the lives of people with a learning disability both those Thera supports and others:

- **Challenging the norm** – taking this theme on every visit to monitor the quality of support, seeking to challenge staff practice and raising awareness of approaches through fresh eyes and own experiences.
- **Leading a range of groups and committees across Thera** to ensure that plans and decisions are made alongside people with a learning disability.
- **Training other leaders with a lived experience and people supported by Thera**, to deliver staff induction training.
- **Developing and making employment support materials** available to people with a learning disability.
- **Working with Heritage Ability to improve accessibility** of heritage destinations across the South West of England.

Many of our directors were nominated for the Learning Disability and Autism Leaders list 2018. We were delighted when Andrew Bright, Service Quality Director, Thera North and Head of Development, Thera Trust, was listed as one of twelve winners in the Work and Education category.





We are aware that many of our leaders, who bring their lived experience of learning disability to the role, have been with Thera for over 10 years. We have an internal mentoring arrangement through Thera Trust Directors of Quality and Involvement (one of whom themselves brings this lived experience) but want to stimulate a broader network of support and coaching.

To that end we have been working with the Chairs of the subsidiary companies to develop their skills in this area. We have also attracted the offer of a professional senior coach and mentor to support Helena Frewin, Service Quality Director, Thera East Midlands.

“I have had 4 sessions so far with an external mentor and have found them to be really useful because they have given me an opportunity to talk through various scenarios of different and/or difficult work situations and view each one more objectively and less personally or emotionally.

They are also helping me by giving me a greater understanding of different ways of resolving situations whilst considering the perspectives of others. I feel more confident to ask for help and not so inclined to feel that I have to do things on my own. This is helping me to consider the best ways of how and when to react if situations do arise.

These sessions have enabled me to develop methods of viewing situations from a range of viewpoints and have given me a clearer understanding and ability to analyse the circumstances so I can be aware of what the outcome is that I am looking for when I do ask for help.

I see my job role in a different light because I am more aware of the range and types of influences that I have as a director on others. This then has an impact on how others see me and the way I see my contribution to the company.

These sessions have developed a more realistic self-awareness and knowledge of how my contributions at board level can impact the lives of the people we support.”

Helena, June 2019



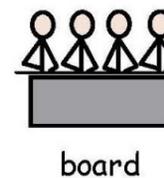
Over the coming year we aim to put together a plan to facilitate the recording of our learning and experience of support to leaders with a lived experience of learning disability, to ensure we can use this knowledge throughout Thera into the future, to encourage external input to our leaders and to also support the development of leadership roles in other organisations.

Our budding leaders

The Quality Company is a member of the Association of Quality Checkers; a not-for-profit membership association for organisations that provide quality checking services.

This year our Lead Director from the Quality Company, alongside one of our Senior Quality Assessors who has a lived experience of learning disability, became Non-Executive Directors on the Association of Quality Checkers Board.

This opportunity will enable The Quality Company to influence the world of peer quality checking.



Non-Executive Directors with a lived experience of learning disability

Having increased the number by 2 last year, we have **sustained 7 voluntary directors with a learning disability** – covering **64% of our boards**. We will continue to seek more across Thera Group. This enhances the knowledge on the boards, provides real challenge and support to the Service Quality Director.



Company Membership

Company membership is in place to ensure that, alongside staff and family carers, people with a learning disability (Supported Company Members) are in control of Thera company. Company boards are accountable to their members.

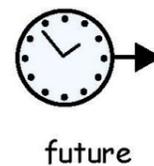
As planned, led by a small group of Service Quality Directors, one of their Executive Assistants and a voluntary director with a lived experience of learning disability took part in a train-the-trainers session on the use of person centred tools and exercises for them to use on staff induction sessions and Company Membership events to raise awareness of inclusion and membership.

The Annual General Meetings (AGM) of members have been a great success this year. Last year we reported that whilst the majority were well attended, two had to be rescheduled. This year, having raised awareness again amongst our staff teams and with improved communication about the event, all were quorate and well attended.

All companies are working on increasing their membership in the coming year. **There are currently 100 Company Members active across Thera Group.** Some Service Quality Directors are building up their contacts with potential company members by meeting people at existing events and social gatherings, talking to people 1:1 and others by creating a specific event to attract members. It is evident that when the first small number of company members are in place and they appoint an Independent Director to the company board, that director drives the membership forward.

The Membership Committee, chaired by Matthew Smith, Director of Quality and Involvement and leader with a lived experience of learning disability, completed at the end of this year, a review of all of the information on company membership. It is hoped that this will support the attraction of more members.

One of the challenges quoted by a Service Quality Director is that it is difficult to help people see the benefits of being a Company Member. Thera North tackled this in their own creative way!



future

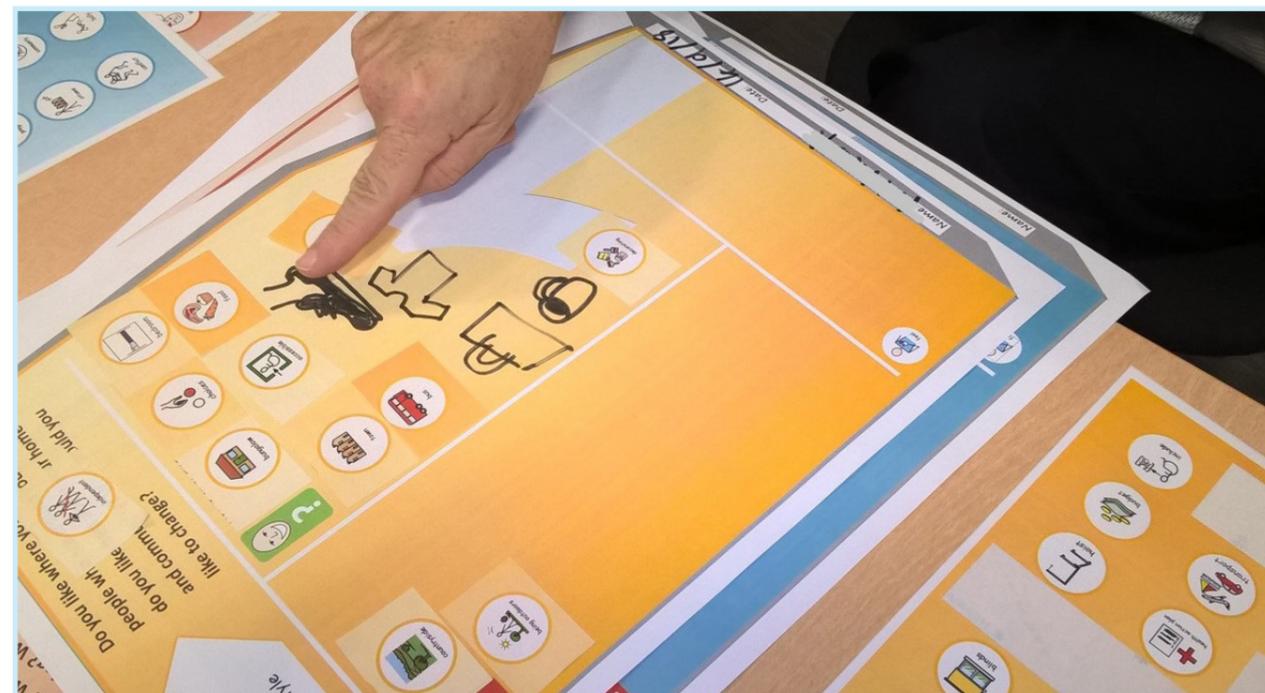
Making company membership real

To make company membership more meaningful for people supported by Thera North, we ran 3 regional 'Our Futures Days'.

They were interactive, graphic-facilitated workshops using person centred planning activities to find out what people liked and disliked and wanted to do. They supported people to think about their goals, dreams and aspirations for the future and the things they could be supported to do now that would move towards these goals.

As a result, people who we support expressed wishes from buying more shoes to going abroad on holiday. From a business planning perspective, it also became clear that there were themes around what people wanted for their future. We then used this information to set Thera North's business planning goals which have now been put into our company business plan. Themes included:

- **More adventurous holidays**
- **More access to activities within the community**
- **Opportunities to work or volunteer**
- **Development of social enterprises if suitable opportunities cannot be developed within community activities**





By doing this we hope to make company membership and getting involved much more meaningful for people. At our next Annual General Meeting we will be able to support company members to refer back to the 'Our Futures Days' and see how their input has steered the way their company develops.

On a personal level people have already started to see the aspirations they spoke about become real:

- M is developing a collection of funky footwear
- J has the gigantic TV of his dreams
- S has joined a slimming group and has won slimmer of the month
- B is training to be a volunteer at a heritage railway
- B is going to start volunteering at an animal shelter
- Several people who have been sharing houses are now looking to move into a place of their own

We are now planning follow up community mapping days, where staff and people they support will work together to find out what opportunities and possibilities are available in their area.

We will use this opportunity to use newly developed accessible information about company membership to encourage new members to join.



aspirations



well-being

Increase personal and social wellbeing

Thera supports people with a learning disability to have an ordinary life, maximising their opportunities and supporting them to reach their own personal goals and ambitions. As stated in previous impact reports, 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 begun.

Thera teams provide a range of support for people to have a good life at home, in their local community and for work and leisure.

We remain strong in our intention 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.



impact

Our impact

Flowing from our overarching leadership approach, our impact measurement starts with individual direct care and support alongside people with a learning disability, concentrating on the most vulnerable of those - people with complex behavioural support needs.

The remainder of our report looks at specific areas in which people with a learning disability find it particularly difficult to access i.e. appropriate housing, personal money management, employment and training and developing friendships and relationships.

Individual Direct Care and Support

The impact results presented here, in relation to direct care and support activity, are based on a follow-up carried out with **1,255 people out of a total of over 3,000**, who have received support in 2018.



support

Among them **714 people have been supported for more than 30 hours per week including 466 with complex behavioural support needs¹.**

Thera has continued to compare, against our general population, our impact results for our support to people with complex behavioural support needs², as it is nationally recognised that they are at greater risk of poor support³.

In this section of the report we have used The Quality Company quality standards numerical results, as reported by Assessors with a lived experience of learning disability and anonymised evidence from Person Centred Planning using the on-line tool iPlanit as a means of comparing results from last year and carrying out a comparison of support for people with complex behavioural support needs against that of Thera's wider population.

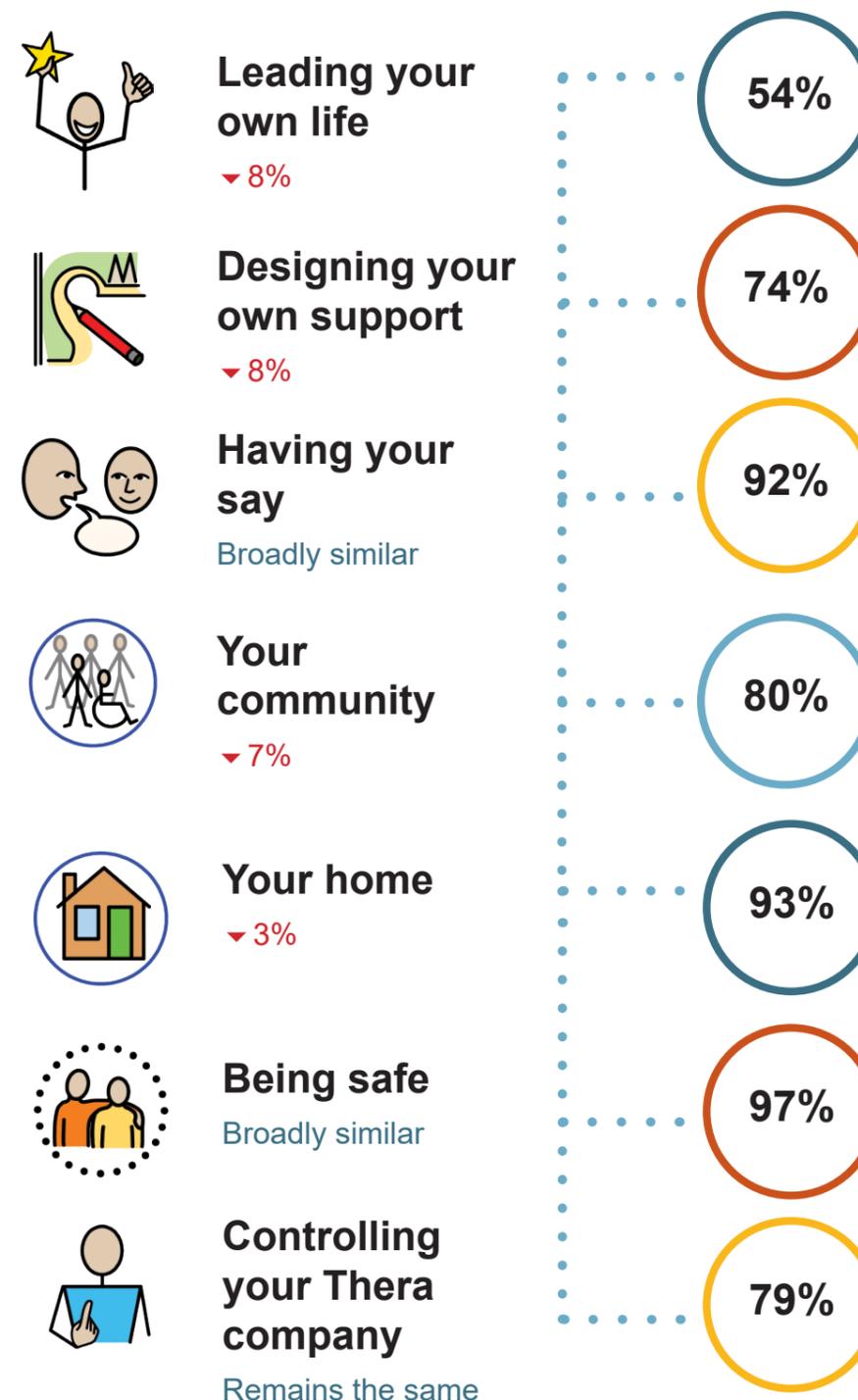
¹ As this is year 4 of a continuous framework, this number excludes care and support provided by The Camden Society, The Camden Society (London), Aspire and the specialist companies within Thera Group

² 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

³ Sources: 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



Overall quality rating, as determined by Assessors with a learning disability: **81%**



For people who have complex behavioural support needs, overall quality is assessed at **83%**



results

This year has seen a further reduction in results for the standards of 'leading your own life' and a reduction relating to 'designing your support' for both cohorts of people. This, on the surface is worrying; however from commentary on the quality reports and Service Quality Directors, it is clear that these areas score lower due to not having enough visible evidence.

This is due to the continued move to the on-line system and more people needing their own personal IT equipment more easily to share their plans with Quality Assessors should they choose (see Challenges on page 79). This assumption is borne out in the evidence from iPlanit itself, where people's live outcomes around lifestyle and independence are consistently the highest number of outcomes achieved.

We have seen a reduction in the 'community' quality standard by 7% for Thera's wider population and 6% for people with complex behavioural needs. The reason for this is not as yet clear and will be monitored closely through the coming year; however, it is noted that accessing and being part of people's community falls mid-range in the number of live outcomes achieved for the sample group of people recorded on iPlanit.

On analysis, iPlanit outcomes being worked on show a similar range of areas that are of importance to people who have complex behavioural needs, as those of our broader population:

- Feeling good about yourself
- I make decisions about my life
- Being active in my local community
- I try new things
- Communicating with people
- Being active
- Building relationships
- Doing more things for myself

Using the results from The Quality Assessments and iPlanit we can continue to evidence that **people with complex behavioural support needs have at least as good support from Thera as our broader population of people with a learning disability.**



housing

Improved access to housing

Forward Housing is part of the Thera Group of companies. Its purpose is to enable people who have a learning disability to live independently, either on their own or with friends, by delivering bespoke housing solutions..

We believe that each person has the ability to live independently with the right level of support, regardless of the complexity of their needs. Many of the people we provide accommodation for have complex support needs, such as physical disabilities or behavioural issues, each of which require a living environment that is tailored to meet their needs.

We work closely with people who have been identified by the Thera companies as being in need of accommodation and support. We deliver bespoke housing solutions for people who wish to be supported by Thera.

No two people are the same, so each development is designed to reflect people's individual needs, based on a robust assessment by a dedicated Thera staff team.

Whenever possible, we involve the individuals themselves, the people who know them best, such as family carers, as well as drawing upon professional input e.g. Occupational Therapy.

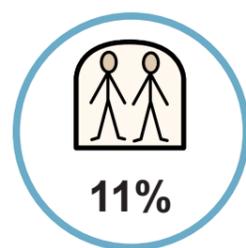
People are involved in the selection of properties, aids and adaptations etc. as well as in recruitment and training of their support teams.

Increasingly we are seeing an increase in the number of single people who require their own accommodation, due to the complexity of their needs.



outcomes

Of the people referred to us:



are currently living in some form of institutional care, either in a hospital or in residential care



are school leavers who want to live independently from their families, rather than return home



of people referred are still living at home with their families, but due to the parents' own declining health they need to move



are people living in accommodation that no longer meets their needs, usually due to age and related issues, such as declining health and/or mobility

Many of the people referred to us have complex physical disabilities and require major aids and adaptations to the property.

Many have complex behavioural issues which means they need to feel safe and fully in control of their environment, often therefore needing to live on their own, with support, and require a sensitively designed, low stimulus environment in a quiet location.



funding

High levels of staff support are required, with a minimum of one-to-one during the day, as well as night support.

Capital funding streams

Forward Housing have access to capital from Cheyne Capital, which funds the purchase, improvement works and associated on-costs of delivering accommodation, based on a purchase and lease-back model. The first tranche of £15m supported 102 people to move into new accommodation, following which an additional £12.5m was made available.

Forward Housing also has access to funds raised by our third Charity Bond and so far, has committed £2.6m capital.

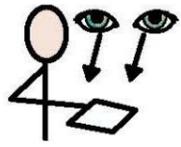


impact

Our impact

To test our assumptions on the impact of housing on the day to day lives of people who have complex behavioural support needs, Thera Trust studied a sample of **15 anonymised case studies** of people **supported by Thera teams from 3 Thera companies, covering 8 households**. People in the sample live in a mix of single and multiple occupancy households with a mix of people who had recently moved house and those who have lived in their current house long-term.

We were pleased to see an observable positive impact where property had been chosen and developed to meet people's specific needs. It is probable that a change in environment would have a positive effect on the staff working with people in their new homes, therefore it is recognised that the property itself, can't be seen as the only reason for positive change.



show

This small sample also showed, that, of the people who had moved to bespoke housing the reported rate of behavioural incidents had decreased (in one case, there was an initial increase, then a reduction to below the previously reported average).

Again we found that, for people who moved into smaller or single occupancy households, there was a reduction in behavioural incidents. This is thought to be as a result of each person having more control over their environment. It must be noted however that this could also be due to the design of the house and the location enabling better community access.

Key themes emerged from the studies:

- ✓ Consistent and well-trained staff teams are crucial to successful support, in particular in understanding people’s communication and function of any behaviour that may challenge themselves or others
- ✓ Partnership working with other professionals has provided better outcomes for people in relation to reduction in behaviour that challenges themselves and others
- ✓ People who have moved into housing where the location and environment has been considered and addressed to meet their specific needs appeared to have more control over their own environment, increased their activities at home and access to their local community, and, for the majority, there was a decrease in the number of reported behavioural incidents
- ✓ For one group, where people have moved from one large household to smaller households, there has been an increase in activity at home and more movement around their home, better access to the local community and reduction in reported behavioural incidents



medication

In addition, for some of the people in the studies there has been the opportunity to reduce the use of psychotropic medication. As part of the STOMPwLD⁴ initiative, we will be looking into this in more detail in the coming year.

In 2018-19 we provided **9 properties for 16 people** through the Cheyne fund and the third Charity Bond. Within this, we were also able to provide a bespoke housing solution for one individual with very complex needs. There are a number of new developments in the pipeline for 2019-20! We have provided housing for 102 people in total over the lifetime of this impact framework.

Providing the right living environment is a vital component when developing new support for people, along with having a staff team that has been trained to meet people’s specific needs.



story

We provided a two bedroom bungalow in 2016 for two men who had become friends whilst living in a long stay secure hospital. Both had been in some form of secure accommodation for approximately 15 years.

Having settled in and developed new interests and new circles of friends, they have each now chosen to move to separate self-contained, mainstream accommodation.

For one of the men, this will be the first in over fifteen years that he will not be required to have staff providing sleep-in support, a major achievement for him and a turning point in his life.

⁴ STOMP stands for stopping over medication of people with a learning disability, autism or both with psychotropic medicines. It is a national project involving many different organisations which are helping to stop the over use of these medicines. STOMP is about helping people to stay well and have a good quality of life. www.england.nhs.uk/learning-disabilities/improving-health/stomp/



challenge

We face a number of challenges in our work including:

- Increasing demand for bespoke, single person accommodation for people with very complex support needs in areas where this type of accommodation is at a premium. This makes it difficult to source affordable accommodation.
- Local Housing Benefit levels - in some such cases we have been able to use Bond funding, with a reduced internal rate of return, to deliver accommodation that would not have otherwise been affordable.
- Families often have high expectations of the location and value of property we can provide and we need to work closely with them to agree what is achievable. We involve parents in selecting properties so they can bring their knowledge of the local area and their son/daughter's specific needs.
- Increasing demand from commissioners to deliver larger developments and schemes which is contrary to Thera's policy on ensuring people live in small households that are a part of that local community.
- Time-scale pressures due to changed need, breakdown of current living arrangements or as part of a contract tendering process.

However, we take an individual, solutions based approach and are rewarded with many highlights. One of these is meeting the people who need accommodation, to drawing up a wish list of what they want and where.

For example, we met two older men who needed to move due to declining mobility, who were very specific about wanting to stay together and connections they wanted to maintain in the local area. In another instance, we worked closely with the parents to identify a property that was just over a mile from the family home, thereby enabling the whole family to continue to use the same shops, GP surgery, dentist and leisure facilities.



story

Amy⁵

Through childhood and growing up into early adulthood Amy was often excluded from services due to behavioural challenges.

As Amy grew up Grandma said that she would want Amy to move-on from the family home as she recognised that she could not sustain the role of carer indefinitely and did not want Amy to be in a position where any decisions about her future were made in an emergency.

Ansar and Forward Housing were approached in 2016.

Grandma was very involved in choosing the house for Amy. Once work was underway Amy became very involved. Visiting the house regularly, she developed a routine of having a drink of Ribena whilst she was there – this association with home remains today!

Amy moved in to her own home on 28th November 2016.

Amy has a consistent team around her, with new people slowly introduced as needed.

Amy now accesses her local community regularly and is making purchases at the local shop. She enjoys long country walks, giving her a true sense of independence. She also visits safari parks. Whilst enjoying the outdoors, she has a number of indoor activities too! - Rebound Therapy sessions which support Amy with her sensory awareness and she regularly goes swimming.

To help Amy try new things the team work through Social Stories⁶ to introduce her to new places and activities.

⁵ Name has been changed

⁶ "A Social Story accurately describes a context, skill, achievement or concept according to ten criteria Each story shares information in a format that is most likely to be understood by someone on the autism spectrum. Authors follow rules. It is only a social story if the final story has all the essential characteristics" www.autism.org.uk



story

Working closely with Speech and Language therapy, Amy's team encourage and engage her in conversation and storytelling in-line with her assessed level of language comprehension. Amy is responding well to instructions and new strategies are successively reducing a physically aggressive response.

Learning with Amy in her own home, the team feel that the next step is to have a more open-plan house to better meet her sensory needs and with the additional space to offer less disruption to Amy currently caused by her support staff being present in her lounge overnight. The team are working closely with Amy and her circle of support, including Grandma, who agree that, with careful preparation, a move would be a great success.

We work closely with a range of professionals in developing the right support strategies and approaches for Amy.

Following a recent visit the following email was received:

"I just wanted a catch up with regard to my observations of Amy yesterday. It was an absolute delight to see Amy in such good spirits, she was just so lovely, the staff supporting her were fabulous, their responses, putting Amy in the middle of everything, really lovely to see".

Community Nurse, Learning Disability Team



finance

Increase financial wellbeing

Dosh is part of the Thera Group and works within Thera's Vision. Dosh provides financial advocacy and appointee services to people with a learning disability.



celebrate

In September 2018, Dosh celebrated its 10th anniversary. To recognise this success, the Dosh team came together in the Grantham office to reflect on the story of Dosh.



promise

The Dosh Promise

We asked some of the people we support what they think about the support and information they get from Dosh and what we can do better in the future.

We used everyone's answers to write a list of standards called the Dosh Promise. This says how we will support each person we work with. We again used The Dosh Promise during 2018-19 to check that we are supporting people well.



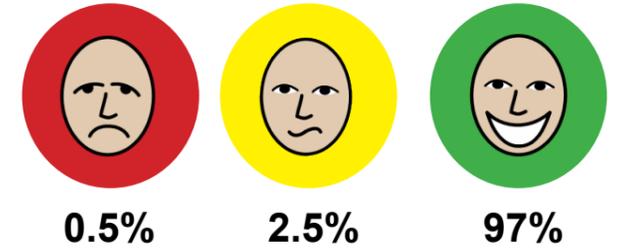
The Dosh promise

- ✓ 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 any questions I have
- ✓ Dosh will help me to keep my money safe

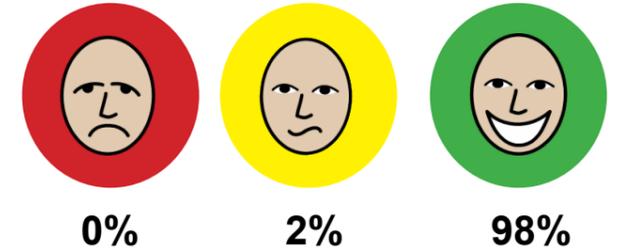


A snapshot from our Annual Review conducted during 2018 – 19 with the people we support:

Are you happy with your support from Dosh?



Can you choose how you spend your money to do the things you want?



Supporting more people

For the third year in a row Dosh received over 200 referrals. During this year we have worked with 191 support providers and 34 Local Authorities.

As of March 2019:

- ✓ **906** Individuals have a Financial Advocate
- ✓ **1963** Financial Advocate hours supplied
- ✓ **1012** Individuals receiving support from Dosh
- ✓ **1012** Individuals have an up to date personal financial plan (6 months)
- ✓ **906** Welfare Benefit assessments
- ✓ **9** Individual Service Funds managed
- ✓ **97** Circles Dosh is involved in re: direct payments
- ✓ **709** People supported externally by Dosh
- ✓ **310** People supported within Thera



story

Jason

Jason was finding managing his money hard and would often find himself without enough money to do what he wanted.

Jason's Financial Advocate helped Jason to look at where he was spending his money and discovered that Jason was paying a lot of bills that he didn't need to be.

Jason's Financial Advocate also noticed that it was taking a long time for bills to be paid meaning that Jason was being charged for being late and owing more money.

Jason's Financial Advocate helped Jason set up these bills as direct debits and cancelled the bills he didn't need.

This meant that Jason had more money, so he could go out and do the things that he enjoys.



impact

Our impact

We aim to have a louder voice as financial advocates to make a difference for people through innovative research and ambitious projects. This year we published research projects on: "mental health and learning disability support" and "safeguarding people we support"

Dosh delivered money awareness training as part of the 'Steps into Work' Transport for London (TfL) project).



funding

Your Money. Your Life

Dosh have also been awarded funding from the NatWest Skills and Opportunities Fund to run a series of money skills workshops for young people with a learning disability across the East of England.

We will aim to build the financial skills and knowledge of young people with a learning disability, as well as supporting them to become more confident around money. We will focus on building independent living skills, like budgeting, saving and paying bills, in a fun and friendly way, using accessible tools and games. We will also work with their families and carers on how to support them to manage their money independently.

We have funding for one year to offer 200 young people with a learning disability and their carers through a series of workshops on managing their money. They will all get free training, tools and information covering things like different ways to pay, keeping safe from fraud and mate crime, making spending decisions and getting the best deals.

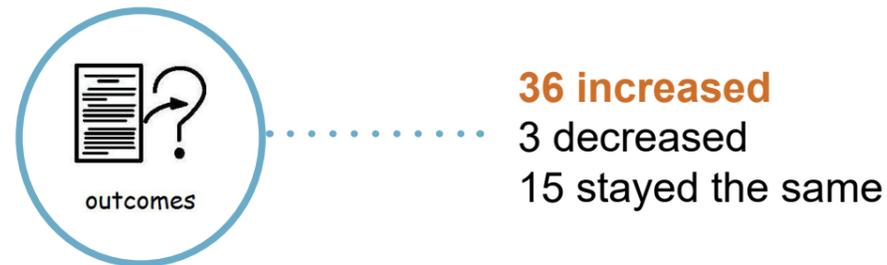


"Bob is an excellent advocate, knowledgeable, easy to contact. Responsive, effective communication"

"We like Sarah very much, she is always helpful, knowledgeable, easy/friendly to talk to. She always gets back to us when we have left her a message"

"Dube is good with talking both people through if they can afford things and on visits he asks them about future plans with their money"

As a result of our work with people, they have increased their personal income and savings:



Summary of income and savings outcomes for referrals made between April 2018 and October 2018:

	Average on referral	Average past 12 months	Total
income	£233.00	£274.53	£41.53
savings	£6,715.96	£12,704.95	£5,988.99



story

Joe

Joe has recently started being supported by our Advocate Sarah in Derbyshire. Joe owed £4000 to utility companies, he was sad about his debt.

Joe had been on the incorrect benefits; Sarah worked hard for Joe to be awarded an ESA back payment of £19,000. He is now on the correct benefits.

They decided that this money would be transferred into his Dosh bank account. His outstanding debts were cleared.

They spoke about what Joe would like to spend his money on. Joe has now booked his first holiday in over 5 years.

This will make a huge difference to Joe. His support team have said how cheerful and happy he is since being on the right benefits. Joe can now spend his money on things he enjoys.



Increase readiness and access to employment, training and business opportunities

Unity Works Social Enterprises

Unity Works provides skills, qualifications and job opportunities for people with a learning disability; alongside health and well-being programmes that enhance people's opportunity of finding work.

Following an intensive period of planning through 2018, Unity Works Social Enterprises - a subsidiary of Thera Trust - was developed out of The Camden Society.

This was to enable a clear focus on the different elements of activity that The Camden Society were undertaking and to enable a planned programme of work to share skills, knowledge and experience in employment and training to the benefit of people with a learning disability beyond the London Boroughs and across the UK.

234 people were engaged in Unity Works programmes overall.

This is a reduction from 308 last year as a result of a number of factors:

- People being reassessed for eligibility for social care and the rules changing to mean that people have lost training services.
- Increase in financial contribution to Local Authorities meaning some people choosing not to access services
- Closing of Café 311
- Better defined active candidates within our employment service

The Social Enterprises have supported **128 people on our training programme** over the year and **7 people completed the Apprenticeship programmes in August 2018** with another 6 starting September 2018.

Our cafes have trained people to become baristas, chefs and front of house staff whilst offering healthy, affordable food to local communities and workplaces.



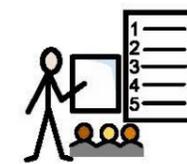
warehouse

Mail Out supports a range of public, private and social enterprise organisations to handle large mailings in order to train people for a career in warehousing and customer service. Mill Lane, a garden centre in West Hampstead, offers flexible training for people who enjoy horticulture or want to develop their careers in this sector.

In addition, we offer a wide range of adult community learning and health and well-being programmes. These support people to develop skills, build confidence, enhance independence and take part in their local community.

We have been successful in getting new commissioned services with The Department of Work and Pensions in Essex. The Autism Essex programme supported people on the autistic spectrum to develop their own vocational profiles, actions plans and connections with local employers. **Supporting upwards of 60 people across three sites in Chelmsford, Southend and Basildon**; sessions are co-designed with job seekers designing the sessions and giving feedback on training methods and action plans throughout the programme.

A total of **35 learners attended adult community learning courses** funded by Camden Council, including Cook Together, Eat Together, a healthy food preparation course and Digital World, a course that promotes online and social media safety. Funding for these well-attended courses has been confirmed for the 2019-20 academic year.



course

We developed new partnerships with University College London and London Metropolitan University as part of our volunteer programmes. Building on our volunteer week celebration event earlier in the year, **two volunteers from Ravensbourne University London produced our first volunteering film** which we are now using to promote our volunteer opportunities.

Our supported employment programmes offer a person centred approach focusing on people's individual skills, providing in-depth vocational profiles and matching individuals to roles with employers.



We have delivered **12 employment programmes** in 2018/19 with **302 entering paid employment** and **116 people having sustained employment for more than 6 months** in the life of this impact framework:

- WorkTrain Greenwich, Camden and Lambeth
- Autism Essex
- Supported Volunteering in Greenwich
- Young People Employment & Volunteering Programme Greenwich
- Waltham Forest Works
- ProWork Lambeth, Westminster Kingsway, City & Westminster Colleges
- Supporting Thera East to develop employment services and training models
- Deloitte Mentoring Scheme

One of our major challenges is short-term funding resulting in some programmes reducing their impact of supporting people into employment as people require a more sustained period of support to make the move towards the labour market.

However, our employer engagement team has built upon our 'Disability Confident Leader Status' to develop relationships with new employers and provide a bespoke service to them on accessible recruitment and promotion of a diverse workforce.



story

Ellie

Ellie started as a trainee at Platform One café and Unity Kitchen Tooley Street, progressing onto our apprentice programme. Ellie gained a NVQ level 2 and got a part time job in a high street restaurant.



In the last two months of her apprenticeship, the employment team worked with her to apply for her dream job at Peter Jones. She was able to demonstrate excellent customer service and barista skills, securing a permanent job within their café.



changes



closed

There have been a number of changes this year within our social enterprise cafes, with two closures and two new cafes opening:

- Timber Lodge café: The London Legacy Development Corporation released a tender following 5 years of trading. Unfortunately the terms and conditions, such as rent, were significantly increased and we decided the risk was too high for the organisation and we closed in January 2019
- Enfield Local Authority ended the block contract that provided the training income and the number of people eligible for training reduced therefore the café was no longer viable. Café 311 closed in February 2019.



open

... and opening!

- In early 2019, we opened a café in the newly built Westminster City Hall in Victoria. This was an exciting opportunity for us to partner with a council that places strong emphasis on social value. In addition to running the café, we will be working with Westminster's employment service to support people with a learning disability into work.
- Our second new cafe social enterprise opened in April 2019 at the Forum@Greenwich, a local community centre in Maze Hill. We are working with the Council's young person's services to set up training placements at the café.



workforce

The Quality Company

The Quality Company provides peer reviews of the quality of support to people with a learning disability. The Quality Company has successfully sustained a workforce of people with this lived experience, supported by partners with career experience.

Our workforce

The Quality Company **employed 29 people with a learning disability** at March 2019. This is an increase of 3 from last year.

Each Quality Assessor and Senior Quality Assessor works an average of 70.63 hours per year.

By reviewing our records it is possible to see that Quality Assessors have learning opportunities within their role. This is alongside regular supervision with their line manager and development plans relating to their role.

Impact of employment

Through 2018 The Quality Company undertook to assess what impact employment has on The Quality Company's Quality Assessors.



impact





impact

Key areas of impact

How does working for The Quality Company compare to other jobs?

15 out of the 17 staff who participated had previous work experience 8 of these had one previous job. Of the 15, 9 had negative experiences of work. All 17 stated that The Quality Company was a good experience.

“I’ve had 2 other jobs; 1 as a cleaner. People treated me differently; they talked down to me and were not nice. I became ill and started to have panic attacks. I left after 2 months.

The second job was cleaning cars at a forecourt. I was treated like an idiot. People teased me and played nasty tricks on me. I left after 1 year.”



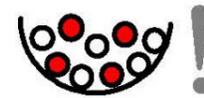
proud

Staff enjoyed going out and meeting people, compared to jobs that had involved being in an office, or shop, or confined to one place.

Staff felt proud of the job they do, thinking that it is worthwhile and important.

“Making sure people are happy with their support makes me feel happy and I know I can do something about it if they are not.”

“Earning money for the first time feels great! It’s different to the benefit money I get. I’ve earned it!”



more

2 staff said they needed more regular work and more hours. Both do not have anyone to support them in job coaching.

3 staff additionally spoke about wanting a regular stable income, which was something they missed about previous employment.



responsibility

Has working for The Quality Company developed people’s feelings of responsibility?

Staff we spoke to reflected this question in 2 areas of their lives;

Their responsibilities in the roles of Quality Assessor and Senior Quality Assessor - feeling responsible for:

- Making sure people get a say about their support
- Being able to help people speak out if they are not happy
- Working in a timely manner
- Having a responsibility to others they work with
- How they present themselves
- Showing others that it is possible to get a job

Their responsibilities outside of their job at The Quality Company had also changed. Their work had contributed to this happening:

- Having children
- Getting a pet
- Paying bills – for additional things, such as a mobile phone contract



community

Has working for The Quality Company had an impact on people's sense of community?

People we spoke to didn't feel it had helped them with their sense of local community, as they are often travelling to undertake their work.

Only 2 staff, that live in travelling distance from each other, saw each other socially and this was mainly prior to team meetings.

Staff felt that being part of a team had given them a sense of a work community by attending team meetings.

9 staff said that it had given them a wider understanding of the learning disability community. They felt they have a better knowledge of how the things people need differ and the different types of support that are available to people.



confidence

Has working for The Quality Company had an impact on people's confidence?

"I feel I have a better understanding of people with different disabilities and behaviour. I feel more able to explain to others how all people are different."

All staff felt their confidence in their job had grown. Staff had developed their confidence through the learning they had taken part in.

Staff expressed that they found their team meetings had helped them build confidence to speak in front of others and give their opinions.

People reported feeling more confident in their writing, speaking out loud and reading.

11 staff felt more confident in being able to talk to people they didn't know and meeting new people.



confidence

People in additional jobs felt that their confidence had grown in those roles too, as a result of feeling respected at The Quality Company and more confident in themselves.

People feel more confident to speak out about things in other areas of their lives that are wrong.

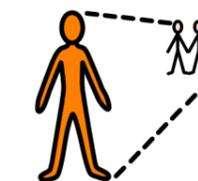
"I now have the confidence to tell the people who support me what is right and wrong with my support."



travel

6 people felt more confident in travelling using different transport and travelling to new places. 4 people were confident travellers already and 7 people think this is something they may be able to develop in the future.

"I can now travel by train independently. This has helped me visit new places in my spare time."



loneliness

Has working for The Quality Company reduced feelings of loneliness?

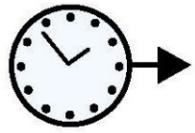
Staff response to this from the younger members of our team was a feeling that they have not been lonely.

Predominantly, these staff felt that having more money helped them develop their social life and meant they could go out more than they did previously.

Only 3 staff said that working for The Quality Company had specifically reduced feelings of loneliness.

All did say that it gave them a sense of purpose.

Staff reported feelings of boredom when they did not have any work planned.



future

What are people's thoughts for other jobs in the future?

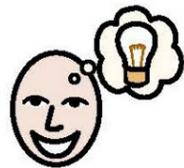
Of the 17 staff we spoke to,

15 staff are not looking to leave the employment of The Quality Company at the moment.

5 staff have developed other paid jobs alongside their work with The Quality Company and attribute their job as a Quality Assessor in aiding them to get an additional job.

3 staff have additional unpaid work or work experience roles that they are currently involved in.

"I'm not really looking for a job in the future, I really enjoy this job. It has given me confidence to get another job alongside this one though."



ideas

Some staff talked about what they would want to do as a career in the future;

- Working with poorly children
- Being a paid jazz DJ
- Working in the countryside
- Working with animals
- Working in administration

Staff reported finding barriers in making these desires into plans and being able to achieve their goals.

Barriers included not having an understanding of how to apply for the positions or not having someone to support them in applying for a job.

Additionally, some staff were not aware of what organisations and possibilities may be open to them.



conclusion

Conclusion

Exploring the 6 key questions, we have been able to identify that The Quality Company are impacting the Quality Assessors it employs in a variety of ways.

It has shown that The Quality Company are having an impact on all the staff we engaged with even if not in all the areas we looked at.

The Quality Company provides a good base of supported employment. A place staff can explore, in a relatively safe environment, what it is like to be in paid employment and develop the skills that are needed for this, e.g. working to a deadline, time management and good communication.

We will be working now to support people to develop and implement long term career plans.



Piloting employment opportunities in East Anglia

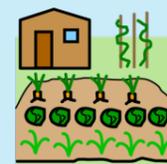
The My Way supported employment project, based in Thera East Anglia, commenced last year to test our approach to offering employment opportunities to more people with a learning disability. Growing in strength, it is helping transition more adults with a learning disability into employment in Cambridgeshire, Peterborough and Norfolk.

It has been an exciting 18 months, including securing funding from the Cambridgeshire Cultivate and Innovate fund. A significant amount of this money will go towards funding a Job Coach for 12 months who will work, alongside day-time support opportunities in the Fenlands area and East Cambridgeshire, with **12 people to seek employment opportunities in their chosen fields.**

There is further excitement around this project due to its joint working with The Royal Mencap Society and Prospect Trust. Together we will be supporting people to achieve their career goals, be it in paid or unpaid work.

Terri Dumont, Supported Employment Co-ordinator, said: “I am really looking forward to working alongside two amazing organisations - sharing skills and creating new opportunities for people with a learning disability.”

We are also pleased to report that **two of the people who have already taken part in the supported employment project have gone on to secure paid and volunteering roles.**



allotment

Ely allotment project

Thera East Anglia's community allotment is moving into its second year of production following a fantastic first year.

The allotment is based at the Bridge Fen site in the city and grows a wide range of produce including carrots, potatoes, onions and peppers, cucumbers, beetroot, pumpkins and butternut squash – to name but a few.

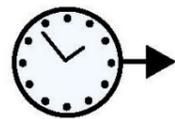


development

This year's developments include:

- The allotment's produce is regularly donated to Larkfields Community Café in Ely, an employer of people with a learning disability, where it is being turned into tasty meals.
- Over 20 pumpkins were donated to the Littleport Children and Family Centre in October. The children transformed these in to Jack O Lanterns and learned about planting and growing seeds.
- As part of the project, volunteers can now earn Time Credits⁷¹ which can be exchanged for rewards as a 'thank you' for their hard work. JC, an essential member of the allotment team, exchanges her Time Credits in her community to take her niece and nephew out for the day.

⁷¹ Cambridgeshire Time Credits have been running in areas across Cambridgeshire since 2014. The programme is funded by Cambridgeshire County Council, the CHS Group and Clarion Housing, working in partnership with Tempo, a social enterprise. Through Time Credits, people are encouraged to get involved in their community. Anyone can volunteer and offer skills to organisations involved in the Time Credit Network. For every hour a person gives to their community [...] they earn one printed Time Credit. They can spend it on an hour's activity in other community organisations, in local businesses and at large venues such as St. Paul's or the Tower of London. They can also share them with friends and family or use them to thank others in turn. Time Credits help to strengthen and build strong connected communities. It encourages volunteering across all age groups and enables people to give time to their communities in a wide range of ways. Time Credits create opportunities for communities to share assets and skills and work together in exciting ways. www.cambridgeshire.gov.uk



future

The future

The Prospect Trust Gardening Team, including those supported with a learning disability, will be building us a sheltered area with plenty of space for people to congregate and socialise while tending to the allotment.

The good news continues as the Ely Allotment Committee, impressed with the work so far, have gifted us the land for as long as we are there.



thank you

With thanks

We would like to say thank you to Cambridgeshire Time Credits for enabling us to reward our volunteers for their valuable contributions and hard work.

A special thank you this year goes to the Prospect Trust and the team of co-workers for raising funds for our project.

“The allotment is helping to teach the people we support how food is grown and how to eat healthily, as well as providing a safe space for them to socialise and make new friends.”

Terri Dumont, Employment Support Manager



business

Supporting entrepreneurs

Dolphins' Den

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. After attending a series of workshops, participants have access to 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.

We secured £110,942 from the European Social Fund and The National Lottery Community Fund as part of the Building Bridges⁸ partnership programme, to run 6 Dolphins' Den projects (2 per year) in Swindon and Wiltshire between September 2016 and September 2019.



In May 2018, due to some organisations leaving the consortium, we received an additional £15,000 which enabled us to increase the hours of our local Project Lead from 3 days a week to full time. This increased our budget to £125,946.95 over the three years.

This year we ran Dolphin's Den in two areas:

Salisbury and Trowbridge

In 2018, we ran projects in Salisbury and Trowbridge, with a morning and an afternoon session in Trowbridge.



project

⁸ Building Bridges is a 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 Social Fund and The National Lottery Community Fund as part of the 2014-2020 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 regenerations. For more information visit <https://www.gov.uk/european-growth-funding>

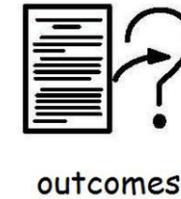
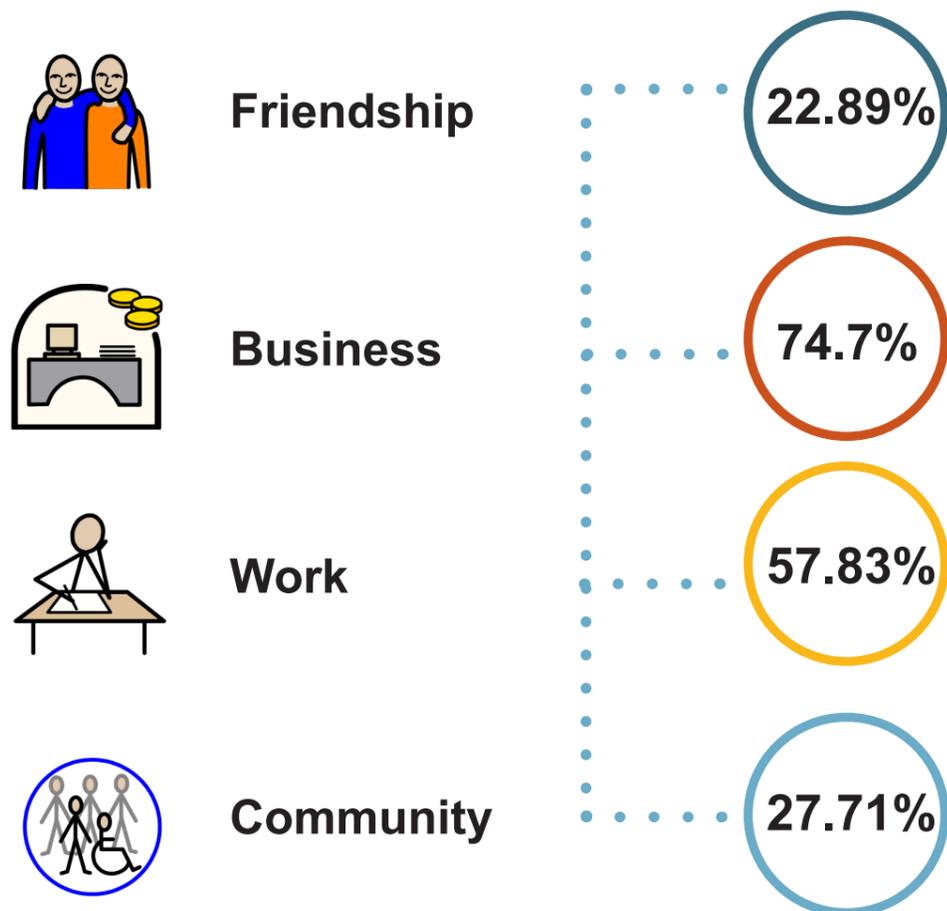
We completed the workshops in November 2018 and matched participants with mentors in June for a 6 month mentoring period. We ran our second celebration event at the Trowbridge Rugby Club in February 2019.

Our celebration event was a great success as two of our participants performed as part of the programme (one of them as part of main stream choir and one of them on their own). We also had two of our 2017 participants return as a Meet and Greeter for the event and as a Master of Ceremonies.

In January 2018, we employed a new local project lead. This gave us the opportunity to extend our offering to run one-to-one sessions with individuals who were unable to join our workshops or who have missed one.

Overview of Salisbury and Trowbridge projects as at December 2018 (end of projects)

20 participants attended at least one workshop with 16 continuing the project.



Outcomes in Salisbury, Trowbridge and 2018 one-to-ones:

- **Crafts:** A very talented crafter makes bags, pictures, decorates notebooks, plaques, pop-up cards and lots more. You can read more about her in the case study on page 69.
- **Gardening and landscaping:** A gentleman with fantastic skill in gardening came to our Salisbury workshops. He is still meeting his mentor a year and half later, who is adamant that he will get him a job. In the meantime other members of the consortium have also worked with him and given him the opportunity to volunteer for the National Trust. The mentor is currently helping him create a picture CV as he would not be able to interview for a job.
- **YouTube channel:** A gentleman who loves gaming wanted to set up his own YouTube channel with his friends.
- **Delivery business:** Our participant wanted to set up his own delivery business to help older people in the community to do their shopping. After some research with his mentor, they realised that he would not be able to afford his insurance. However, he has not given up and is looking for a job.
- **Useful crafts:** A lady with severe mobility issues came to our Trowbridge workshops. She makes her own unique and practical crafts such as bookmarks. At the same time as starting with a mentor, her house was being refurbished to make it more accessible. She therefore paused her work. We offered to continue to support her when she was ready to come back.
- **Braille gifts:** A lady who is registered blind came to our workshops in Trowbridge. She passionately wanted to create braille gifts. We matched her with a mentor, however, they struggled to find material that they could use to make things by hand.



project

Chippenham, Swindon and Fairfield College

As our funding runs out in September 2019, we began our last set of projects for 2019 in October 2018. We re-organised workshops in Chippenham as we initially had 3-4 people interested in that geographical area and at Open Door in Swindon, where we also had 4-5 people who were interested.

We also ran a set of workshops in collaboration with Fairfield Farm College. We completed all of our workshops in June 2019 save for the last one at Open Door, in Swindon.

Alongside the workshops we are still running one-to-one sessions with 4 people.

In the third year of running this project in the same geographical area, we found that most participants that joined Dolphins' Den did not have a tangible business idea, but wanted to come along to learn and do something different. This meant that the number of new participants we matched with a mentor were fewer and we spent a longer time with them to narrow down what they would want to work on with a mentor.

In our future planning we will use this learning to input to our research to gain a better understanding of the projected uptake and length of time we should base our project in each geographical area.



overview

Overview of Swindon, Chippenham and Fairfield Farm College projects in 2018-2019 as at March 2019

18 participants attended at least one workshop with 10 continuing to the end of the project.



Friendship

56.67%



Business

48.33%



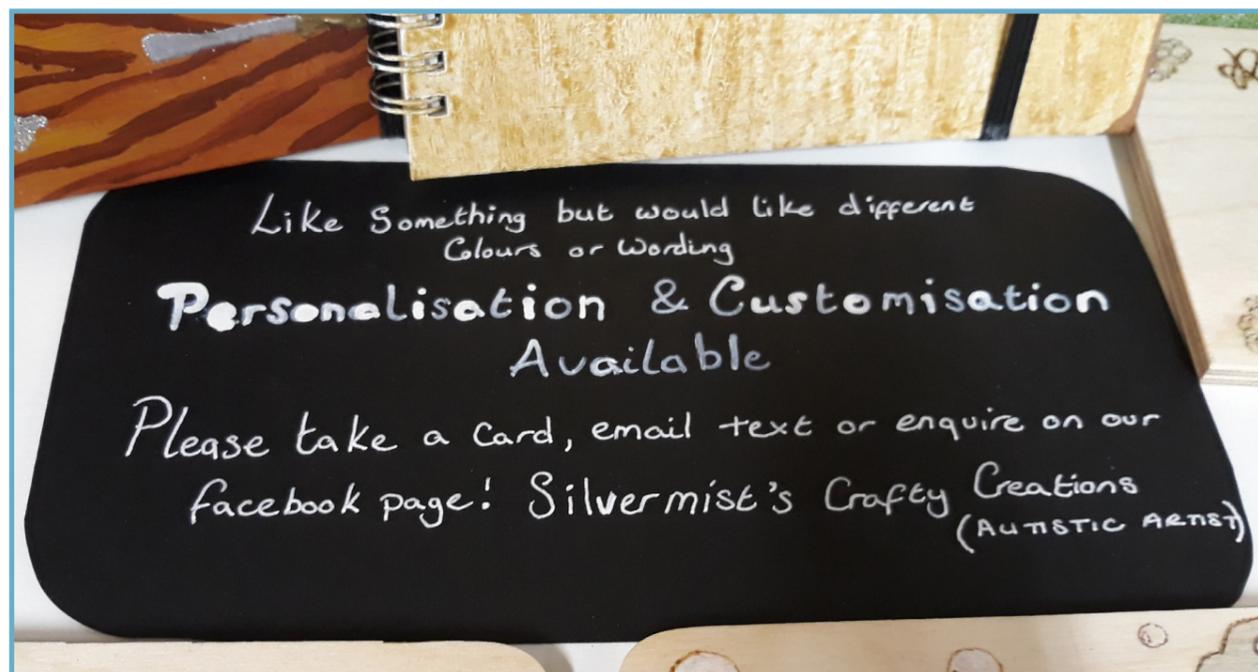
Work

45%



Community

25%



All participants thought the workshops were good.

Supporters said that the workshops were at the right level and described them as 'inspiring', 'excellent', 'useful' and 'fun'.



individual

One-to-one sessions:

Since we have recruited a local project lead, we have been able to offer one-to-one sessions to those who are unable to attend our workshops.

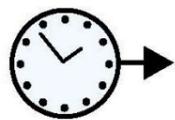
- Number of participants we are running a one-to-one session with: 3 in 2018 and 5 in 2019.
- Of the 5 participants who have/had one-to-one session since 2018/19, 1 left the project due to personal circumstances, and 1 is a returning participant from 2017, who did not want a mentor at the time.



outcomes

Outcomes in Chippenham, Swindon

- **Chill out hub:** A very energetic young lady wants to offer a space to everyone, where they come and chill out during a busy day and connect with other people.
- **Soaps and bath bombs:** A gentleman on our one-to-one programme is focusing his many ideas and talents to making bath bombs and soaps, with the aim of having enough stock ready to sell for Christmas 2019.
- **Singing at parties:** One of our Salisbury participants is a very talented opera singer. We were not able to find an appropriate mentor for him last year, but have made a successful match with one of our previous mentors this year. While he is practicing with his singing teacher, our mentor will help him research opportunities and to market himself to the right audiences.



future

The future of the project

This source of funding for this project has now come to an end. We are currently working to develop the Dolphins' Den offer as part of the development of employment and training opportunities across Thera Group.



story

In 2018, a very talented crafter came to our workshops in Salisbury. She made bags, decorated notebooks, plaques and lots of other things. She is autistic and was very anxious, extremely shy and lacked in confidence and self-esteem when she came to the first workshop in January 2018. She had to bring coping mechanisms to the workshops e.g. headphones so she can privately listen to music and sensory items that she can touch and feel. She would use these items to lower her anxiety levels.

Over the course of the workshops, she slowly became more confident, grew in self-esteem, became less dependent on her coping aids and eventually felt confident enough to talk about her business idea and the work she had done during the workshop exercises. She also started working and sitting with other participants.

Half way through the project she came across an issue with her welfare benefits. The requirement of having to go to the job centre every two weeks gave her a lot of anxiety and she was unable to attend review meetings alone. Previously, she might have given into the pressure of obstacles like this, finding it too stressful and giving up on other things in her life, like Dolphins' Den and self-employment altogether. However, by speaking to our working on benefits workshop facilitator and with the encouragement she received at Dolphins' Den, she decided to face her fears and to try to solve the obstacle instead of giving up.

We matched her with a mentor whose wife makes bags herself. She needed support to push her business out, market it and sell the stock she had accumulated. She worked with her mentor for over a year to manage the finances of her business and setting out a business plan. The mentor has also taken her items to a craft shop in Devizes called Beeze's where they agreed to sell some of her work. Finally, in June 2019 she made her first sales just before Father's day.

As her mentor now needs to step away, we have linked her up with another mentor, who is an accountant, who will be able to help her in this area of her business.



community

Broader community and social networks

Equal Futures

Equal Futures is a small charity within Thera Group supporting people with a learning disability to develop circles of support.

We have a strong Vision and Mission to reduce loneliness and isolation amongst those with additional support needs.

Our work has traditionally been based on paid facilitation by a Community Connector working alongside people to develop and sustain Lifetime Circles⁹.

To ensure that we can broaden our reach to families, we have also developed a volunteer model of support.



story

Debbie¹⁰ has a Lifetime Circle. This is what it means to those involved:

“We meet up and make good decisions”

– Debbie

“It keeps the important people in her life in contact”

– her brother

“It gives Debbie an understanding of the friends which are part of the Circle and lets them find out more about her to assist in ways which would not be noticed if the Circle was not in place.”

– Circle member

⁹ Lifetime Circles

A Lifetime Circle will offer friendship and support to your relative throughout their life. This will range from simply spending time together to helping find solutions to problems. A Lifetime Circle is for longer commitment:

- you want peace of mind that others will appreciate your relative as much as you do
- you don't want to be completely dependent on Local Authority or Social Care Services
- you want to plan for the future by putting wills and trusts in place

www.equalfutures.co.uk

¹⁰ Name has been changed



story

Developing Smart Circles¹¹ with Volunteer Facilitators has given us insight to how it can be a better model for everyone:

- More availability of resources to recruit and support volunteers
- People who choose to volunteer tend to have more regular availability
- Better fit with models of social inclusion not to have a paid facilitator

Jen¹² and her husband Mark were keen to have a Smart Circle for their son David, who is in his late teens. They all had ideas about what might interest David in the next stage of his life but were unsure of how to pull it altogether.

When we started working with the family we asked how they felt about David's future. Jen and Mark felt let down by other services, saying that they felt, “Powerless. Despondent. Alone. Angry. Let down. Overwhelmed”.

The process of forming a Circle for David made a tremendous difference, “My son's goals were always clear. With the Circle we feel we have more brains and knowledge to help them happen. Also, more people to share the burden of holding service providers to account when needed.”

It was very clear from the outset that this was a ready-made circle of family and friends who all knew each other. David had a poster on the wall that we had worked on together which outlined all his goals. Everyone contributed and came up with some great ideas.

Jen sums up the invaluable support delivered by Equal Futures. “Our son is boosted in confidence and feeling cared about. A very positive experience for him. It's a great tool for families to help them survive a very overwhelming and inflexible system.”

¹¹ Smart Circle - A Smart Circle can help at a time when you feel stuck.

This could be when:

- you feel lonely and want to make new friends
- you're moving to a new place to live
- you're leaving school or college www.equalfutures.co.uk

Over a period of 6 months to 1 year a Connector will work alongside a person to build relationships and community connections in order to achieve their goals.

¹² The names in this story have been changed



work

Our work

- We support individuals, families and volunteers to develop meaningful and lasting friendships.
- We train and carefully match our volunteers to develop supportive and positive relationships.
- We have a holistic approach, reaching people where statutory services either can't or won't.

Equal Futures has been diversifying settings we work in to including a pilot working with 4 school leavers to have more involvement in understanding what choices were open to them after school, each pupil having a Smart Circle in which they took the lead in directing their own goals and making key decisions.

Equal Futures was keen to offer volunteering opportunities to young adults. The school is an area of high unemployment, particularly among young people under 25. We worked in partnership with another volunteer project running at the school and a community project both of which had a focus on employability for young adults.

We also continued our work in the East End Carers Hub. The pilot began as a partnership with East End Carers Hub, in Shettleston, Glasgow¹³. Most of the Carers who attended were parents of children and young people with Autism.

A parent told us that:

“I feel that my daughter’s world is beginning to open up more. She is becoming involved with other people and having fun going to soft play and the park with her facilitator. She is happy and relaxed and able to trust another person besides me. My Family Link Worker is an invaluable support by providing information regarding activities in our local community that my daughter can attend.”

¹³ The most recent Scottish Index of Multi Deprivation (SIMD) in 2016 ranks Shettleston as being in the highest 10% of the most deprived areas in Scotland.

TEN Partnership (Thera (Scotland), Equal Futures, Neighbourhood Networks) was a 3-year partnership which began in 2015. It was funded by the Scottish Government under the Self-Directed Support Innovation Fund.

The aim of the TEN project was to help people live a good life, rather than simply to have a support package. There was a strong focus on developing informal peer networks. Whilst this has now come to an end as a partnership for Equal Futures – it remains a great success for the 10 young people involved.

For Equal Futures, it has been a springboard to put in place plans to share our learning to work alongside Thera Companies across the Group to support them to further develop circles of support around the people they are formally working alongside.

We aim to use our Friendship Matters training as a basis to develop Group wide policies and training alongside Thera Trust’s Learning and Development team.



impact

Developing our impact

We have noted an emerging theme in our referrals. People were living with family, with limited or no support from other agencies. There were often no social connections outside of the immediate family. The person therefore had very limited experience of forming relationships with others, or experience of choosing what they would like to do.

This has led to our understanding and development of three distinct stages of our work: one to one support (befriending), community connecting and circle or network facilitation. Where we begin with an individual largely depends on where they sit on the spectrum of social inclusion.

1. **One to one support or befriending** - If someone is very isolated with no connections outside their family or paid staff, the first step is for the volunteer facilitator to get to know the individual. This helps the person with a learning disability or autism to establish a new relationship on their terms at a pace which feels comfortable.



2. **Community Connecting** - When the individual is ready to meet others who share their interests, the volunteer facilitator investigates community resources. The aim is to find places where there is a strong likelihood of the individual making social connections which will develop into friendships.



story

Angela¹⁴ has autism and wanted support from her befriender to help overcome some of her social anxieties. She told us: “I now attend community-based talks with my befriender so that my unpaid carer/best friend/flatmate can rest. I signed up to volunteer for a local veteran support charity which has been a long-term dream! I feel at professional meetings at work that an “inner befriender” is sitting next to me and I speak up more and with more confidence.”

3. **Circle or network building** - When someone has a more expanded network of people in their life, then building a circle may be appropriate, and a volunteer facilitator can begin the work of helping the individual to invite people to join their circle of friends.

14 Name has been changed



gig

Gig Buddies

Gig Buddies Scotland aims to link music fans who have a learning disability with other music lovers for gig nights or other activities they enjoy doing together.

Our Gig Buddies Scotland has made some exciting developments in the past year. From creating more pairs of Gig Buddies (matching our members to like-minded volunteers) to getting out to more events, the project is going from strength to strength.

We have some exciting news about developments in Glasgow in the coming year! In June 2019 we received funding from the

National Lottery Community Fund to run Gig Buddies in Glasgow for 3 years, starting in September 2019. To help manage the development and growth of the project, we are hiring 2 local project coordinators, one in Glasgow, and one for our West Lothian Project. We're excited to be building a team to develop Gig Buddies across Scotland.

The project now has **30 pairs of Gig Buddies** across Edinburgh, Midlothian, and West Lothian, who are getting out every month to enjoy their shared passion together. A member who has only had a buddy relationship for 5 months says:

“I’ve definitely been getting out more since getting a volunteer. Having a Gig Buddy has been pretty great.”

Other people have been with the project for much longer and it's amazing to see how our pairings relationships develop over time.



volunteer

A volunteer who has been with her Gig Buddies for over two years says:

“I’m so pleased that my Gig Buddies pairing has provided a true friendship, where both my Buddy and I have gained so much from our time together. We have been to many events, from the theatre to just meeting for coffee.

I have moved away, but we have not allowed the distance to challenge us, and continue to talk and see each other as regular as before. In June 2019, we are going on holiday together to Rome, which we’re both very excited for.”



parents

It’s also been fantastic to speak to parents and carers about the impact that the project has had on the people they support.

“As a carer Gig Buddies has been great for us. We are especially pleased that it keeps our daughter in a social group which she would otherwise not have. My daughter goes to Gig Buddies events where she can socialise more widely, but her and her buddy also take turns to choose what they want to see together. That way they widen both their horizons and it’s been working really well.”



ambassadors

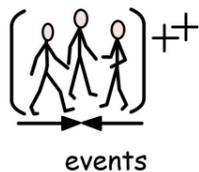
We are also proud to have recently recruited and **trained 4 people to be Gig Buddies Ambassadors**. These are members who are now volunteering with the project. They will help tell people what Gig Buddies is about and how they can get involved, and will help to develop Gig Buddies. Our ambassadors are Ant, Kerry, Richard, and Don. They’ve written a few words each on why they’ve become an ambassador:

Ant – “It took a little bit of encouragement to be convinced it was a good fit for me. In the words of my idol, Elvis: ‘I never expected to be anybody important’. I love music and like to share that. I want to help people.”

Kerry – “I’m looking forward to getting more people involved. I want to make sure that new members feel comfortable. I can’t wait to get out and talk about Gig Buddies!”

Richard – “Gig Buddies means a lot to me. I’m really looking forward to being more evolved with project, and building my confidence as an ambassador. See you at events in the future!”

Don – “Gig Buddies has a lot going for it, but I think it can go a lot further. Being an ambassador will mean I’m more involved in developing the project. I’m looking forward to doing outreach work as I want more people to be involved.”



Finally, we've been getting out to some amazing events, and building some fantastic relationships with local venues, festivals, and organisations. In January this, as part of Independent Venue Week, we teamed up with local Edinburgh venue Sneaky Pete's and enabled our members to attend 5 gigs in 5 nights. For some of our members it was the first gig they'd ever been to with one member saying:

"I'd never been to that kind of gig before; it was all new to me. I'd love to go to more gigs like that. I'd give the night 10/10"

We've also recently started a new partnership with the RSNO (Royal Scottish National Orchestra), we will working with them to let people know how they can easily access classical concerts.

In August we will be holding our biggest ever event, Fringing 9-5 will see a group of Gig Buddies get out to the Edinburgh Fringe Festival for 20 hours from 9am until 5am the next morning. We will then be telling people about our experience of this later in the month at an official fringe talk called 'Fringing 9-5: 20 hours at the Fringe'.

Limits and Challenges

We can demonstrate in this report the vast range of impacts achieved by our teams working alongside people with a learning disability. However, there are key areas where we will look to make improvements in future and challenges we need to meet:

- We are aware of the increasing need to be creative about how we attract staff to work with people with a learning disability as the labour market tightens and to be an employer of choice in social care.
- Quality standards – in the standards Leading Your Own Life and Designing Your Support, there has been lower results this year. As with Leading Your Own Life standard last year, this is most likely due to specifically a lack of visibility on Person Centred Plans (PCPs). PCPs have traditionally been paper-based and readily available for inspection. It is reported by assessors that due to these, in the main, being on-line, people sometimes do not want to, or are unable to, log onto their plans and consequently cannot share them with assessors. Building on the work carried out a few years ago to launch iPlanit, through our current IT strategy we are seeking to make on-line plans more accessible.
- Short-term funding for areas of work such as supported employment has been cited as one of the main reasons for the reduction in numbers in the Unity Works programmes – people with a learning disability often require a longer lead time to gain employment and longer input to sustain it. Thera Trust is to look at other fundraising opportunities to support this work.
- In addition to the above, people falling out of the eligibility criteria for social care funding or being assessed as being able to financially contribute to the cost of care, has meant some people choosing not to access training services.

Financial Information

Key financial information	2018/19 £'000	2017/18 restated £'000	2016/17 £'000
Total incoming resources	69,975	67,204	64,592
Total resources expended	69,479	66,016	61,562
Net gains / (losses) on investments	264	294	(389)
Net income for the year	759	1,482	2,641
Net actuarial gains / (losses) on DB pension schemes *	45	573	(22)
Tangible and intangible fixed assets	3,139	2,881	3,153
Investment properties and investments	7,288	7,118	7,544
Current assets (excluding cash)	11,600	9,517	9,628
Cash balance	4,219	4,918	1,269
Total assets	26,246	24,434	21,594
Current liabilities	6,155	7,389	7,541
Long term liabilities	8,128	5,774	4,309
Pension scheme liability	689	800	683
Total liabilities	14,283	13,163	12,533
Net assets	11,274	10,470	9,061
Net cash inflow / (outflow) from operating activities	(953)	918	513
Net cash inflow / (outflow) from returns on investment and servicing finance	(408)	(201)	(231)
Net cash inflow / (outflow) from capital expenditure and investment properties	(490)	882	(651)
Net cash from issue / (repayment) of bonds	1,455	2,546	0
Other cash inflow / (outflow)	(211)	(35)	(507)
Increase / (decrease) in cash in the year	(607)	4,110	(876)

Key financial ratios	2018/19	2017/18	2016/17
Net asset cover	299%	240%	265%
Interest cover	383%	589%	471%

*The figure for 2016/17 represents a re-measurement on defined benefit pension liability

Please refer to the Thera annual report for the full accounts. Numbers may not add due to rounding.



review

Financial Year In Review

Thera has continued during the year to provide a range of care, support and services to people with a learning disability, in line with its Vision to demonstrate that its beneficiaries can be leaders in society. As was the case last year, there have been few major developments as Thera has focussed on its core activities, supporting each individual with a learning disability to lead an independent and fulfilling life, as well as increasing the number of beneficiaries that it supports.

The Group has continued to benefit from organic growth in most areas and revenues have also grown as a result of increases in contract prices and in rental income from properties funded via social investment. Group turnover has increased year on year by £2.8m (4%) from £67.2m to £70.0m.

Thera's total reserves grew in the year by 7.6% to £11.3m. This is equivalent to approximately two months of operating costs cover. Thera's trustees continue to pursue a progressive policy of growing its reserves.

On an accounting basis, the Group's overall net surplus has fallen from £2.1m (re-stated) in 2017/18 to £0.8m this year. However, after excluding the impact of pension scheme adjustments and non-cash donations, the underlying overall trading surplus reduced from £1.0 m. to £0.7 m, reflecting an increase in exceptionals from re-structuring and property disposals and a net increase in staff costs compared to income, a consequence of Thera's response to the tighter labour market, although this was offset by a reduction in overhead costs.

The liability associated with Thera's historic final salary pension provision through a multi-employer scheme, closed previously to new entrants, can be more accurately determined following a change in the information available from the Scheme Administrator. Until this year, the Scheme has been unable to split out its assets and liabilities to individual employers. This has now been addressed. Thera has therefore restated the reserves figure for the previous financial year and its net pension liability has reduced by £100k.

Thera continues to recognise that its ability to recruit and retain high quality staff is essential in providing the high quality care, support and services to its beneficiaries and in fulfilling its overall Vision. Thera has increased the rates it pays to its staff, which continue to exceed the National Living Wage. There has been an uplift in expenditure, linked to organic growth and increases in general staff costs. In some locations, staff costs have increased at a rate greater than price inflation to address localised retention and recruitment challenges.

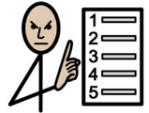
In 2018, Thera negotiated an additional £12.5m of funding from Cheyne Capital's Social Property Impact Fund to supplement the £15m agreed in 2015 that was fully utilised. To the end of the year, £1.8m of this has now been drawn or committed. This fund provides property by way of long-term lease to Forward Housing across the UK. Forward Housing works with individuals and their families and wider circles of support to identify a suitable property, which is then purchased by Cheyne Capital and adapted by Forward Housing to meet individual need, and finally 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. The relationship with Cheyne Capital has continued to generate additional income - rental income for the Group has grown by £149k - as well as contributing to the £2.8m increase in overall revenue from care and support contracts.

In February 2018, a further Thera Bond offer was offered to retail investors. £2.5m of this was drawn within the financial year under review, following a partial drawn down of £2.5 m. in the previous financial year, leading to a material injection of cash and an increase in long term creditors. This further pioneering bond will play a key role in helping Thera to deliver its strategy by purchasing up to an additional 15 homes for 25 people and providing working capital. In addition, funds raised were also used in April 2018 to settle Thera's first bond, for which this impact report was originally produced.

Thera's current liabilities have reduced by £1.2m during the financial year under review, largely reflecting repayment of the first bond. Long term liabilities have increased by £2.6m, as a result of the partial bond proceeds received in April 2018. Cash overall reduced overall by £0.6 following the bond repayment and as a result of changes in working capital across the year end and the purchase of further properties. The cash position, nonetheless, remains strong at £4.2m for the Group.

The one significant development during the year has been the restructuring of The Camden Society into separate entities. This was undertaken to provide more focussed management of the Society's differing activities as well as for financial reasons. Unity Works Social Enterprises has been established as a new charity, taking on and developing The Camden Society's employment, training and social enterprise activities aimed at helping people with a learning disability to gain and to maintain employment. The Camden Society (London) is a new not for profit company, taking on The Camden Society's other activities in London and providing support at home, in the community and short breaks for people with a learning disability who live in a number of London boroughs. The restructuring also affects Thera South Midlands, whose support to people living in in Leicestershire, Northamptonshire and Hertfordshire is now delivered by The Camden Society alongside its support in Oxfordshire. Thera South Midlands will continue to be responsible for a number of contracts, with the delivery sub-contracted to The Camden Society in a short-term transition phase, after which Thera South Midlands will become dormant.

The next period will be one of continuity with a focus on delivering Thera's core activities. Revenues are expected to continue to grow. A new large contract in the West Midlands to support 51 people was awarded after the end of the financial year, which will have a positive effect on revenue for the coming year. However, increasing and ongoing labour market challenges are expected to continue to weigh heavily on costs and impact on the surplus for the year.



governance

Governance

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, a paid executive 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's group structure enables the individuals supported by its main local companies (as well as their family and staff) to have control of the company that provides their support, through being a company member and by appointing an independent director to the board to represent them. The group structure allows local boards and senior managers to get to know, and to work closely with, the individuals that they support, their families/carers and the communities in which the company works. As part of the Group, they benefit from being part of a larger whole, as well as having access to working capital and central corporate support services.

Thera Trust, the Group's parent charitable company, is governed by a Board consisting currently of nine directors, who are also trustees for the purpose of charity law. Four directors/trustees are paid and make up the Group's Executive Team, and a further five directors/trustees are non-executive voluntary directors/trustees. The role of Non-Executive Chair is currently held on an interim basis, following the departure of Bill Carter after nine years. Thera Trust is in the process of recruiting additional non-executive directors/trustees, including an anticipated appointment to a new co-Chair role, jointly held by someone with a professional background and by someone with lived experience of learning disability.

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



investment

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.

Investor History

Thera has been pioneering in its ability to tap multiple sources of social investment (repayable finance from mission-aligned investors) and has now established a track record, from which it may be able to benefit further in future.

Thera issued a £1m exchange-listed bond in April 2015, as arranged by Investing for Good under a wider £6m programme. The bond, offering a 3.5% financial return to investors, was successfully repaid by Thera in April 2018. This repayment in full was one of the first 'exits' in the social investment market.

In July 2015, an agreement was also made with Cheyne Capital's Social Property Impact Fund which made available up to £15m of property by way of lease to Forward Housing to enable more people with a learning disability to have a home of their own. An arrangement to provide a further £12.5m of repayable capital for the same purpose was agreed with Cheyne in 2018. As at March 2019, Thera had drawn/committed £1.8m of this additional sum, which is allowing the organisation to support an additional ten tenants across six properties.

Bonds have been a favoured route for Thera to raise investment and an additional bond £2m of bond finance was raised in November 2015, arranged by Triodos Bank. These funds are being 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 due to be redeemed in December 2020.

In April 2018, Thera successfully closed its first crowd-funded bond, also arranged by Triodos Bank. The funds raised are intended to purchase up to an additional 15 homes for 25 people and provide further working capital.

The bond generated £5m from social investors on a 6 year term, paying 5.5% interest. Some of the proceeds were assigned to settle the first bond.

Thera Trust also retained £161k of its 2018 bond issue in treasury at the end of the period, with the specific intention of stimulating the secondary market in charity bonds. A number of these bonds were sold on the secondary market after the year end.



overview

Marketplace: Position and Risks

Sector Overview

The social care market continues to experience significant funding challenges as commissioners attempt to reconcile increasing demand against a backdrop of austerity. Although limitations on public funding persist and are unlikely to be sufficiently overcome in the short-term, this has so far had limited impact on Thera's own activities.

Thera supports people with a learning disability, and the majority of its income relates to those who have a substantial and critical assessed need. These individuals are at a much lower risk of having their support reduced because of funding constraints, with local authorities and commissioners prioritising this area of spending. Such impact as there has been from reductions in individual commissioned support has been more than overtaken by both organic and acquisitive growth. In a very challenging funding environment Thera's turnover has actually increased and by 57% from £44.6m (2013/14) to £70.0m (2018/19), with reserves growing by over £5m in the same 5 year period - from £5.6m (2013/14) to £11.3m (2018/19).

As is the case for all care and support providers, Thera is exposed to a range of external factors that could put pressure on continuing the provision to people with a learning disability. However, the specialist area of the market in which Thera operates benefits a significant reduction in these factors 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.

Within the UK, there is considerable geographical variability in commissioning practice, procurement methodologies and pricing. Thera continues to maintain a flexible, efficient and cost-effective organisational structure and is able to mitigate the risks of this variability from the diversity of its revenue streams, as well as accommodating further organic or acquisitive growth.

On the cost side, social care organisations across the UK are facing challenges with staff retention and recruitment. In some cases, this results in having to take on agency staff at a higher overall cost. In 2019-20, adapting to a tighter labour market is expected to weigh heavily on Thera's year end results.

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 and continued organic growth.



risk

Risk Factors

Thera Trust's trustees closely monitor the risks to which Thera is exposed to through an active risk management strategy. Key risks which are inherent in the nature of Thera's work include the abuse or neglect of vulnerable people and non-compliance by one of their companies with CQC fundamental standards and other regulatory requirements.

The board continues to monitor the external regulatory and funding environment closely. In July 2018, a judgement (unrelated to Thera), passed in the Court of Appeal, appeared to have removed the uncertainty about how the National Living Wage applies to 'sleep-ins', which could have resulted in the need to make unfunded back payments. However, an appeal is now being heard in early 2020 and the possibility remains that the judgement could be overturned. This would have a material impact, not only on Thera, but the wider social care sector.

More broadly, risks to which Thera may be exposed may arise from the following areas:

- smaller companies in the Group continuing to make a loss as a result of supporting too few people;
- challenges in pricing of contacts by local authorities;
- localised labour market supply and cost inflation;
- not meeting financial covenants on current investments;
- damage to relationships with key customers;
- loss of key leadership and management;
- personnel risk and regulatory intervention either by CQC/CI or the Charity Commission/OSCR;
- litigation risk, especially in relation to developments in employment law;
- unforeseen issues relating to the UK's withdrawal from the European Union;
- changes in legislation and investment performance related to pensions.

Other than those risks outlined above, there have been no material strategic changes within the organisation that are perceived to expose the organisation to additional material risk and the nature of Thera's core activities has not changed to include areas that might bring additional risks.

Trustees are satisfied that Thera companies have the appropriate processes and systems in place to mitigate the incidence and impact of these risks, albeit some are external or system-wide and will always remain outside the organisation's control.

Next Year



Continued development of leadership by people with a learning disability

- ✓ Introduce a Co-Chair for Thera Trust board of Trustees
- ✓ Document our story, experience and learning with leaders with a lived experience of learning disability

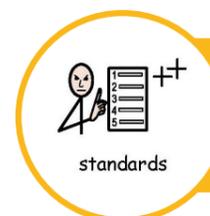


Continuing to promote and influence the inclusion of leaders with lived experience of a learning disability in other organisations



Continued development of Company Membership

- ✓ Launch revised accessible information on company membership to encourage more company members to join our Thera companies



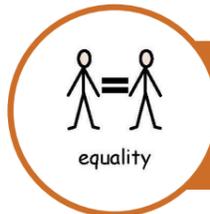
Further develop our Quality Assurance Standards in relation to Health and Wellbeing



well-being

Continue supporting people in their day-to-day lives to improve their opportunities for greater personal and social wellbeing, with a continued focus on:

- ✓ enabling better access to health services
- ✓ supporting our teams to work towards NHS England's STOMPwLD initiative (Stop Over-Medicating People with a Learning Disability)
- ✓ improving people's housing environments
- ✓ promoting and delivering greater community access and inclusion



equality

Continuing to ensure equality of support to people with complex behavioural needs



housing

Facilitating access to housing for more people that meets their complex housing needs, including our benefitting from continued bond finance and from our ongoing partnership with Cheyne Capital



money

Reach more people with a learning disability to improve their financial health and enable their control of their own money



project

Deliver on the NatWest Skills and Opportunities funded project - Your Money, Your Life - offering workshops to 200 young people and their families



employment

Continue to support people into employment through Unity Works Social Enterprises' work programmes and widen our reach in supporting people into employment and training opportunities across the UK



Dolphins' Den

Review our Dolphins' Den offer as part of the wider employment and training opportunities provided by Thera Group



community

Further develop our approach to developing the communities within which we work to include and support people with a learning disability



equal futures

Review and plan Equal Futures offer of support across the entire Thera Group



GIG BUDDIES
SOUND PEOPLE

Support the development of Gig Buddies into Glasgow and beyond



funding

Seek a range of fundraising opportunities to enable the further development of employment and training opportunities



impact

Develop and strengthen our Impact Management systems approach and practices

Appendix 1 - Overview of Methodology

The Good Analyst – Overview of Methodology

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.

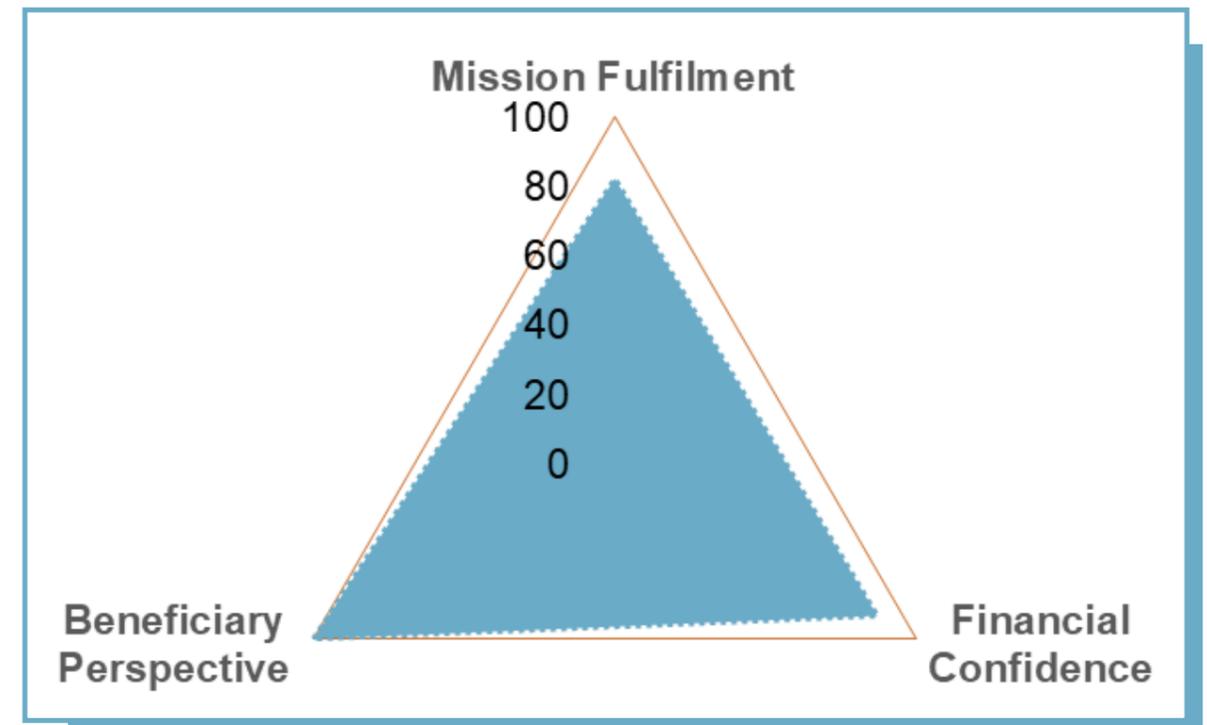
Beneficiary Perspective, which considers the organisation and its impact with respect to the value to its beneficiaries of the impact it is creating. By analysing the beneficiary perspective, we can establish that the organisation works with its beneficiaries, and empowers them wherever possible to achieve 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 below, 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 2018/19: Breakdown of Scores



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

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