



Supporting people with a learning disability



Annual Social Impact Report

2019 - 2020



INVESTING FOR GOOD

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Social Impact and Financial Confidence Scores

By Investing for Good

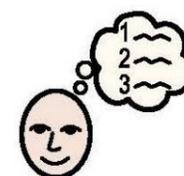


context

Context

The findings of this impact report are based on social and financial data, collected and provided by Thera. Investing for Good independently evaluates Thera's social impact and financial performance over the year and assigns a score to each.

This is Thera's fifth impact report that has incorporated this analysis and is set in the context of the charity's social investment activity. Thera is a pioneer in the field, having issued bonds for social purpose from a wide array of investors in the market, who are all drawn to the potential for achieving both financial and social returns, which will help Thera deliver its mission.



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

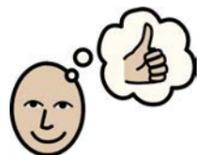
Financial Confidence is a measure of financial confidence in the underlying organisation. The confidence rating is not a snapshot of current financial performance, nor a relative measure to a previous financial year. It uses historic data to reflect the long term outlook for the organisation. It is based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



results

Results

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



impact

Social Impact Rating Rationale

Thera continues to have a strong and consistent record of high quality service delivery both for and with people with a learning disability across the UK. Thera has demonstrated its strengths in identifying the bespoke needs of its beneficiaries and designing and delivering appropriate people-centred services. Thera prioritises forging opportunities for people with a lived experience of learning disability to take up both leadership and operational positions within the organisation, and has robust systems in place to consult with beneficiaries to ensure services and operations are appropriately meeting the needs of the people it supports.

Thera's impact strategy is well aligned to its service delivery plans, with a clearly articulated and logical theory of change covering six broad outcome areas, namely leadership, financial wellbeing, access to housing, personal and social wellbeing, social and community networks, and enabling access to employment and training programmes.

Thera has a clear impact management system which provides measurable indicators and data collection methods for each of these outcome areas.

The impact measurement frameworks employed measure a range of outcomes from tangible outputs such as access to housing, training and employment, to softer outcome measurements such as beneficiary satisfaction, levels of independence and quality of life. There are also rigorous measures to tracking performance of Thera itself in its service delivery (Thera Quality Standards). Beneficiaries are involved in the creation of their own success indicators and measures, through the IPlanit tool for example. Beneficiaries are also employed and trained as assessors which ensures representation and consultation in the impact management process.

Thera is collecting a bank of data which is verified for accuracy, and this is being used as a means to scrutinise its services and ensure it continues to meet the evolving needs of the people it supports. However, there is a margin for error presented by the fact that the system uses a number of different frameworks which are compiled using Excel – while the system appears to be functioning well, an impact management software, which can be customised such as SoPact or Social Suite would allow for greater streamlining of approaches, simpler data collection, analysis and reporting, enabling better evidence-based conclusions to be drawn while saving time on data entry and increasing efficiency.

The vision and practices described here support our assessment of Thera having a low impact risk, i.e. the probability that impact is different or weaker than expected is low.



Financial Confidence Rating Rationale

Thera has been awarded a score of 1, the highest Financial Confidence rating available. Revenue levels this year have risen as a result of additional support to more people and an increase in prices.

Thera can point to outstanding financial management with a ninth consecutive year of revenue surplus. Whilst the first quarter performance was not as strong and the use of agency staff and exceptional items, such as losses at social enterprise cafes, acted as a drag on financial performance (one of the original bond covenants was, albeit narrowly, not met, a sign of financial stress), generally this was another positive financial year. Thera saw price increases in its contracts and higher rental and fundraising income. There were increases in charitable reserves and assets from an already strong position.

Although Thera achieved the highest score in this category and continues to deliver a robust financial performance, there are no assurances that it will score as highly next year and external challenges facing the sector and the organisation, particularly in the labour market, remain marked. In addition, the final financial impact of COVID-19 on the social care sector remains to be determined.



Thera has been awarded the highest rating in both areas.

Foreword and Executive Summary



Our 2019-20 impact report celebrates successes and developments for many of the people we support – moving to a new home, going to a gig with friends, or getting a job – and illustrates the impact that companies across the Thera Group can have on people’s lives. There are also many people behind these headlines that may not have had a standout achievement in the year, but have continued to be supported to live the life they choose and this is at the core of our impact.

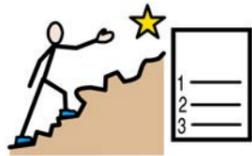
As the new COVID-19 virus emerged in the UK at the beginning of the calendar year, our attentions were diverted from impact measurement as new policy, guidance and changed practice required our full attention. The reporting period finishes in March 2020 just as the country went into lockdown and this pandemic has of course had a significant impact on our work with people across the Group, both in our direct support and from our ‘back office’ teams that support the Group’s work. Our 2020-21 report will pick out much of the impact from the pandemic, but you will also see the beginning of its influence highlighted at times in this current report.

The COVID-19 pandemic has also inevitably but unfortunately delayed the publication of the 2019-20 report as Thera put ‘all hands on deck’ to adapt to the new situation. We would like to thank all those involved in producing this report in such difficult circumstances and hope it reflects the breadth of impact Thera Group continues to have in the lives of people with a learning disability.

Jenny Garrigan

Director, Thera Trust

Social Mission



mission

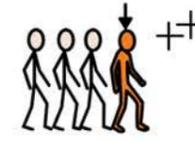
Our social mission continues to be to work closely with and for people with a learning disability to empower them and support them to lead full, productive lives, and support them to have control of their own life.

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 the 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

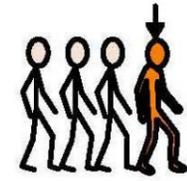
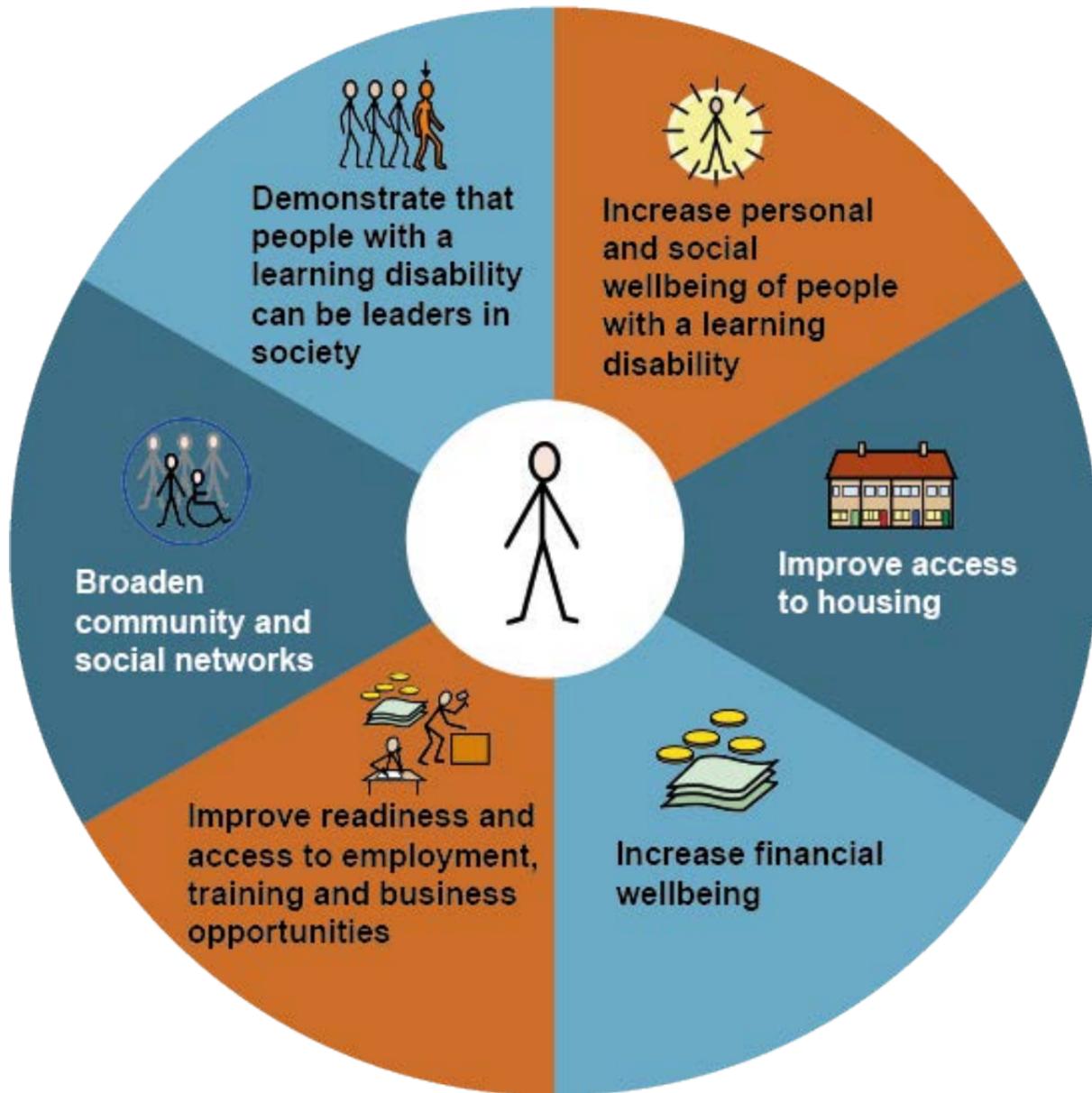
Motivated, well trained, experienced leaders and staff, who are experts in their field	Full and equal integration of people with a learning disability within the governance of Thera and its teams	<ul style="list-style-type: none"> People with a learning disability are Company Members, Company Directors 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> People find housing solutions meeting their complex needs 	Improve access to housing
	Financial advocacy	<ul style="list-style-type: none"> People have choice and control over personal money 	Increase financial wellbeing
	Employment and training programmes	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> People reduce reliance on paid support People have greater social opportunities and develop friendships 	Broaden community and social networks

Our Impact at a Glance



outcomes

Our Theory of Change (page 9) 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 2019 to March 2020.



leadership

People with a learning disability can be leaders in society

12

paid leaders with a learning disability

7

voluntary directors with a learning disability covering 44% of our boards

63

Company Members with a learning disability

30

staff with a lived experience of learning disability employed by The Quality Company - increased from 26



well-being

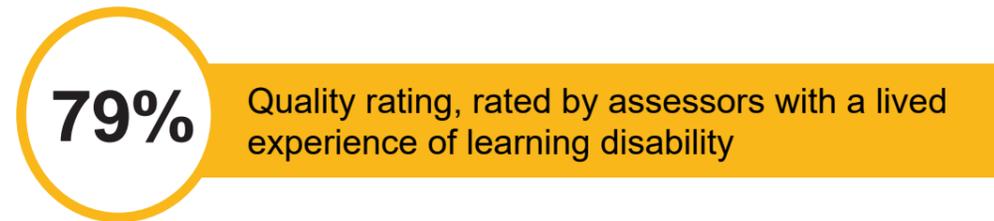
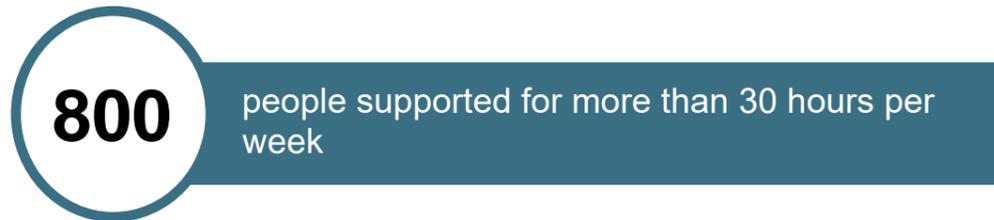
Increase social and personal wellbeing of people with a learning disability

Sample study of 2,144¹ of 3,300 people supported. Within this sample:

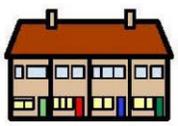
501

people have behavioural support needs

¹ this figure represents people supported by Thera's care and support companies only - excluding excludes excluding Dosh, Equal Futures, Unity Works Social Enterprises, The Quality Company, Forward Housing and other projects such as Gig Buddies, who are referred to separately in this report

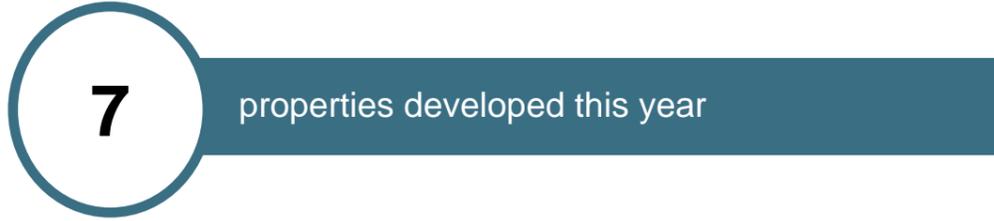
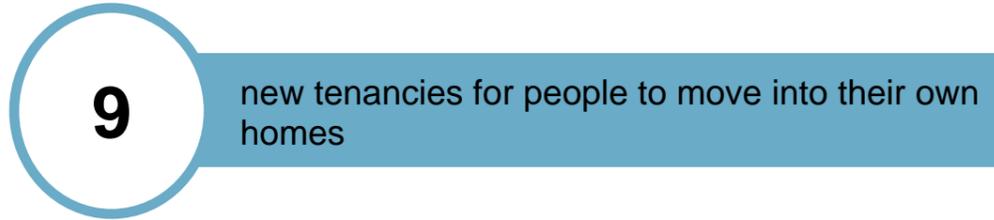


People with complex behavioural support needs have as good support from Thera as our broader population.



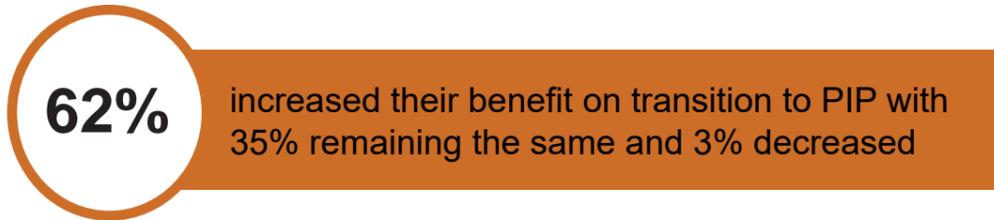
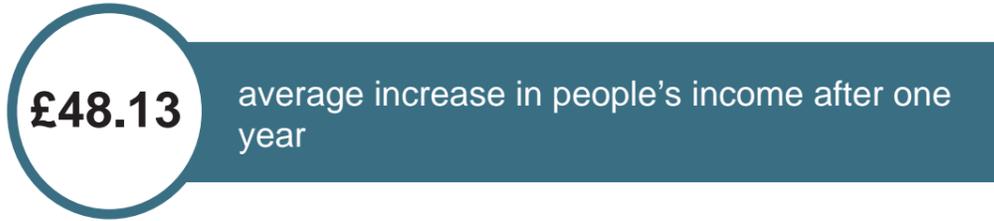
housing

Improve access to housing



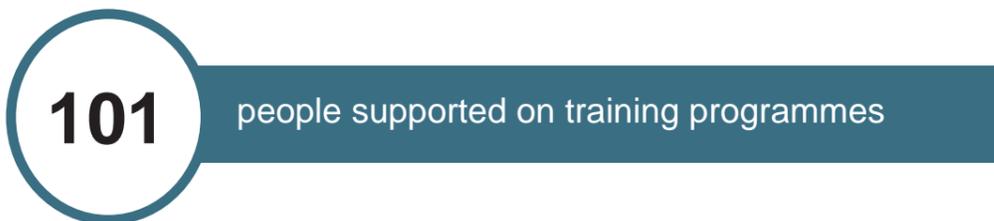
financial

Improve financial wellbeing



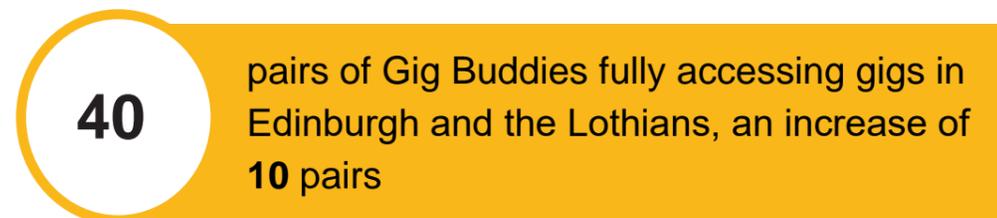
employment

Improve readiness and access to employment and training and business opportunities





Broaden community and social networks



community

Our Approach



leadership

Leadership by people with a learning disability

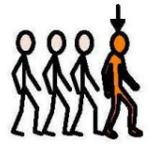
The key to our impact lies in the way we do things. As set out in our vision (see box on page 16), we want to lead by example to demonstrate that people with a learning disability can be leaders in society.

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

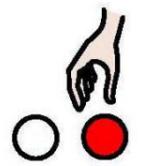
Thera will be controlled by people with a learning disability.



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 fifth Social Impact report. To ensure that we measure the social impact of the breadth of activity we undertake, we have continued to use the Theory of Change developed in 2014/15 that had minor amendments made to it in 2018.

However, we are aware that our Theory of Change requires a full and detailed review to ensure we are moving forward with our impact management and collect the most relevant data to provide the information we require, whilst continuing to focus on the areas of impact measurement and management we feel are both key and generally not widely evidenced in social care.

It is likely to be a two-year programme of review, to undertake this further development, as we add additional resources to support this change i.e. information management resources and further related systems development whilst also fulfilling our commitment to recruit a dedicated lead in impact management for Thera Group.

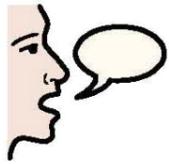


data

Data collection and measurement

We continue to collect the full range of data required of a provider of regulated social care activity to and with people who have a learning disability. We have continued to develop and improve the effectiveness of our data collection and better resource the team who manage this. We have a clear strategic plan to continue this development.

This both serves our performance management and impact management needs. We measure our input, output, and broader outcomes to inform continuous improvement, management decisions and our strategic and annual planning. We remain sensitive to the very personal nature of what we do and remain true to ensuring it's our performance we are measuring and not that of the people we support.



reporting

Reporting

We remain committed to taking a step back annually, scrutinising and reporting on our impact and taking the opportunity to share our achievements and challenges with our investors in Thera's charity bonds, recognising this report as a true celebration of the achievements of the people we support and their teams.



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

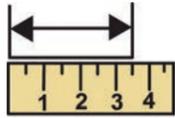
What impact do we measure?

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 people with a learning disability.





measure

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 Assessment reports carried out by our Assessors with a learning disability - measured against Thera's quality standards.
- **Annual Customer Satisfaction surveys** by Dosh - measured against the Dosh Promise and key indicators.
- **Project specific surveys** as needed.
- **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



impact

In this section we walk through, in more detail, our impact across each of our impact goals and areas of activity. This will include a mixture of data and stories² to illustrate the changes we have seen:



People with a learning disability can be leaders in society

- > Employing leaders with a lived experience of learning disability
- > Company Membership



Increase personal and social wellbeing

- > Individual Care and Support



Improve access to housing

- > Forward Housing



Increase financial wellbeing

- > Dosh Financial Advocacy

² Individuals' names are included where they have given consent for this. If they have not given consent to use their real name a pseudonym has been used. This is shown in inverted commas e.g. 'Joan'.



Increase readiness and access to employment, training and business opportunities

- > Unity Works Social Enterprises
- > The Quality Company
- > Employment opportunities in East Anglia
- > Supporting entrepreneurs: Dolphins' Den



Broader community and social networks

- > Equal Futures
- > Gig Buddies



People with a learning disability can be leaders in society



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

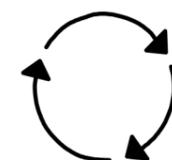


employment

Employing leaders with a lived experience

The embodiment of Thera's Vision is the equal leadership team in Thera Trust, the charity and parent company. This includes a paid director with a learning disability, Matthew Smith, 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.



sustained

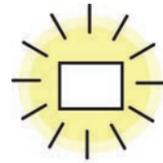
Sustained employment

We have 12 leaders with a lived experience of learning disability, representing **37% of our paid Executive Director roles**. This is a 3% reduction due to:

1. The development of new companies in the Group which included an additional specialist company.

- Change from permanent single post in Thera Trust Learning and Development team to drawing on expertise of the Head of Development (with lived experience of learning disability) and co-opting others who also have this lived experience.

All of our leaders are experienced in their roles with a range of service from three to thirteen years.



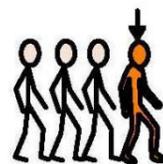
new

In addition, our latest Service Quality Director recruit is Jordan Allan, who took part in a workshop/assessment centre and interview in February 2020, just before the COVID-19 pandemic emerged. This meant we had the opportunity to meet and explore fully Jordan's talents and fit to the role.

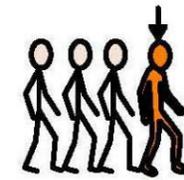


We had delayed Jordan's appointment, but as it became clear that the pandemic wasn't going to have just a short-term impact, we agreed that he start in May 2020 in his role with Thera (Scotland). Jordan is skilled and experienced in the use of IT and video conferencing which has been an asset. He has also been in the perfect position to share his experience of a "digital induction" and working at a distance, offering advice to the Directors of Quality and Involvement on recruitment and support to new directors through this challenging time.

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.



leadership



leadership

Building on our leadership approach

As planned, we embarked on a mission to fulfil a co-chair arrangement for Thera Trust board. This structure was developed following the resignation of our Chair last year after over 14 years' service to the Group as both a non-executive director and latterly as Chair.

Having reviewed the skills, knowledge and experience we were seeking now and for the future and having talked with several talented people, a co-chair approach became the obvious way to meet these requirements.

We were delighted to bring on board Michelle McDermott and Sally Warren and later in 2020 they were appointed as the new co-chairs.



Michelle

Michelle brings her lived experience of learning disability to the role as well as her experience of supporting adults with a mild to moderate learning disability.

Alongside her role at Thera, Michelle also works at Paradigm as Associate Co-Facilitator, at Generate as a Co-Trainer for the Easy Health project and at Books Beyond Words as a Facilitator.



Sally

Sally is the Managing Director of a national training and development agency working to ensure people with a learning disability and/or autism are supported to live good ordinary lives.

Sally is driven by the desire to ensure that each and every individual is supported in a way that is right for them and that the values of this underpin the integrity and business approach of organisations offering support.

Also, later in 2020, we recruited to the Executive Chair position in The Quality Company. A post held by a person with lived experience of learning disability. More detail of this appointment will be given in our next report.



promote

Promoting the leadership model

In February 2020, Matthew Smith and Jenny Garrigan, Thera Trust Directors of Quality and Involvement, alongside Edwina Turner, solicitor at Anthony Collins, ran a workshop on Thera's leadership model at the annual Learning Disability England conference.

This was an opportunity to promote leadership by people with a learning disability and demonstrate that this can be supported through legal structures. It also presents an opportunity to show how the impact of Thera's leadership model works both legally and practically.



recognise

Recognising our leaders

2019 has been another year of success where our leaders with a lived experience have been nationally recognised. Andrew Bright was awarded 4th place in the Shaw Trust Power 100 list³. This is an amazing achievement to be listed amongst the most influential people with a disability.



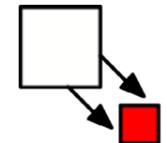
3 The Shaw Trust Power 100 is an annual publication containing the 100 most influential disabled people in the UK About - Shaw Trust Disability Power 100 List



membership

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 their Thera company. Company boards are accountable to their members.



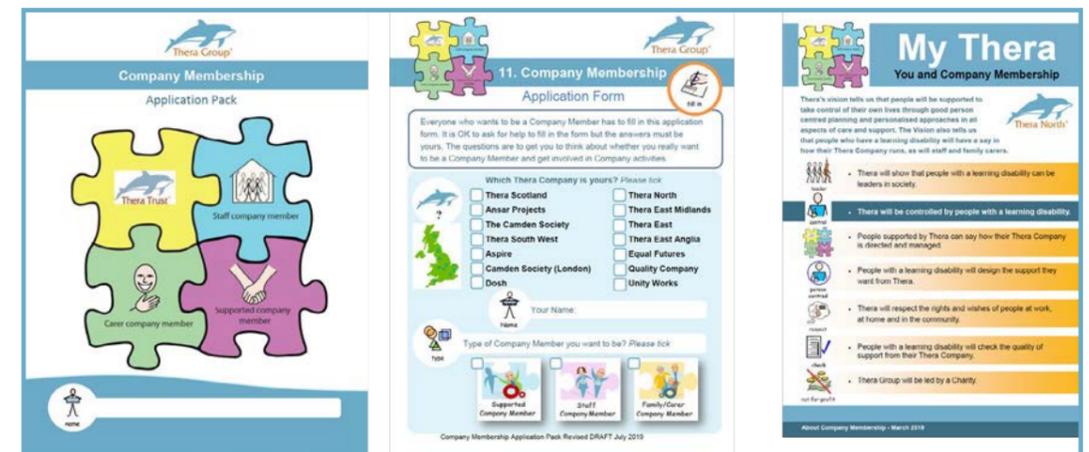
reduction

Statistically we have seen a reduction in the number of company members across the Group. This is, in the main, due to a change in company structure of The Camden Society – being developed into three separate entities. The 20 company members of the original entity affiliate themselves more to Unity Works Social Enterprises and have, as yet, not formally become members of this company.

We are also aware that the Quality rating for Controlling Your Thera Company has reduced by 11%. Exploring this with Service Quality Directors, this has proven to be an anomaly, as in many cases it relates to audits of people who are Company Members and are active in the events and meetings that take place.

It is thought that people are expressing themselves in these forums, but possibly don't relate to a question or discussion about membership when they are not in that environment. Consideration needs to be given on how better to measure impact in this area of activity.

Following the review and revision of the accessible information on membership, Service Quality Directors have been using these new tools to promote Company Membership and encourage more people to become members.





attendance

Attendance and impact of Annual General Meetings is continuing to develop with Service Quality Directors reporting that Supported Company Members are more actively involved and are building confidence to input to meetings.

“At the AGM last year, I felt members were much more involved. Some staff members contributed to the Managing Director’s report and a number of people supported were encouraged to talk about the support they received. This made it much more inclusive.

We also welcomed ‘Joan’ as a Company Member this year. Fellow Company Member ‘Sharon’ supported ‘Joan’ with her first AGM, went through the rules and explained what to expect. ‘Sharon’ shared a personal story at the AGM and encouraged ‘Joan’ to do the same. This has helped ‘Joan’ to build her own confidence.”

Helena Frewin, Service Quality Director, Thera East Midlands



director

It is clear that where there is an Independent Director appointed to the board by the Company Members, the membership is more active and has a continued voice at the board throughout the year. David Parker and Sam Holman tell us more about this:

“Working with Andy Feather, Independent Director has really helped us develop new ideas and ways of working with our Company Members. His enthusiasm and desire to get involved has been brilliant.

Andy has made a point of meeting many people we support and their staff to understand the issues they face. He wants to make sure people’s voices are heard and has initiated several surveys and questionnaires among the members which then feed into the Thera East Anglia Board’s Company planning process.”

David Parker, Service Quality Director, Thera East Anglia

“Our Independent Director Graham Belgium, became actively involved, having explored what increasing our numbers of Company Members would mean for Thera South West and how Graham could, on behalf of the Board, give direct support in what we do.

Graham was keen to support me to achieve increased membership and this began by putting together a new approach to recruiting new members... This included different ways of contacting people and talking about Company Membership and organising Thera South West Fun Day event for people supported, their families and friends and our staff.”

Sam Holman, Service Quality Director, Thera South West



inclusion

Many of the companies can demonstrate their inclusive approach to liaising with Company Members in words and pictures:

Following their Care Quality Commission Outstanding rating, the Thera East Anglia executive team worked with Company Members at their regular meetings to contribute to their 2020/21 plan “beyond outstanding”.



AGM

In preparation for their AGM, the Independent Director facilitated a meeting to enable members to prepare questions to put to the board at the AGM.



mapping

Thera North held Community Mapping events as a way of bringing Thera’s Being Heard Strategy to life and making Company Membership real – these events provided a meaningful way for people supported by Thera North and those signed up as Company Members to influence their Thera North Company.

The ideas and issues raised from these events have been written into the Company Annual Plan and have influenced Our Futures Strategy 2019-2024, forming the basis of Thera North’s “4 Big Ideas”.



Increase personal and social wellbeing



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



well-being

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 (as it is not for us to dictate expectations or timescales or to judge them against our standards). Rather, we measure 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 which people with a learning disability find particularly difficult to access i.e. appropriate housing, personal money management, employment and training and developing friendships and relationships.



support

Individual Care and Support

The impact results presented here, in relation to direct care and support activity, are based on an update of support carried out with a sample group of **2,144** people out of a total of almost **3,300** who have received support through 2019/20.

Among them **800 people have been supported for more than 30 hours per week including 501 with complex behavioural support needs⁴.**

Thera has continued to compare, against our general population, our impact results for our support to people with complex behavioural support needs⁵, as it is nationally recognised that they are at greater risk of poor support⁶.

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 alongside anonymised evidence from Person Centred Planning using the online tool iPlanit. These offer a means of comparing current results with those of last year and carrying out a comparison of support for people with complex behavioural support needs against that of Thera's wider population.

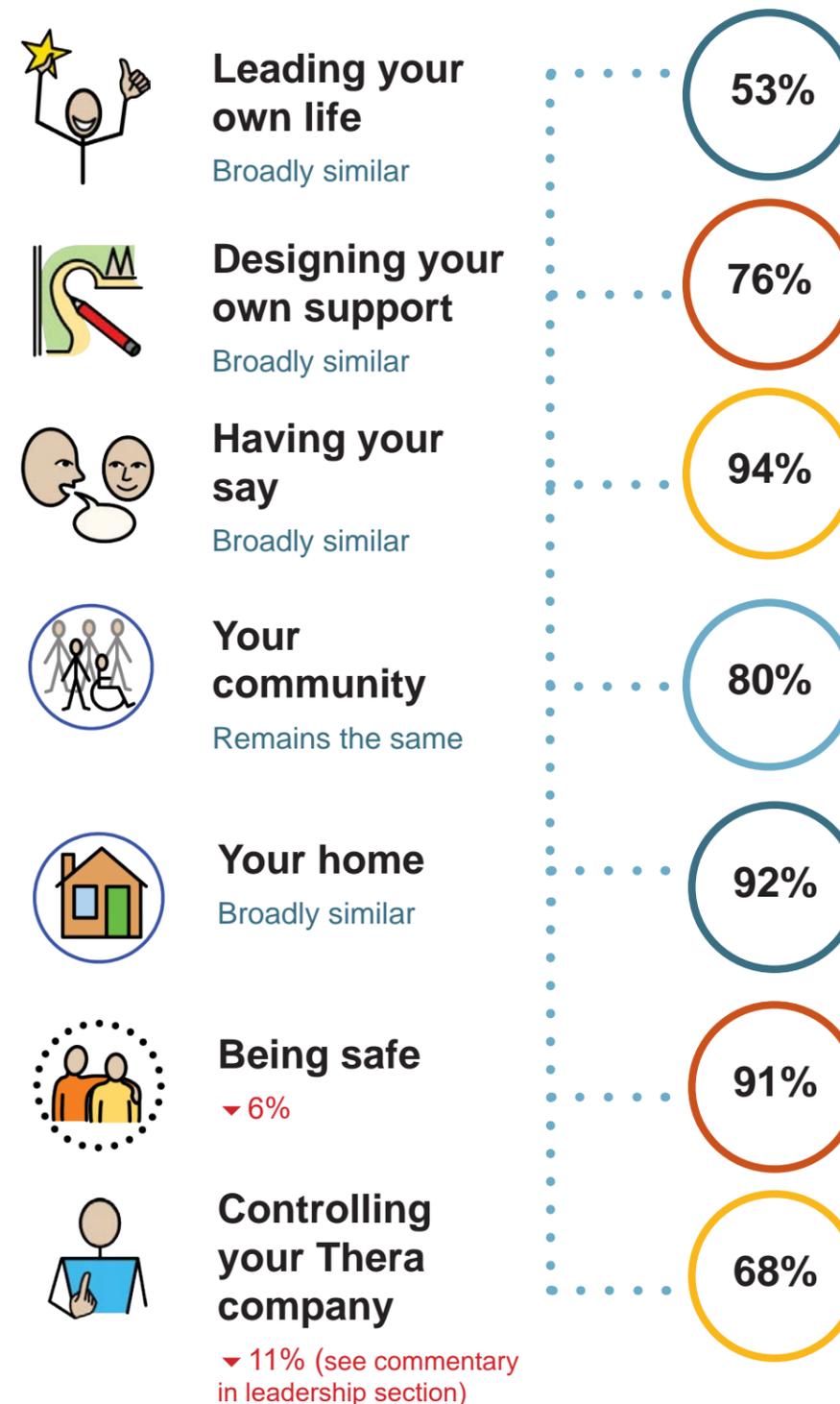
⁴ This figure represents people supported by Thera's care and support companies only - excluding Dosh, Equal Futures and Unity Works Social Enterprises who are referred to separately in this report

⁵ 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

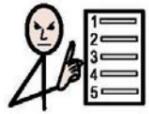
⁶ Sources: Department of Health Winterbourne View Review: Concordat: Programme of Action, 2012 Winterbourne View – Time for Change, Sir Stephen Bubb, Nov 2014; Time for Change – The Challenge Ahead, Sir Stephen Bubb, Feb 2016; NHS England Transforming Care for People with Learning Disabilities – Next Steps NHSE et al, Jan 2015



Overall quality rating, as determined by Assessors with a learning disability: **79%**

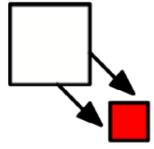


For people who have complex behavioural support needs, overall quality is assessed at **79%**



standard

Working with Service Quality Directors in the Group, The Quality Company have reviewed the Quality Standards and pulled out health related areas from existing standards to create a new and focussed Health and Wellbeing standard for implementation from April 2020.



reduction

Last year, we had seen a reduction for the standards of 'leading your own life', 'designing your support' and 'your community' for both cohorts of people. This year has seen a plateau in this trend.

Whilst we would have hoped to see an increase in these ratings, we have continued through 2019 to have barriers to Assessors easily accessing people's iPlanit with them should they choose. In some cases this is due to a lack of personal devices.



project

This was anticipated and as part of a wider project aiming to improve the way the organisation collects, stores and analyses information around the person, a pilot has been undertaken in one subsidiary company to test the viability of several technologies. Ultimately this will support better access by people supported and those around them.



IT

The pilot itself is yet to be fully evaluated due to changing priorities as a result of the COVID-19 pandemic in the last quarter of the year. However, enough information has been gleaned to date to create a specification for the mobile tablets and the IT support required for users of the systems and technology and scope the investment required.

The 6% reduction in percentage to 91% for 'being safe' appears to be attributed to more thorough questioning by Assessors as evidenced by sampling assessment reports. This is being closely monitored.



outcomes

However, looking at the anonymised data from the sample group of people using iPlanit, as last year, we can see that outcomes around lifestyle and independence which cover the above areas assessed by the Quality Assessors, remain consistently the highest number of outcomes achieved.



In more detail, the iPlanit outcomes being worked on are in a range of activity areas that are of similar importance for people with complex behavioural needs and those of our broader population:

- Feeling good about myself
- Making decisions in my life
- Being active in my local community
- Trying new things
- Communicating with people
- Being active
- Building relationships
- Doing more things for myself



results

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.**





thank you

A parent nominating a team from The Camden Society, quoted a long Thank You list to individual staff and the team for supporting their daughter with a range of activities from the day-to-day, to hobbies, physical exercise and health and wellbeing activities:

“Thank you to all the staff for their work recently. ‘Tracy’ is obviously so happy and is having the opportunity to do so many different things which are all enriching her life and increasing her independence ... this is allowing me to step back a little more with that side of things and be able to spend time with ‘Tracy’ and do fun things instead.”

Mother of person supported by The Camden Society



story

Julie

Julie lived in a residential home and had full support with all areas of her life. When that closed, Julie moved into a house with two other people.

Julie’s support team felt she “came on leaps and bounds” whilst at that property, she started cooking her own meals, having greater access to the community and she was able to see her friends more often as she was in walking distance to their house. Julie also had total control of how her bedroom was decorated.

It was during Julie’s annual Person-Centred Planning meeting that she said she would like to become more independent and move to a different house with less support.

Staff supported Julie to make this happen and she moved in with two other people. Although Julie enjoyed her time there, she still felt she would like greater independence.

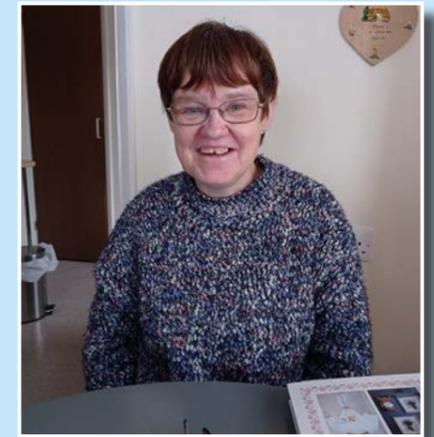
Julie was supported to move again, this time to a one bedroom flat in a warden block of flats. Yet again, Julie amazed us all with her developing life skills.

Julie now has total control of her money and has developed excellent budgeting skills. She plans her own household chores, completes her own washing and cooks her own meals. She has purchased her own mobile phone and got the internet. She regularly books taxis independently to visit her family and friends.

There is a great sense of community in the building with residents meeting up for chats in the community room.

Julie’s support staff said “this goes to show how the right environment, housing and support can improve a person’s life beyond all expectations!”

Vanda Jackson, Community Support Leader



support

Following many years in a long-stay institution, in the autumn of 2019 ‘Mary’ started being supported by Thera East:

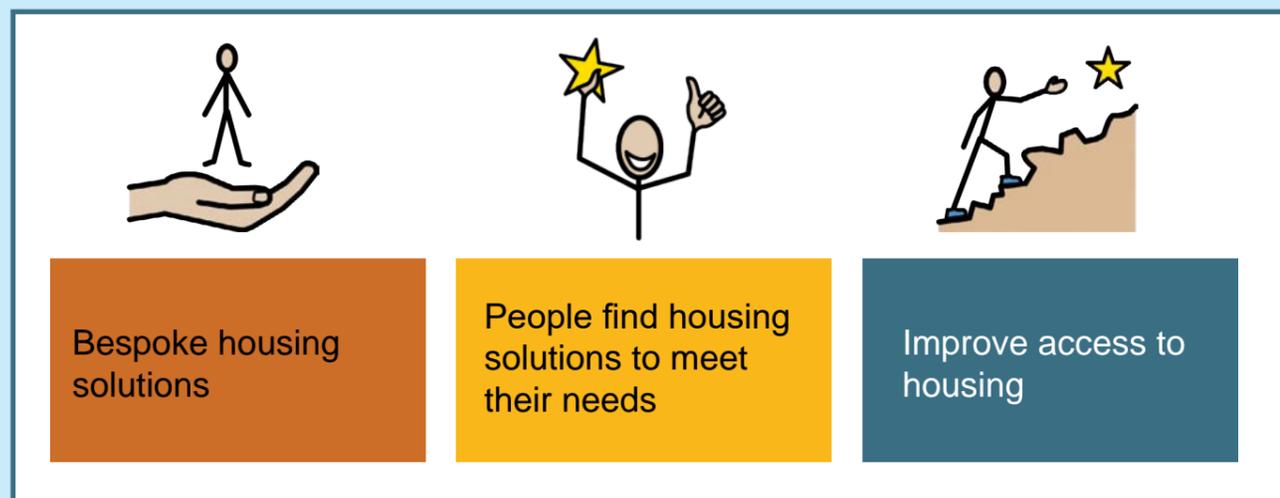
“Since ‘Mary’ has been in her own home she has thrived. She has learned how to socialise, how to be a part of the community and how to carry out daily household tasks. She is comfortable and happy.

She is vocal about her wants and needs without being afraid. She is reassured by the fact that her amazing team understand her and have the patience required.

‘Mary’ feels safe and secure with the team working with her and she trusts them. It shows. I could never thank the team enough. When I say they saved her life, I mean just that. Thanks to Thera, my sister has an opportunity to live a happy life rather than just exist.”

Sister of person supported by Thera East

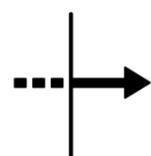
Improved access to housing



housing

Forward 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.



continue

Continuing to deliver

As a long established member of the Thera group of companies, Forward Housing continues to work in close partnership with Thera companies, local commissioners, the people supported and the people who know them best, such as families or advocates to deliver bespoke housing solutions. **7** properties have been developed this year, creating **9** new tenancies for people to be supported to move into their new homes.

Through the length of this programme **156** tenancies have been developed so that people can achieve a tenancy in their own home.⁷

The living environment, location and design of each new development is designed to reflect the specific needs of the individual or individuals who will be living there.

⁷ Some calculation methods for the housing data have been updated this year and this is part of an ongoing review. This year's numbers therefore currently reflect the number of available tenancies (not the total number of people that have lived in those homes). Some review of dates for property purchases has also moved some to earlier periods, meaning the 2019-20 total is lower, and giving a revised total over the length of the programme.

Our remit is to enable people who have a learning disability to access bespoke accommodation that supports them to live independent lives in their home communities, either on their own or with friends.

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. Our track record shows that each person has the ability to live independently with the right level of support, regardless of the complexity of their needs.

Key to achieving that, is designing a home that is tailored to meet their specific support needs. Each home move is individually managed in collaboration with the individual, their circle of support⁸ and support provider to incorporate each person's needs and choices for location, layout, design and decoration.



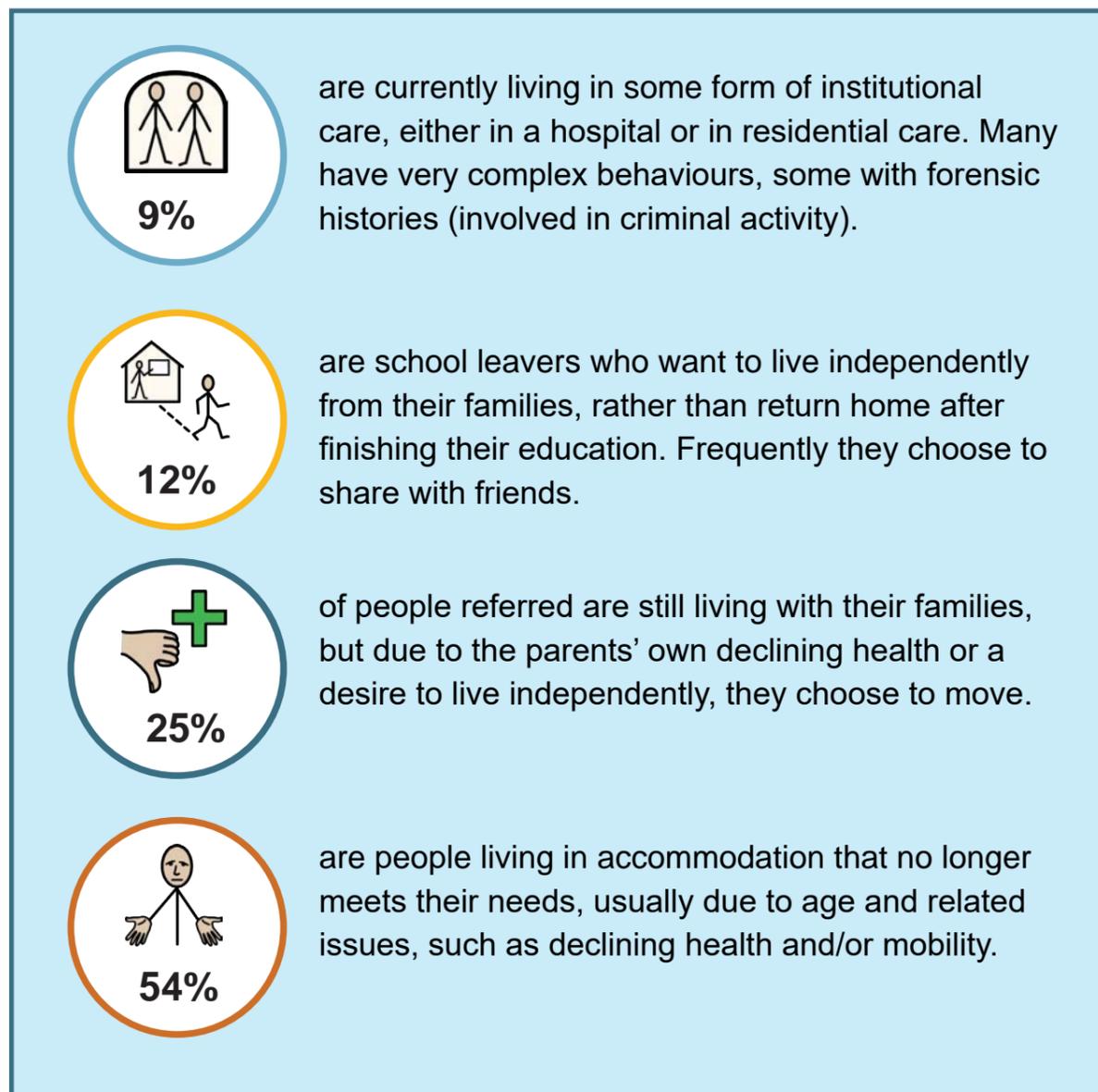
improve

Improving access to housing

The profile of the people who are referred for housing remains broadly consistent, generally comprising of people who have complex physical disabilities requiring aids and adaptations to the property and/or complex behavioural issues that need an individually designed, bespoke environment (for example low stimulus in a quiet location).

⁸ the people that are important in a person's life e.g. their family, friends, advocate, support provider and others.

Of the referrals received in the last year approximately:



Reflecting and learning

Each new development over the year has offered the opportunity to learn what has worked well and what needs to improve.

The Housing Needs Assessment (HNA) that is the cornerstone of all new developments continues to be reviewed regularly and modified as needed. We have also introduced new Sign Off meetings for the HNA using online conference calls involving Thera support companies and Forward Housing, in partnership with Empower Housing Association, to drill down into the detail of what is needed.

As demonstrated this year, there is an increasing number of single person developments being requested by Local Authorities who understand that standard 'off the peg' housing solutions will not work, due to the complexity of individuals' needs.

These developments are more expensive to deliver so we have negotiated with Cheyne a dedicated funding stream for single person schemes.



Impact of COVID-19

In addition to our learning over the length of this project, 2019/20 has posed unique challenges not encountered before, with COVID-19 impacting on the development programme in the last quarter of the year. New protocols had to be developed and the lessons we have learned will provide a template for any future disruptions. For example, we have learned to make greater use of IT to maintain regular project team meetings between the key partners involved, not just within the Group, but externally.

The inevitable disruption to the development programme effectively postponed those developments that were due to be completed in the last quarter of the year, with contractors unable to work on site and tenants unable to move into their new homes. The impact will be felt into 2020/21 as even after the first lock down was lifted, delays in the supply chain meant that our contractors struggled to source materials, resulting in further delays. Key to overcoming this was keeping good lines of communication open between all the stakeholders i.e. Forward Housing, Empower Housing, Thera companies and contractors.



story

Glenn

We worked with Glenn and his advocate to decide where and what kind of home he wanted to live in. Glenn wanted to live in a specified area and near trains and buses so that he can get out and about easily. Glenn also needed an accessible flat as he is partially sighted, and consideration needed to be given to getting around safety due to the possibility of epileptic seizures.

Glenn moved into a ground floor flat in early 2015 and really enjoyed living there as it was everything he wanted at the time. He was able to go to the shops and travel around easily on public transport.

However, over time, Glenn's needs changed. Glenn and his Circle of Support decided that his environment did not meet his needs anymore. Glenn needed a new home.

His support team worked with Glenn and his Care Manager to fill out a housing needs assessment, to enable Forward Housing to begin finding a suitable property. We clarified that it would be best for Glenn to move into a detached bungalow in a peaceful area to give him the quiet environment he needed. We worked with Forward Housing to find a property that matched Glenn's preferences. The property was modernised to meet his needs before he moved in.

Glenn decorated his new home to his own taste. He picked his own green-orange-mustard striped wallpaper and chose sparkly copper coloured kitchen utensils.

In the 5 days leading up to his move, Glenn went to his new house every day. On one visit, he had a cup of tea and biscuits in front of his new fireplace. From the moment he set foot in his new house, he seemed at ease and looked as if he felt at home.



On moving day, Glenn went on a day out while his things were moved to his new home. When he arrived, he took his coat off and looked around the bungalow by himself.



story

His team manager Yvette asked him if the staff team have done everything right and Glenn said, "Yes, thank you." "Is there anything else I can do?" Yvette asked, to which Glenn responded, "No, thank you. You can go now".

In the days following his move, Glenn walked around his house and regularly told his support team, "It's nice my home, isn't it?"

Staff said, "Glenn is really proud of his home. He tidies up, which he never used to do. He looks different; he has the peace he has wanted for years."

"Glenn is now gaining confidence again. He is choosing to go to new places and for longer. He had rarely chosen to go on days out over the past two or three years as he felt too stressed in his old home. He has recently started choosing flowers for his garden and will have a strawberry patch as he loves strawberries."



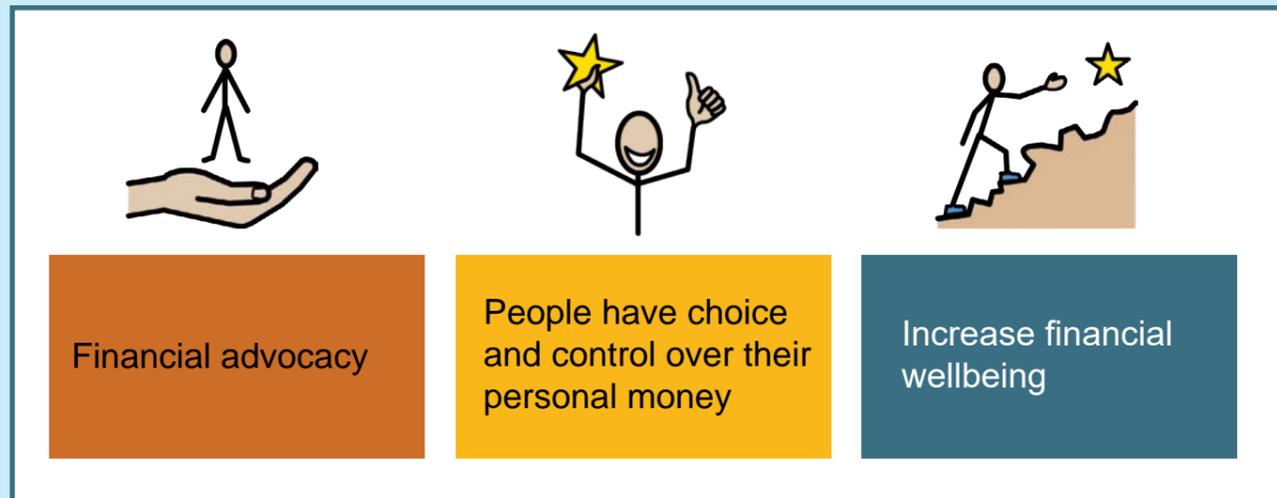
"I have known Glenn for 10 years and this is the first time I have seen him this way. He has taken ownership of his new home and he is doing more for himself. He wants his home to be his; he is the master of his home. He is happy."

To date, Glenn's taken control of his life in a way that his support team had not anticipated, he is showing confidence and is enjoying keeping his home tidy, clean and homely. His health has vastly improved - with only one slight illness that was managed and sorted quickly. The 1-1 support from the staff team continues to provide a really solid base for Glenn to grow into his next chapter.

Matt Congdon, Operational Manager, Yvette Vond, Community Support Leader and Petra Patty-Bradley, Project Manager

We publish this story in memory of Glenn, who sadly passed away in February 2021 just as this report was published. Our condolences go to his family, friends, support team and all those who were part of his life.

Increase financial wellbeing



finance

Dosh Financial Advocacy

Dosh provides financial advocacy and appointee services to people with a learning disability and its mission is to support people to have more control and independence over their money.

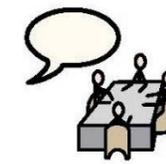


promise

The Dosh Promise

The Dosh Promise is a list of standards that say how we will support people, based on what the people we support told us they want. We used The Dosh Promise in 2019/20 to check that we are supporting people well.

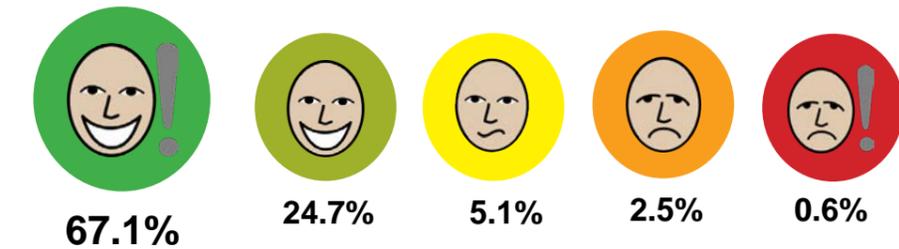
- ✓ I will be able to use my money to do the things I want
- ✓ I can be as involved as I want in my money
- ✓ I will spend my money in the way that I want
- ✓ I will get the information I want about my money in a way I can understand
- ✓ I will have my own Financial Advocate who visits me, knows what 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



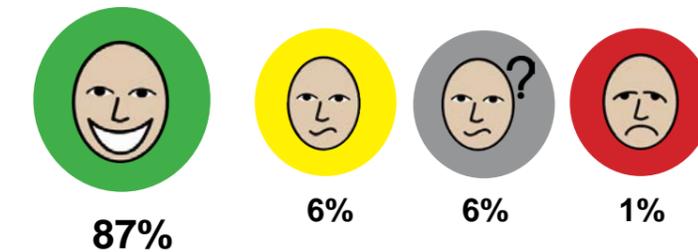
feedback

The Annual Review survey for 2019/20 showed a **92%** approval rating:

How happy are you with Dosh's support?



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



Income and savings outcomes for referrals made between April 2018-March 2019 (12 months on: April 2019-March 2020)

	Average on referral	Average past 12 months	Total
<p>income</p>	£250.22	£298.35	£48.13
<p>savings</p>	£8,016.42	£12,056.84	£4,040.42



impact

Impact through benefit changes

Many people supported by Dosh have moved disability benefits to Personal Independence Payment (PIP). Dosh completes this on their behalf, with support from those that know them well in their day-to-day lives.

We continue to see strong results from our PIP applications. This means that people we support continue to have a good income and access to support, such as Motability vehicles, that enables them to remain independent and use their money to do the things they enjoy.

Outcomes for Personal Independence Payment (April 2019 to April 2020):



application

128 total applications

116 decisions received
10 pending
2 support stopped during application



outcomes

72 increased

3 decreased
41 stayed the same



increase

£3,911.00 per week
average £33.72 per person

£203,931.27 per year
average £1,758.03 per person



story

'Amy'

One lady we support had for several years expressed the desire to own her own horse. Previously she had been told "no", which hurt her mental wellbeing and confidence.

As her new Dosh advocate, I got to know her and built up the relationship with her. I showed 'Amy' that I was there to support her independence. 'Amy' began to realise that Dosh is not there to say no, but to empower her to realise the consequences of this decision and commitment.

With her own weekly budget, Amy has arranged to "loan" a horse; she has found insurance and attends the stables twice weekly.

Her support team are blown away by her achievements. 'Amy' wants to show that this is a purchase she is committed to and we have every faith one day she will have her own horse.

Phillipa Gould, Financial Advocate



project

Projects

In early 2020, Dosh also completed the 'Your Money. Your Way' project that delivered money management and financial capability workshops to over 200 young people across the East of England.

This involved a series of 4 workshops (8 hours) to groups of people with a learning disability to give them budgeting skills and money awareness as they move into adulthood and prepare for more independent lives.

The workshops were funded by a NatWest Skills and Opportunities Fund grant and were very well received. You can read more about these in our blog here:

www.dosh.org/your-money-your-way-workshops/





story

'Peter'

'Peter' is 20 years old and lived in a supported housing project for young people. His goal was always to live by himself. He needed to save up money to do this.

Dosh worked with 'Peter' and his circle of support to help him understand budgeting and saving and develop better spending habits.

It has been hard at times – 'Peter' has had to choose between spending money on smaller things like takeaways and leaving enough for train trips (his passion), as well as the house move and he has not always managed to stick to his budget!

With the support of Dosh to help keep his savings safe, he managed to save up enough to move into his own flat. He is really happy in his new place and proud of himself for achieving his goal.

He has saved up and bought his own furniture and learnt budgeting skills. He knows how much he can spend at the supermarket each week and he knows he can still afford train trips.

Judy Krasker, Financial Advocate

Increase readiness and access to employment, training and business opportunities



Employment and training programmes

Support to entrepreneurs



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



employment

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.

Unity Works Social Enterprises currently works across the London boroughs with plans to scale up their offer UK-wide.

This review covers Unity Works' impact across its three main areas of social enterprise, employment and training.



opportunities

Social enterprises

Our Social Enterprises offer work experience and employment opportunities, including our apprenticeship programme.

These comprise:

- A range of cafes in local communities and workplaces, offering training to become baristas, chefs and front of house staff whilst offering healthy, affordable food.

- MailOut - a mailing and fulfilment service supporting a range of public, private and social enterprise organisations to handle large mailings. This offers training and a career in warehousing and customer service.
- Mill Lane Garden Centre, offering flexible training for people who enjoy horticulture or want to develop their careers in this sector.



closed

Café closures

Our main focus over 2019/20 has been moving our social enterprise cafes towards a more sustainable commercial model. Following the closure of two cafes during the year, we took stock of our methods of working and implemented a number of cost saving procedures with the aim to build a more sustainable future and working environment for our trainees and apprentices.

This, in turn, was reflected in the training we provided to trainees and apprentices. We focussed learning around portion control and customer service techniques such as upselling to reflect a real working environment.



cafe

Café Victoria

We opened our new flagship, Café Victoria, at the beginning of 2019/20. The café opened its doors to trainees in December 2019 and now has 4 trainees attending per week alongside a staff team of whom 50% have a learning disability. This is our busiest and highest profile site, located at Westminster City Hall, which gives us a fantastic opportunity to showcase the talents and drive of people we support and our staff, to Westminster City Council staff.

We also supported Westminster City Council with their supported internship recruitment and delivered 2 placements in Café Victoria over the course of the year.



story

Malik

When Malik first started his apprenticeship at Café Victoria, he was fairly confident working in a kitchen environment, as he had worked previously as a Kitchen Porter for another restaurant.

Although he was confident in the kitchen, he initially struggled with interacting with his colleagues.

Since starting his apprenticeships, Malik's communication skills have improved dramatically - he now feels confident to speak to and serve customers and he vocalises his feelings if he is unsure of an instruction.

Malik has also learned how to work and support his fellow apprentices. When another apprentice joined him in the kitchen, Malik went above and beyond to make him feel calm and comfortable.

Malik has taken on more responsibility as he has progressed in his apprenticeship. He initially started with prepping the salad bar which involved simply cutting up vegetables. He then moved on to making salads where we gave him ingredients with which to create them. He eventually progressed on to selecting his own ingredients which required him to think about balancing both flavours and textures and learning how to make food visually appealing to the customer.

Just before the COVID-19 imposed lockdown, Malik was starting to create his own recipes for soups and cooking food to order.

Malik is looking forward to finishing his apprenticeship and has aspirations to start his own catering business in the future!

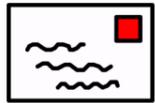




garden centre

Mill Lane Garden Centre

For the second year running, we worked with the local West Hampstead community through local fundraising initiatives and lobbying council partners to reject a direct competitor from selling Christmas trees in West Hampstead. This enhanced programme of community engagement supported us to exceed our sales targets over this period.



mail

MailOut

MailOut was successful in being selected to participate in the UnLtd Thrive Programme which provides specialist social enterprise business advice through workshops and individual mentoring sessions. We focussed our time on the programme to reviewing our systems to ensure they were fit for purpose.

Benefits of the programme included having expert support in developing a clear pricing structure and revised customer terms and conditions. This has helped us develop our customer base and the kind of businesses we can work with.

Our focus is now working with ethical social enterprises that match and complement our commitment to offering social value.



employment

Employment

Over the course of 2019/20, we refocussed our employer engagement on large employers to open vacancies and generate opportunities for people with a learning disability. This allowed us to focus on employers who have the largest recruitment drives and large HR and recruitment teams to facilitate job carving. We worked with upwards of 160 employers such as London Energy and Accor.



story

Carrie

Carrie Britton is Talent Executive Scripted, Drama and Comedy at BBC Studios.



We first met Carrie in 2019 after she attended an event with one of our other employers in her sector, who had employed one of our candidates and were celebrating his achievements.

Carrie is a senior businesswoman working at the BBC and reached out to us, keen to see what she could do to help to open up similar opportunities to other candidates, and we arranged some informal meetings. Carrie met 6 candidates and offered them interview skills feedback and advice, mentoring and networking opportunities, including sharing online profiles, CVs and complimentary tickets to career events.

Carrie has demonstrated amazing commitment to diverse talent, and during lockdown also attended our online disAbility Awareness Training. We are now looking at creating training that can be accessed by colleagues throughout Carrie's network.



employment

We have delivered **9 employment programmes** in 2019/20 with **390 entering paid employment** and **166 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 Anglia to develop employment services and training models
- Deloitte Mentoring Scheme

We have seen a large increase in numbers engaged with our employment programmes due to two large contracts awarded in Waltham Forest. There has also been a marginal difference in the numbers due to clarification in how the data is collected.



training

Training

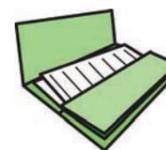
Awards Centre

In 2019/20, we had our largest ever apprentice recruitment to date. A total of 110 applicants applied for just 7 roles. Successful applicants started their programme in September 2019 and will graduate in August 2021.

101 people have been engaged in our training programmes with **88** working on accredited courses ranging from our apprenticeship programme to National Vocational Qualifications (NVQs).

A total of **67 learners attended adult community learning courses** funded again this year by Camden. We ran a total of 8 courses including Cook Together, Eat Together, a healthy food preparation course and Digital World, a course that promotes online and social media safety.

In January 2020, Justin Tomlinson, Minister of State at the Department for Work and Pensions (DWP), visited MailOut as part of a drive to promote accessible apprenticeships, facilitated by UnLtd and giving fantastic coverage on social media.



project

Autism Essex Programme

This programme, running from last year, ended in June 2019. A total of **34** engaged in the programme with **30** completing with action plans for the future.

Within the timeframe of the programme **18** people had job interviews and **3** successfully gained employment. **2** people gained work experience and **1** person started volunteering.



well-being

Health and Wellbeing

We have offered complementary health and wellbeing support to people we support looking to gain confidence to then start looking for and sustaining jobs. This year, we received a new grant from Transport for London to develop our popular walking group project which supports people to gain confidence and develop weekly routine and structure.



online

Online learning

Ongoing work with the accessible technology app How Do I? (a video-led learning tool that we've piloted across our social enterprises) has renewed our focus on using technology to enhance learning across our programmes. Since the beginning of lockdown in March 2020, we've used Zoom to facilitate remote learning for our trainees and job seekers.



quality

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.



workforce

Our workforce

The Quality Company **employed 30 people with a learning disability** at March 2019. This is an increase of 1 from last year.

In our last report we talked about the results of a survey of our staff who have a learning disability and the impact their employment has on them. This year we asked one of our staff to tell their story:



story

'Brenda'

'Brenda' had been employed by The Quality Company as an Assessor, with a lived experience of learning disability, in the west of England for over 6 years. She was looking for a new supporter.

A Quality Supporter is someone who works closely with an Assessor to enable them in their role. Each Supporter's role is different and tailored around the needs and skills of the Assessor. They work with the Assessor to undertake their Quality Checking, and also work with the Assessor in the areas they are looking to develop in.

The Quality Company and 'Brenda' had been searching for the right Supporter for some time. During a Quality Check 'Brenda' began talking to someone, 'Sharon', and explaining her role. 'Sharon' and 'Brenda' made a connection and 'Brenda' asked if she would be interested in supporting her as a Quality Supporter.

'Sharon' applied for the role and was successful, but this meant a new challenge for 'Brenda'!



work

'Brenda' lived approximately 45 minutes from where she would carry out most of her work as a Quality Assessor. 'Sharon' lived locally to where they needed to work. Previous Supporters had lived near to 'Brenda' and they had been able to travel together to work.

They discussed their options and decided on a plan. 'Brenda' wanted to be more independent, she had already been using buses in her local area.

For 'Brenda' to be able to get to the area she needed to work it would involve a bus journey and a train journey. 'Brenda' and 'Sharon' set out a plan for 'Brenda' to be able to travel independently on the train.

'Sharon' supported 'Brenda' to organise a rail pass. They planned her journey times and looked at different ways of knowing where she was on her journey. 'Sharon' then supported 'Brenda' to practise the journey to gain confidence.

Over 2 months 'Brenda' was able to learn to travel independently by bus and train to the town and meet with 'Sharon' to carry out her role as a Quality Assessor.

Through her work with The Quality Company, 'Brenda' has gained more independence through being able to travel on public transport. This is not only something that will help her in her career but also in her personal life.

Each Quality Assessor and Senior Quality Assessor works an average of 66.78 hours per year. They are supported in their role by Quality Supporters.

This post is a challenging one to fill – finding people with the skills to work on an ongoing basis with someone with a learning disability, to be job coach, assistant and add their own skills to the partnership.



We have continued to struggle with recruitment to some supporter roles this year and filling additional vacancies. We have been able to share support to enable Quality Assessors to carry out their roles and are looking at more creative ways to provide this support now and into the future.

The impact of COVID-19 on our quality assessment work in the last quarter of the year has been catastrophic, as the restrictions in place immediately prevented our teams being physically present in the homes of people who are more at risk of the impact of the virus. This meant stepping back and planning a different and more virtual approach to assessing quality of support.

Our response and the work carried out as a result, will be reported on in the 2020/21 Social Impact report.



Employment opportunities in East Anglia

The My Way supported employment project is based in the area where Thera East Anglia works. Initially run for a year in 2017/18 to test our approach to offering employment opportunities to more people with a learning disability, this has continued to be supported by Thera Trust via a social investment grant, to work with the local authorities and other partners offering more projects to help people with a learning disability into employment in Cambridgeshire, Peterborough and Norfolk.

2019 was a year for exploring what “supported employment means to me”.



Supported Employment Pilot - Ely and March Cohort

Working within this ethos we were successful in securing funding to deliver a supported employment pilot project in two key locations identified by the Local Authority. The aim of the project was to offer employment support to people with a learning disability who may not meet mainstream employment support services thresholds.

We employed two job coaches for 6 months to work alongside our Employment Advisor to deliver this project and expand our reach for supported employment.

We now offer employment skills support to 16 people; an increase of 12 this year as 12 people from Ely and March joined us to explore opportunities and develop employment skills. Each person was identified as being “work ready” by Cambridgeshire in-house day services and/or local Care Managers. From August 2019 to March 2020 we worked with each person to develop their employability skills whilst building links within the community.

Within the employment project we not only had to support people to develop employability skills but work on soft skills such as time keeping, travel training and signposting to support groups for mental health support when additional support needs had been identified.

Each person who attended the groups completed a range of group exercises including:

- Mock interviews
- Online research into different companies and their ethos.
- Skill matching to job description/ personal specification
- CV writing
- Soft skills including what it means to be flexible, group work and public speaking

The 1-1 and group sessions were designed and delivered to meet people's individual levels of understanding. As a result, the original planned timescales were extended to meet the learning needs of the group.



allotment

My Way Allotment

The Allotment continues to grow and deliver fresh organic vegetables to the local church in Ely for their Lunch Clubs. Lunch Clubs are for any members of the community across the age groups and to date we have supplied a wide range of fresh vegetables including potatoes, carrots, pumpkins, onions and green beans to name a few.

Larkfield's Community café enjoy their weekly delivery and adapt their specials menu based on the vegetables we deliver. The children's centre also enjoyed their annual pumpkin delivery in October.

One volunteer has been spending her Time Credits⁹ earned at the allotment, on a trip to the local soft play centre with her niece and nephew.

⁹ 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." Source: <https://www.cambridgeshire.gov.uk/council/communities-localism/time-currency/time-credits>



young people

Young People's Team

This year, we started our work with the Cambridgeshire Additional Needs team who support young people aged 14- 25 with Education Health and Care Plans (EHCP).

The scope was to explore and deliver 1-1 bespoke employment support to young people who were unable to attend formal education and have employment goals identified in their EHC plans.

Each employment support package was designed to suit the individual's learning style and support needs. Up to March 2020 we have supported two young people via EHCP funding.



partnership

Further Partnership Working

Thera East Anglia linked with Prospect Trust to support one young person with her employment journey.

Prospect Trust will support the young person to gain practical skills within the new Ely Unwrapped shop while she works to gain a formal qualification.

Thera East Anglia's job coach will provide additional support with soft skills and seeking paid employment (on completion of her placement).



information

Developing Information Materials

With support from the Thera Trust Communications Team we developed supported employment handbooks for both employers and job seekers.

Each handbook gives the reader information about Thera East Anglia, what we do and how we can provide assistance to both employer and job seeker.



story

‘Lisa’

‘Lisa’, supported by Thera East Anglia community support team, started volunteering at a local food bank.

‘Lisa’ worked closely with the team to box up food parcels for families in need. She has developed several skills within this role, as well as building her self-confidence, including:

- Time keeping
- Record keeping
- Teamwork
- Following instruction from senior volunteers
- Travel training

By the end of 2019, ‘Lisa’ was travelling independently to and from the venue using public transport. By January 2020 she no longer required staff to support her and this has become an activity she carries out independently.

Feedback from her team has been extremely positive and ‘Lisa’ has struck up a very supportive and positive working friendship with a fellow volunteer. This has given her another positive influence in her life.

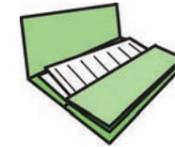
‘Lisa’ has said “I am proud of myself and am doing something that is helping others and it makes me feel good.”



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.



project

As reported last year, the source of funding for this project has come to an end and we are taking the time to pause, learn lessons from the project and redesign our offer.

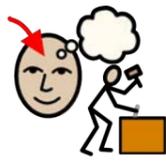
We have learned from our work with people with a learning disability through the life of Dolphins’ Den that some people who come to Dolphins’ Den with the aim of setting up their own business, might need some volunteering or work experience before they dive into setting up their own business. As a result, our plan is to develop a more holistic approach to working with individuals on Dolphins’ Den:

1. Get to know them, their dreams and skills better on a one-to-one basis
2. Map out the support they have around them
3. Support them to create a plan to achieve their dreams

From this, they will be better equipped to attend the workshops that are more focused on setting up a business and engage with the topics e.g. market research and marketing when they are ready.

It is our plan to work with the other resources and expertise available in Thera Group – in particular Thera East Anglia supported employment project and Unity Works Social Enterprises. We will build on the work that they are already doing to offer individuals who are budding entrepreneurs an opportunity to explore setting up their own business or community project.

In the meantime, we are also very aware that there are only two people within Thera at the moment who have run a Dolphins’ Den project from start to finish. We are working on putting a knowledge roll-out proposal together to ensure the sustainability of the project going forward.



training

Our plan is to train the Project Managers in Thera's Development Team, and any other member of the local operational teams who is interested, to run Dolphins' Den projects themselves in the future.

Alongside this, we are keen to refocus the central resource at Thera Trust to be an advisory body, providing training, guidance, collecting resources and organising learning network meetings between the projects running on the ground, so that Dolphins' Den can continue to develop and adapt to people's needs in the future.

Broader community and social networks



Community capacity building



People reduce reliance on paid support

People have greater social opportunities and develop friendships



Broaden community and social networks



community

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.



vision

Our Vision

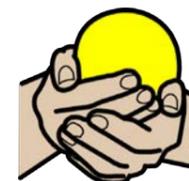
Everyone has friendships which are based on kindness, compassion and respect.



mission

Our Mission

To work alongside people with a learning disability or autism to reduce loneliness and social isolation.



values

Our Values

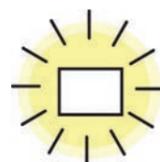
- We are committed to positive relationships.
- Making a sustainable difference.
- Social inclusion for everyone.



leave

Equal Futures has had a challenging year, with staff and leadership turnover. This meant less contact with some Circles than we would have liked and some long-standing Circles not receiving any.

With the support of Thera Trust Development Team, staff recruitment immediately commenced.



new

A new permanent leader also came into post at the end of 2020. Contact has been re-established and reset, with the focus into the future being on strengthening the circles of support and in parallel, further running the befriender support people like. The team are also receiving new referrals for support. This will be reported on in more detail in the 2020/21 report.

“I know in the past, Equal Futures has not done much for me, but on a positive note, ever since Caroline has joined, Equal Futures has been great, nice people, very friendly and very helpful and a great sense of humour. Getting on like a house on fire and getting to know the people and getting them to listen and to understand me. Always loving the chats and our walks. Equal Futures are the best. Thank you”.

Fiona Dawson, Focus Person

Currently all circles of support are Life-Long Circles. With the development of the new team, Smart circles, described in last year’s report will be further considered as an additional option offered to people.



volunteer

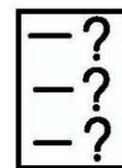
Equal Futures are continuing with the development of their volunteer strategy and have put in place many of the tools required to start recruiting to these opportunities.



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. We do this by running regular community based social events and by pairing our members with like-minded volunteers.



survey

In 2019 a study from Mencap¹⁰ found that 70% of adults with a learning disability said that they would like to get out more in the evenings.

46% said they didn’t have anyone to go out with, and 39% said that they are worried people might be rude or nasty toward them. Further to this, 8% of people said that having venue staff that understood learning disabilities would help them get out.

One of Gig Buddies’ key outcomes is for people with a learning disability to feel more confident in accessing social activities.

Gig buddies can help achieve this by enabling people to access mainstream, public events in their local area, not just events run from the ground up for people with a learning disability. Gig Buddies partners with a range of venues and arts organisations to offer social opportunities to our members.

“Hi everyone, I’d just like to tell you a wee story that Gig Buddies has changed my life around. I’d like to say how Gig Buddies changed my life of giving me that opportunity to become a DJ. I’m happy to be part of the Gig Buddies team. I’m glad I’ve made new friends.”

Chris McCaffrey (DJ Fireball), Gig Buddy

¹⁰ Mencap (2019) ‘Results Summary’ from Nightlife Survey, October 2019 via *People with a learning disability seven times as likely to be lonely this Christmas*, [online] <https://www.mencap.org.uk/press-release/people-learning-disability-seven-times-likely-be-lonely-christmas> (accessed 25/01/2021)



To help us reach more people, we have Gig Buddies Ambassadors. Cammy has been a Gig Buddies member in West Lothian for 3 years, he regularly comes along to our monthly Meet Ups and events.

Asking him to become a Gig Buddies ambassador was an obvious choice, he is a natural when it comes to sharing his enthusiasm for the project. Unfortunately, the country went into lockdown before we could complete our ambassador training but that didn't stop Cammy from diving into his new role.

“Just before lockdown I became an ambassador for Gig Buddies, it's been good, I've been speaking more about Gig Buddies and telling people about what I've been up to, and our events. Recently I spoke during a livestream on social media, and I was a bit nervous.

I'm looking forward to getting my ambassador training and becoming more confident speaking to groups. I've really enjoyed getting to know other people in the chats and events, we always have a laugh. I've even met people from Wales!”

Cammy Tweedie, Gig Buddies Ambassador



Our Gig Buddies project continues to grow, increase in capacity, and develop in terms of the support we can offer project members. In September 2019 we were successful in an application to the National Lottery Community Fund for 3 years of funding for a Glasgow based project.

We hired a local project coordinator and formally launched Gig Buddies Glasgow in January 2020 at a gig in collaboration with the UK wide celebration of grassroots music venues, Independent Venue Week.

Gig Buddies Glasgow has already established partnerships with many local venues, promoters, and organisations, including the SEC and Hydro, DF Concerts, The RSNO, The Glasgow Film Theatre, Last Night From Glasgow, Mugstock, SWG3, and Broadcast.



In November 2019 we were able to recruit a local project coordinator for our Gig Buddies West Lothian project, and after reporting on our previous three years of work in the area, were awarded a further 2 years of funding from West Lothian Council.

Gig Buddies with Thera Trust currently **supports 97 people with a learning disability** across Scotland's central belt. We have 61 volunteers at present, with 40 Gig Buddies pairings.

Two of our partnerships are with Independent Venue Week (a week-long celebration of independent venues across the UK), and with Edinburgh music venue Sneaky Pete's. To celebrate Independent Venue Week 2019, we teamed up with Sneaky Pete's to enable our members to get out to 5 gigs in 5 nights.

Richard had attended many Gig Buddies socials in the past, but this was his first time coming to anything held in collaboration with Independent Venue Week.

“I came along on Monday to see 'Makeness'. He was great to see. It was different to a lot of music I listen to, but I really enjoyed discovering new music. I'd never been to Sneaky Pete's before. It was a nice venue and the staff were very friendly.

The gig was very crowded, which I found a bit overwhelming. We were able to enter the venue before the main crowd which meant we could get some seats. This was very helpful. This was the first year that I've tried Independent Venue Week with Gig Buddies. Thanks for the opportunity to try new gigs!”

Richard Coxon, Gig Buddy



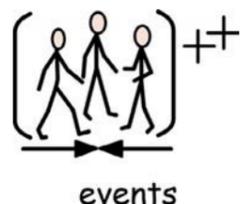
Encouraging people to have new experiences is a big part of the Gig Buddies ethos. Coming along to see the folk artist 'Brigid Mae Power' was the first time Bilal had attended a mainstream gig:

"I saw Brigid Mae Power, and Shredd. I liked them; it was a really good experience as it's bands I've never heard before. It was really loud, I had to wear earplugs, we got them for free by asking at the bar.

Brigid Mae Power was the first gig I'd ever been to. She was a really good singer; it was a great first gig. I'll definitely be going to more!"

Bilal Iqbal, Gig Buddy

Scott and Kerry are siblings who regularly attend events together. Due to their support needs they face a common issue for many people with a learning disability: their support finishes at 10pm and they're often unable to stay late at events. Coming along to a staff facilitated Gig Buddies social removes those restrictions and allows them to focus on having a great night.



"I really enjoyed it. I'd never been to that kind of gig before, it was all new to me. It was really loud, louder than I thought it was going to be, but that was alright. It was the kind of music I like listening to, banging drums and loud guitars. I'd really like to go to more gigs like that. I'd give the night 10/10."

Scott Ferguson, Gig Buddy



"I saw three bands. I really liked the headline act 'Mt. Doubt', they were really good. I liked the music they played, and the songs they were singing. I thought the venue was good, and I liked how it was all set out.

I liked that it was all standing, this meant that everyone could have a dance. I started feeling dizzy, but luckily there was a space for me to sit down.

It was amazing, it was so cool. It was my first time going to Sneaky Pete's and I'll definitely be going back!"

Kerry Ferguson



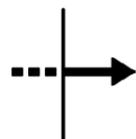
online

In March 2020, in response to the pandemic, we took the Gig Buddies project online and gave this the name: 'Gig Buddies: Virtual Insanity'. An online project allows us to continue connecting with our members and run virtual social events through platforms such as Facebook and Zoom.

The wider goals of our Virtual Insanity project are to keep people in social circles that they would otherwise not have access to due to the lock down. We aim to deliver a varied programme of events in place of our originally planned summer schedule and to connect members across the country, enabling relationships that previously were unable to be created due to a distance barrier.

We will tell you what we were up to through 2020 in our next social impact report!

Limits and Challenges



continue

We continue to measure and demonstrate our impact across a broad range of activities. There has, however, been a number of limits and challenges to reporting on and achieving that impact.



COVID-19

COVID-19

The emergence of COVID-19 in the UK, particularly from February 2020 and confirmation of the pandemic has clearly been a major challenge. In this last quarter, much attention was diverted to contingency and support planning and to ensuring policy and guidance was in place and kept up-to-date in an ever changing situation.

Some peripheral activity was therefore paused and there was a lag in the collation of some data. The organisation necessarily concentrated on ensuring good quality support to people, with our preparations for COVID-19. We also focused on the operational challenges for social care and specialist services for people with a learning disability and the impact on individuals we support and the staff we employ.

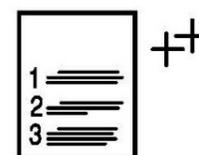


medication

Data Collection: STOMP

Teams continue to support individuals to access reviews of their medication in line with the STOMPwLD initiative (Stop Over Medicating People with a Learning Disability). We know this is happening at an individual level through the success stories that people celebrate.

However, we have not as yet set organisational measures to capture performance data at company and Group level. We plan to build this into our systems and processes better to capture information around the person, through a data review project beginning in 2021.



plans

Access to Information: Person-Centred Plans

There are access limitations to the online Person-Centred Planning (PCP) tool, because many people we support do not own their own IT equipment. This results in a reliance on the organisation's laptops, which are not always available to the individual at the times they would choose.

This year, Thera has therefore further invested c. £440K in IT. As part of Thera's IT strategy to build on and further develop systems and infrastructure to improve information management, there has been a pilot of mobile devices used by support staff. This should also support easier access to the online PCP tool and encourage further engagement and implementation. We are also exploring fund-raising to provide people we support with their own equipment.

Through this pilot, although yet to be fully evaluated, the specification for the devices can now be drawn up and lessons identified on the type of support that staff require to learn and use the systems and technology. In addition to supporting better reporting and access to information, it should build more confidence and ability for staff to be more active in the use of the online planning tool.



circle of support

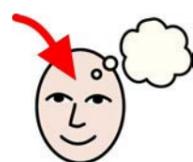
Circles of Support¹¹

Within the Group, a small charity – Equal Futures - provides support to enable and develop Circles of Support around people with a learning disability. Equal Futures relies on a very small team of staff and this year saw turnover in both leadership and much of its staff team. This meant that the charity offered minimal input to the Circles and also a loss of knowledge.

We are deeply disappointed in this outcome; however, we were able to draw on the resources of Thera Group to re-build the team and consider the requirements for leadership for the future, in addition to planning to build a larger and more sustainable team of volunteers.

¹¹ the people that are important in a person's life e.g. their family, friends, advocate, support provider and others.

Thera also plans to build on the success of some work Equal Futures carried out with another subsidiary in the Group, to share their expertise in developing Circles and their work and tools for recruiting and supporting volunteers.



learning

Documenting learning with leaders

We had planned to start working on documenting our story, experience and learning with leaders with a lived experience on learning disability. There had been some exploratory meetings with a consultant to help facilitate workshops and document findings, but this then paused as priorities changed in the last quarter of the year.



Financial Information

Key financial information	2019/20 £'000	2018/19 £'000	2017/18 (re-stated) £'000
Total incoming resources	72,936	69,975	67,204
Total resources expended	72,708	69,479	66,016
Net gains / (losses) on investments	387	264	294
Net income for the year	615	759	1,482
Net actuarial gains / (losses) on DB pension schemes	189	45	573
Tangible and intangible fixed assets	3,138	3,139	2,881
Investment properties and investments	9,459	7,288	7,118
Current assets (excluding cash)	12,264	11,600	9,517
Cash balance	1,091	4,219	4,918
Total assets	25,952	26,246	24,434
Current liabilities	7,539	6,155	7,389
Long term liabilities	5,951	8,128	5,774
Pension scheme liability	383	689	800
Total liabilities	13,873	14,972	13,963
Net assets	12,079	11,274	10,470
Net cash inflow / (outflow) from operating activities	385	(953)	918
Net cash inflow / (outflow) from returns on investment and servicing finance	(424)	(408)	(201)
Net cash inflow / (outflow) from capital expenditure and investment properties	(2429)	(490)	882
Net cash from issue / (repayment) of bonds	0	1,455	2,546
Other cash inflow / (outflow)	(241)	(211)	(35)
Increase / (decrease) in cash in the year	(2,709)	(607)	4,110

Key financial ratios	2019/20	2018/19	2017/18
Net asset cover	223%	229%	242%
Interest cover	331%	383%	833%

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



Financial Year In Review

Thera has been financially stable throughout the year, whilst continuing to provide a high level 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 material strategic 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. One significant development was a new contract to support over 50 people in Stoke which, as well as a chance to improve the lives of the people being supported, has added to revenues.

Group turnover has increased year on year by £2.9m (4.2%) from £70.0m to £72.9m. 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 that had been funded via social investment. Thera Trust's closed final salary pension scheme has seen a modest increase in the value of its assets and reduction in scheme liability.

Costs have broadly grown slightly ahead of turnover, in large part due to increased use of agency staff, as retention and recruitment of core staff in some specific areas has been particularly challenging. There were exceptional costs this year relating to the restructuring of The Camden Society and some modest additional Covid-19 related expenditure in the final quarter.

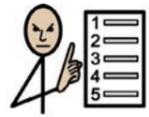
In 2018, Thera negotiated an additional £12.5m of funding from Cheyne Capital's Social Property Impact Fund to supplement the £15m agreed in 2015 that was fully utilised. This fund provides property by way of long-term lease to Forward Housing across the UK. Forward Housing works with individuals and their families and wider circles of support to identify a suitable property, which is then purchased by Cheyne Capital, 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 Cheyne Capital funded properties have continued to generate additional rental income. After the year end, negotiations with Cheyne saw a further increase in funding to a total of £30m.

On an accounting basis, the Group's overall net surplus has fallen slightly from £0.7m to £0.6m this year. Thera's total reserves grew in the year by 7.1% to £12.1m. This is equivalent to approximately two months of operating costs cover and slightly below the target set by the Board. Thera's trustees continue to pursue a progressive policy of growing its reserves and the charity is on course to meet the target by March 2021.

Thera's current liabilities have increased by £1.4m during the financial year under review and long-term liabilities have decreased by £2.2m as one of the bonds due to mature in December 2020 moved to a current liability on the balance sheet. Cash reduced overall by £3.1m to £1.1m following expenditure on property assets and prior to subsequent raising of bond capital. The value of the assets on the balance sheet has increased materially by £2.1m from £7.3 to £9.4m. Cash levels post balance sheet were significantly restored both from the bond raise and from trading.

The next period will be one of underlying stability and continuity with a continuing focus on delivering Thera's core activities, albeit with an overlay of the impact of Covid-19, which is expected to limit increases in turnover in the period. Revenues in the medium term are also expected to continue to grow. However, ongoing labour market challenges in some specific areas may continue to add to costs and act as a small drag 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 thirteen directors (of which three were appointed subsequent to the year under review in this report). All are also trustees under charity law. Four directors/trustees are paid and make up the Group's Executive Team, and a further nine directors/trustees are non-executive voluntary directors/trustees. The Group's Executive Team operate as an equal team without a Chief Executive. The role of Non-Executive Chair was recently held on an interim basis, following the departure of the longstanding previous Chair, from amongst the remaining non-executive trustees.

In 2020 two new trustees were appointed to the role of co-Chair, jointly held by an individual with a professional background and by an individual with lived experience of learning disability. This will be reported on in the next report for 2020/21.

Almost 30 new voluntary non-executive directors and trustees were added in 2019/2020 across the various group companies.

There remains a focus on growing and developing the interest of voluntary directors to contribute to Thera and its activities. Thera's articles state that there should be at least one person with a learning disability within each pool of executive directors and non-executive directors. This year the Charity Commission approved changes to two Thera subsidiaries, allowing for paid roles for trustee directors with a learning disability.

A formal recruitment and induction 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 established itself as a leading proponent of the new market for 'social investment', having successfully pursued a number of innovative capital raises from social investors. Social investors are more likely to back organisations that have a track record of accessing and returning such capital and therefore Thera should continue to be able to access this form of funding in future.

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

In July 2015, an agreement was also made with Cheyne Capital's Social Impact Property 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.

Thera has regularly used bonds as an instrument to raise investment and an additional £2m of bond finance was raised in November 2015, arranged by Triodos Bank. The funds were used for the acquisition and adaptation of properties to provide homes for people with a learning disability and for Thera's general charitable purposes.

In April 2018, Thera successfully closed its third bond and first crowd-funded bond, also arranged by Triodos Bank. The funds raised were 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 continued to retain a small portion of its 2018 bond issue at the end of the period, with the intention of stimulating the secondary market in charity bonds. A number of these bonds have since been traded on the secondary market at a premium.

In 2020, after the period end, Thera issued a fourth charity bond, again using Triodos Bank's crowdfunding platform. This bond was well supported by a large number of investors, both institutional and individual, and closed early with the target £5m already raised.

Evidently Thera is now very well established in the social investment space and the charity has an internal Social Investment Policy, which sets out how it uses charitable funds to support individual projects which have a positive impact on people with a learning disability as well as its broader charitable objectives.



overview

Marketplace: Position and Risks

Sector Overview

The social care sector experienced significant challenges which started to impact towards the end of 2019/20 in responding to COVID-19 and as the sector moved in to 2020/21, no organisation has remained unaffected, Thera included. In general, however, the sector has been well supported by government both at a national and local level. The impact and response will be detailed in the next report for 2020/21.

More generally, although limitations on public funding persist thanks to increased demand for services and limited budgets and are unlikely to materially improve 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 from local authorities and commissioners. Such impact as there has been from reductions in individual commissioned support has been more than offset by both organic and acquisitive growth. Set against a consistently very challenging funding environment over recent years, Thera's turnover has in fact increased and by 63% from £44.6m (2013/14) to £72.9m (2019/20), with reserves growing by £6.5m in the same period - from £5.6m (2013/14) to £12.1m (2019/20).

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. Within the UK, there is considerable geographical variability in commissioning practice, procurement methodologies and pricing. Local authority contracts often require a fixed level of staff even when there are a lower number of beneficiaries to support than had been anticipated. Thera continues to maintain a flexible, efficient, and cost-effective organisational structure which enables it to mitigate the risks of this variability and to generate diversified revenues, as well as to accommodate further organic or acquisitive growth.

The labour market has presented challenges throughout the year under review. With a negative impact on costs, social care organisations across the UK faced ongoing challenges with staff retention and recruitment. In some specific areas, this meant Thera needing to use agency staff at a higher cost. The potential negative impact of this has been mitigated as far as possible through retention and recruitment strategies, careful management and quality checking.

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 (CQC) and Care Inspectorate (CI) and to continued organic growth.

Risk factors

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

The Board also continues to monitor the external regulatory and funding environment closely.

An appeal on how the National Living Wage applies to 'sleep-ins', was heard in the Supreme Court in February 2020 with a ruling still awaited. There is potential for the judgement to be overturned. This may have a material financial impact on Thera and on the wider social care sector.

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

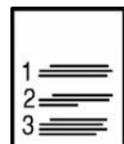
- smaller companies in the Group continuing to make a loss as a result of supporting too few people;
- challenges in pricing of contacts by local authorities;
- localised labour market supply and cost inflation;
- not meeting financial covenants on current investments;
- damage to relationships with 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;

- changes in legislation and investment performance related to pensions.

Within the year under review, there have been no 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.

Thera's 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 systematic and will always remain outside the organisation's control.

Plans for Next Year



Notwithstanding any limitations caused by the COVID-19 pandemic which will result in some change of priorities, the following key areas of impact work are planned for 2020/21:

plan



inclusion

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



impact

Recruit a dedicated Impact Management lead for Thera Group.

- ✓ To build on the work to date and, working with a range of people across Thera, to review and co-design Thera's Theory of Change and Social Impact Framework for the future.



support

Continue supporting people in their day-to-day lives to improve their opportunities for greater personal and social wellbeing, with a continued focus on equality of access and outcomes.



health

Actively seek to work with other partners in the promotion of good health outcomes for people with a learning disability.



housing

Continue to facilitate 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.



employment

Continue to support people into employment through Unity Works Social Enterprises' work programmes

- ✓ Widen our reach in supporting people into employment and training opportunities across the UK including the development of an online learning system.



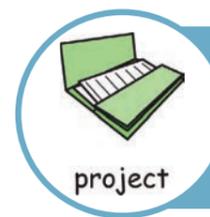
Dolphins' Den

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



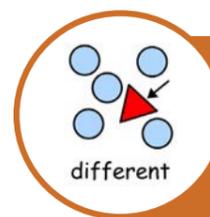
money

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



project

Develop further our approach to more flexible support to people in the day-time, beyond buildings-based support.



different

Whilst understanding and experiencing the negative impact of the COVID-19 pandemic on the people we support and work alongside, their families and our staff teams, we are aware of some emerging different ways of working to enable continued support to people with a learning disability. These are being studied through 2020/21 and will be shared in next year's report.

Appendix 1 - Overview of Methodology



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.



impact

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 organisation itself, remains at the heart of the organisation.



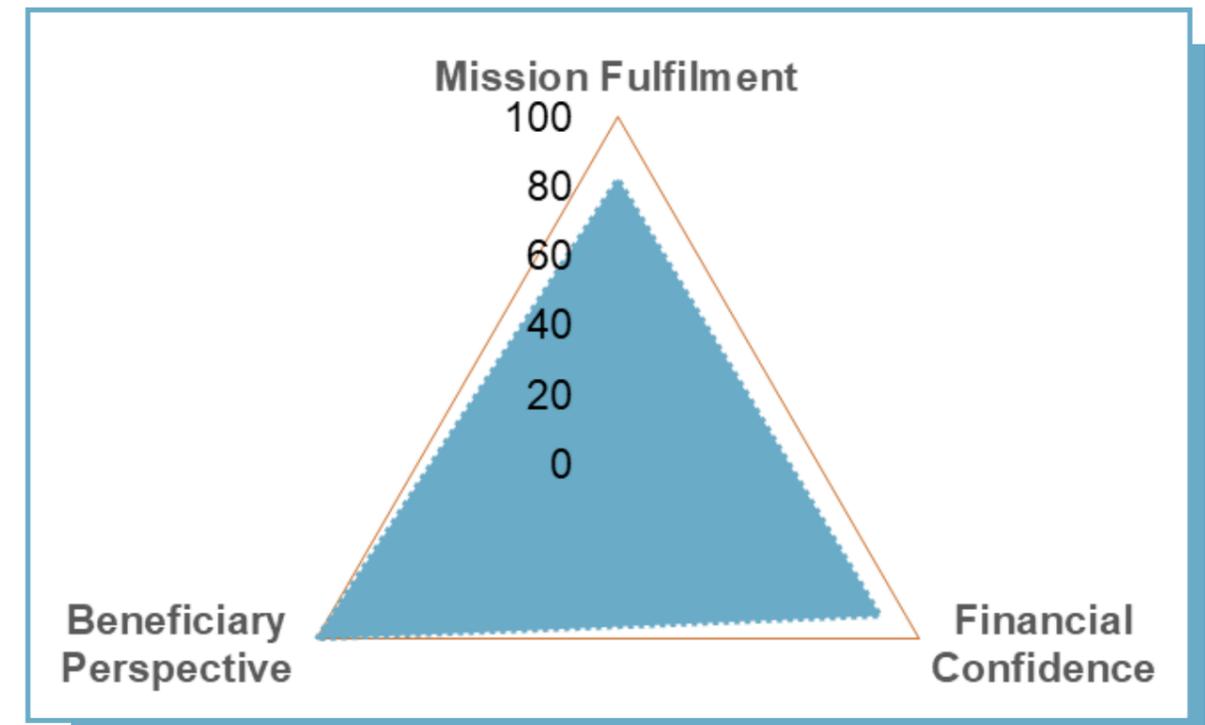
financial

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.

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 2019/20: Breakdown of Scores



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

To contact Investing for Good, please email Alex Jarman: ajarman@investingforgood.co.uk

For any query on the content of the report, please contact Tracey Brooks: tracey.brooks@thera.co.uk

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