



Supporting people with a learning disability



## Annual Social Impact Report 2020 - 2021



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 the sixth time Thera has commissioned an impact report of this nature, with these assessments being undertaken in parallel to the charity’s expanding social investment activity in recent years. Thera has issued a range of bonds for social purpose, including the most recent bond which again targeted a mix of retail and institutional investors, and has now attracted sources of socially-motivated capital from a wide array of investors in the market. Investors have in common the twin objectives of seeking to achieve a financial return, whilst helping Thera further its charitable objectives.



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 has achieved the highest ratings for both Social Impact and Financial Confidence**, having been awarded the maximum score of 1 (on a scale of 1 to 3).



impact

## Social Impact Rating Rationale

Despite the challenges presented by the Covid-19 pandemic, Thera has managed to maintain and deliver high quality delivery of care, support and services both for, and in partnership with, people with a learning disability across much of the UK. Thera continues to demonstrate its strengths in identifying the unique needs and desires of its beneficiaries to lead independent and happy lives and delivers on this through its high-quality person-centred work.

Thera has sustained the number of people with a lived experience of learning disability in leadership roles in the organisation, and, despite the challenges presented by home working, the pandemic has helped people to be involved more broadly across the organisation through the introduction of online meetings.

Thera's core support work has focussed strongly on delivering high quality personal and social wellbeing which was able to continue in the context of lockdown restrictions, with some temporary cancellations to community support work, and by enabling people to

live with family members during lockdowns. While these disruptions to people's routines have taken a toll on the mental wellbeing of many Thera beneficiaries, the organisation has remained consistent in the delivery of its work, adapting to emerging needs and circumstances as necessary.

Thera has a clear impact management and measurement strategy that is well aligned to its service delivery goals and objectives. The appointment of a new Head of Impact Management is a positive development to help drive forward the impact management strategy and highlights the importance which Thera puts on evaluating its impact. A review of the Theory of Change, to help make it useful and applicable to all sectors of the organisation, as well as to inform the information strategy going forward, will take place in 2022.

Thera continues to collect data in its six broad outcome areas: leadership, financial wellbeing, access to housing, personal and social wellbeing, social and community networks, and enabling access to employment and training programmes. This includes information on a range of outcomes 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 track Thera's own performance in its work (Thera Quality Standards). Beneficiaries continue to be involved in the creation of their own success indicators and measures, through the iPlanit tool. Some are also employed and trained as Quality Assessors, which ensures representation and consultation in the impact management process, albeit the Covid-19 pandemic restricted this work in the year in question.

The Covid-19 pandemic has created both opportunities for flexibility and innovation, as well as challenges for impact management. For instance, The Quality Company suspended its visits from March 2020, which meant that standard quality assessment data was unobtainable during this time. However, this led to Service Quality Directors undertaking virtual 'check-ins', and virtual audits were also developed during this time by the Operational Assurance Team, which can also support increased efficiency and scale in future.



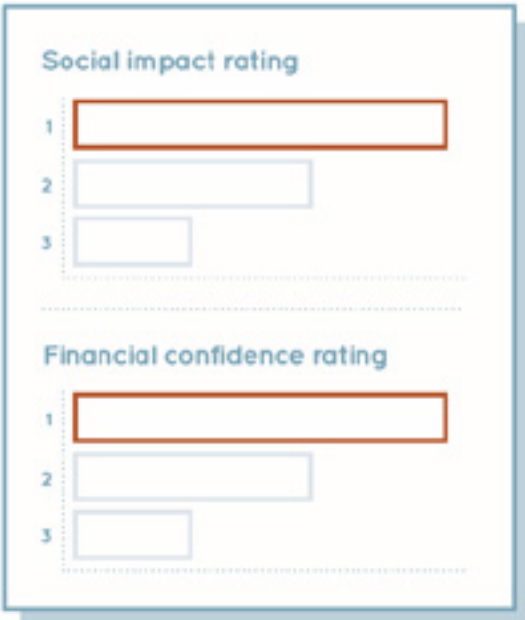
Tera verifies its data for accuracy and reflects upon, and uses, its data regularly to scrutinise its work and to ensure it continues to meet the evolving needs of the people it supports. While some improvements can be made to the collation and centralisation of data from different sources (i.e. the network of Tera companies), there is a strong commitment to robust and rigorous impact management, which will be driven by the new Head of Impact Management going forward.

The vision and good impact practice described here support our assessment that Tera has a low impact risk, i.e. the probability that impact is different or weaker than expected is low.



Financial Confidence Rating Rationale

Tera has been awarded a score of 1, the highest Financial Confidence rating available, replicating the score received by the organisation last year. Income levels this year have materially increased, in part because of additional Covid-19 related funding, and reserves have also risen. The organisation also has a high level of cash, in part aided by a bond Tera issued in the second half of the year. All financial covenants continue to be met. Tera demonstrates robust financial management with a tenth consecutive year of revenue surplus and in spite of the challenges posed by Covid-19. There are numerous systemic challenges facing the sector, particularly in relation to the labour market, and these remain acute and point to the need to continue to be prudent with Tera’s financial management.



Tera has been awarded the highest rating in both areas.



We bring you this report after an unprecedented year with the Covid-19 pandemic, which has touched everyone and brought particular challenges for the social care sector. Tera companies at this time focused first and foremost on keeping the people we support, and our staff, safe and well. This meant adopting additional stringent infection control and other operational measures in our direct care and support, and adapting other services to move into the community, outdoors or online.

Whilst focusing on keeping people safe, our teams also continued to ask how they can promote people’s wellbeing, support their connections with family and friends and continue to enable them to reach their goals.

This report presents both the challenges faced and the resilience shown across the Tera Group. Whilst the impact we could have was clearly limited in some areas, for example enabling people to train in cafes, move house or go to gigs, our teams found new ways to work and continue to make a difference for people - for example online cooking classes that became an incubator for the new Unity Pies which will be launching next year!

Other highlights include Service Quality Directors and The Quality Company piloting new quality checks and virtual visit formats to expand the number of people they can reach and to promote good conversations; as well as the beginning of the RESTORE2™ Mini training to reduce health inequalities; and Gig Buddies’ Virtual Insanity online gatherings. We would like to thank all those who have shown such resilience, creativity and teamwork to achieve this for the people they support; and to thank people themselves and their families for their patience and support.

Alongside these stand-out achievements has been much work just to continue delivering essential support day-to-day. Sadly, Tera has also lost some people we support and one staff member to



Covid-19 and our thoughts continue to be with their family, friends and support teams / colleagues as we mourn their loss.

Finally, I would like to thank everyone involved in putting this report together and hope you enjoy seeing some of the ways in which we have continued to make a difference in people's lives in this most unusual year.

Jenny Garrigan  
Director, Thera Trust

## Social 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.

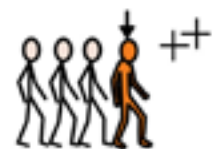
We do this by providing care and support at home and in the community and through a range of specialist services such as financial advocacy and employment and training support.

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

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

Individual direct care and support to people with a learning disability

Bespoke housing solutions

Financial advocacy

Employment and training programmes

Support to entrepreneurs

Community capacity building

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

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

- People find housing solutions meeting their complex needs

- People have choice and control over personal money

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

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

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

Increase personal and social wellbeing of people with a learning disability

Improve access to housing

Increase financial wellbeing

Improve readiness and access to employment, training and business opportunities

Broaden community and social networks

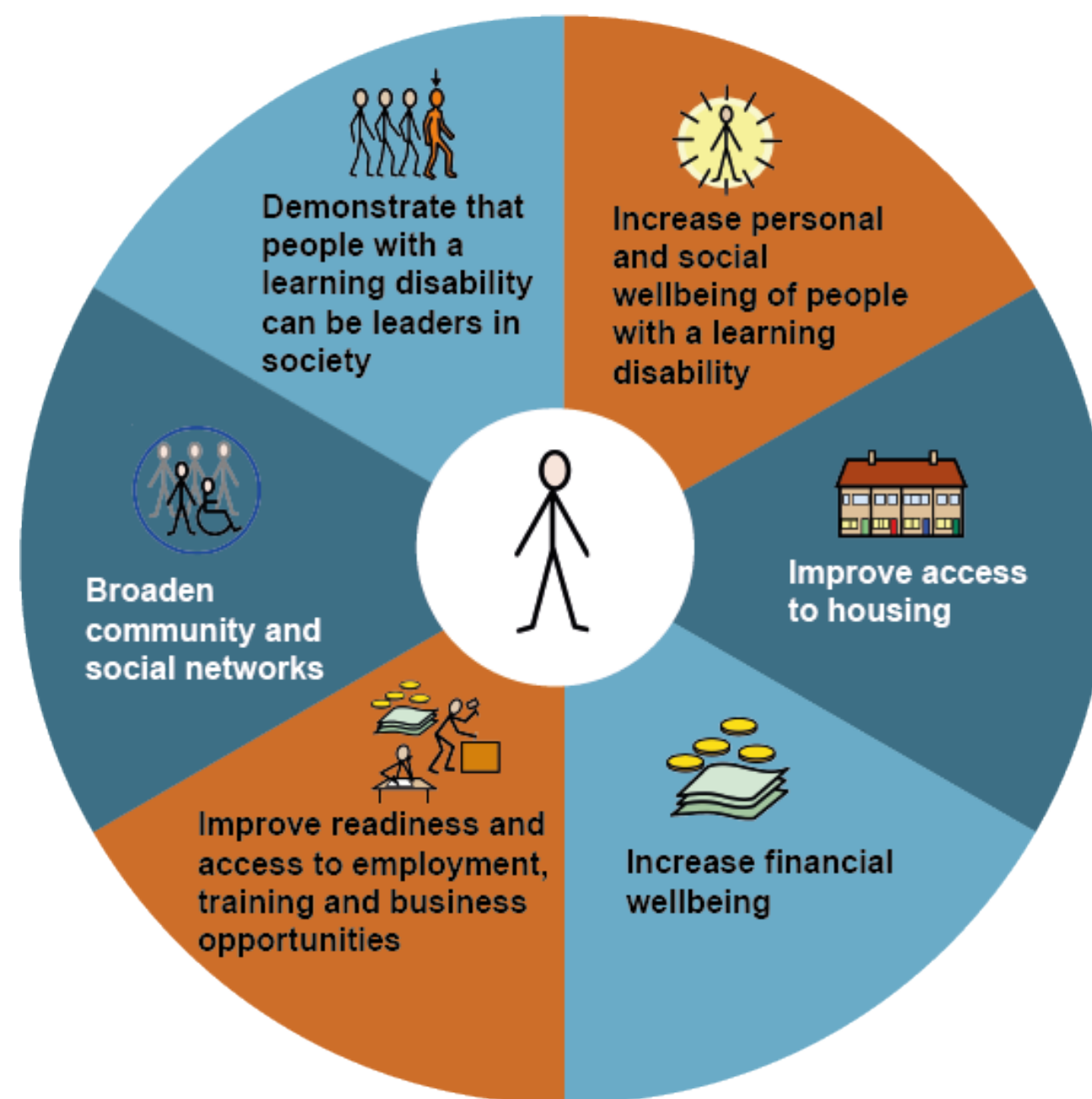
Motivated, well trained, experienced leaders and staff, who are experts in their field

## Our Impact at a Glance



### outcomes

Our Theory of Change (page 10) outlines the 7 areas of activity ranging from our day-to-day care and support, specialist activity and defined projects that support 6 broad outcomes. This report focuses on the reporting period April 2020 to March 2021.





## 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

52

company members with a learning disability

28

staff with a lived experience of learning disability employed by The Quality Company



## Increase social and personal wellbeing of people with a learning disability

Sample study of **2,017<sup>1</sup>** of **3,800** people supported. Within this sample:

522

people have behavioural support needs

<sup>1</sup> This figure represents people supported by Thera's care and support companies only - excluding Dosh, Equal Futures, and Unity Works Social Enterprises, as well as projects such as Gig Buddies, which are referred to separately in this report



805

people supported for more than 30 hours per week

Quality ratings were not available this year due to Covid-19 lockdown restrictions – see page 19, 'How do we measure it? Changes under Covid-19 lockdown'

## Improve access to housing

18

new tenancies for people to move into their own homes

7

properties developed this year

171

new tenancies over the length of the programme



## Improve financial wellbeing

217

new referrals and 32 net growth this year

1172

people receiving support from Dosh

£24.36

average increase in people's income after one year

£4,680

average increase in people's savings after one year



employment

## Improve readiness and access to employment and training and business opportunities

781

people engaged with Unity Works programmes

95

people supported on training programmes

0

people completed apprenticeships (programme extended for 7 current apprentices due to Covid-19 delay)



community

## Broaden community and social networks

41

pairs of Gig Buddies fully accessing gigs in Edinburgh, Glasgow and the Lothians

41

learners attended adult community learning courses

9

employment programmes

...

215 people entered employment

153 people sustained employment for more than 6 months

7

people supported to seek employment through project in East Anglia

28

people with a lived experience of a learning disability employed by The Quality Company



## Our Approach



### Leadership by people with a learning disability

The key to our impact lies in the way we do things. As set out in our vision (shown on the following page), we want to lead by example to demonstrate that people with a learning disability can be leaders in society and truly lead companies that provide care and support to others with a learning disability.

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, appointing an Independent Director to the company board and engaging with the board on a range of matters during the year.

## Thera's Vision



### Leaders

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



### Control

Thera will be controlled by people with a learning disability.



### Manage

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



### Choice

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



### Respect

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



### Quality

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



### Charity

Thera Group will be led by a charity.

# Understanding and Measuring Impact



## Our impact journey and learning

This is our sixth Social Impact report. In this most unusual year, we continue to use the framework of the Theory of Change developed in 2014-15 that had minor amendments made to it in 2018.



## Impact management

The question of our leaders and boards “how do we know we are doing a good job?” continues to guide our culture of impact management, decision making, and planning.

**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?

## Reporting

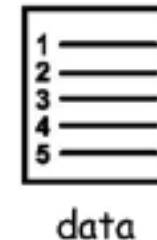


We remain committed to taking a step back annually, scrutinising and reporting on our impact and taking the opportunity to share our achievements and challenges with our investors in Thera's charity bonds, recognising this report as a true celebration of the achievements of the people we support and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



## What impact do we measure?

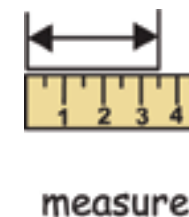
We are clear that impact measurement is a tool to test and evidence, in a range of ways, the effect of our work and support to and with people with a learning disability. The purpose is not to judge the achievements and lifestyles of the people with a learning disability we are supporting.



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.

## Data collection and measurement

We continue to measure our activities through a variety of mechanisms and collect the full range of data required of a provider of regulated social care activity, with some adaptations for the Covid-19 pandemic this year, as detailed below. In all our data collection and measurement, we remain sensitive to the very personal nature of what we do.



## How do we measure it?

### Changes under Covid-19 lockdown

Our response to the Covid-19 pandemic was focused on ensuring the continued safe delivery of essential care and support to all those who needed it, as well as the adaptation of other services and support where possible in new and creative ways. This response followed the UK Government Coronavirus Action Plan and our own Coronavirus (Covid-19) Control of Infection policy.

The Covid-19 lockdown restrictions meant that changes also had to be made to how we measure our impact and undertake quality checking by experts with a lived experience of learning disability in order to minimise non-essential contact, such as with extra staff entering people's homes.

For example, this unfortunately meant that all visits by The Quality Company were suspended in March 2020 and no in-person quality visits were carried out in this period (although operational oversight continued in other ways as explained below). A small pilot of virtual visits was undertaken in early 2021; however, the results of this cover too small a group to be a representative sample and as such these are not reported here.

In order to maintain some peer quality checking, Service Quality Directors conducted their own virtual visits throughout the year, through phone and online virtual meetings. They collaborated with their peers and with The Quality Company to create their own approach to tracking and evaluating responses to give a ‘temperature check’ for the company.

Feedback from these was collated by each Service Quality Director for their own boards and management teams, and reported to the Directors of Quality and Involvement at Thera Trust and the Thera Trust board for oversight.

Additional research was conducted in the form of a reflective wellbeing survey conducted by The Quality Company in April-August 2021, asking people to reflect back on the year in lockdown. Questions covered people’s experiences of lockdown, achievements and challenges, as well as their wellbeing. Their responses were thematically coded for analysis of common trends and experiences across the Group, and the results are presented in this report.

Essential quality and assurance checks continued as required by regulators following the Care Quality Commission (CQC) emergency support framework<sup>2</sup>:

- using and sharing information to only inspect and monitor where it is needed most
- having open and honest conversations with care and support providers
- taking action to keep people safe and to protect people’s human rights

Due to the challenges the adult social care sector faced, we had to delay some additional development projects around quality and impact. This includes the project to enhance information around the person through iPlanit access on mobile tablets; however, this pilot has now been evaluated and the learning informs the information strategy project plan, which is in the process of being approved.

<sup>2</sup> Emergency support framework: what to expect | Care Quality Commission (cqc.org.uk) <https://www.cqc.org.uk/guidance-providers/how-we-inspect-regulate/emergency-support-framework-what-to-expect>

Some operational assurance processes were adapted in this period to enable operational teams to record and report as quickly as possible, during extraordinary times of stretched resources, whilst still maintaining essential standards. This resulted, in some cases, in more locally held data which has affected the quality of data available centrally. This has affected our ability to easily measure, at this point, some differences of impact between those with complex behavioural support needs and the wider Thera population. We have now reviewed this process and all cases of delayed central collation of data have now been brought up to date to ensure the process is robust and manageable going forward.

Overall, whilst there has been a significant challenge to our working practices, which has impacted our data collection, essential quality measures were maintained to enable the impact reporting presented here.

The restrictions also provided an opportunity for reflection and innovation. This, for example, led to the development of virtual audits by the Operational Assurance Team; Service Quality Director online check-ins; virtual visits by The Quality Company; and other digital working in future, which will feed into the new impact management and information strategies.

In summary, for this report, data has been collected from a range of sources as listed below:

#### 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.
- **Regular and responsive Operational Assurance audits from support teams and managers.**
- **Data provided through analysis by experts such as Thera’s behavioural specialists.**
- **Data available through contracts monitoring, HR and finance systems.**



Measures paused due to the Covid-19 lockdown:

- The Quality Company's quality assessment data measured against Thera's quality standards.

### Qualitative

- **Bi-monthly Service Quality Director reports.**
- **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.

Measures paused due to the Covid-19 lockdown:

- Quality surveys of family carers from The Quality Company.
- Quality Assessment reports. *\*A small number were completed virtually towards the end of the period\**
- Annual customer satisfaction surveys by Dosh.

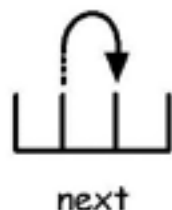
Measures added during the Covid-19 lockdown:

- **Service Quality Director virtual visits** checking in on people's wellbeing and satisfaction.
- **The Quality Company reflective wellbeing survey.**
- **Gig Buddies wellbeing survey.**

### Our impact journey next steps

Going forward, as we come out of lockdown, we look to begin the review of our Theory of Change to help the whole of Thera Group have a greater impact across our work today and in the future.

This has begun with the appointment of a new Head of Impact Management, who will lead this review and our future impact management strategy.



In line with Thera's vision and model for leadership and control, this review will be undertaken collaboratively with members of staff across the organisation, people we support, company members, and others. We will strengthen our shared understanding of Thera's vision and impact goals, and agree together how we plan to get there through a revised Theory of Change.

This co-produced Theory of Change will ensure that we can maintain a strong focus on what makes Thera Thera as we develop. It will lay the foundation for agreeing new impact measurement and management strategies across the Group. The Theory of Change will highlight our core values and goals, and enable us to test those key areas more rigorously to better measure our impact.

The new impact measurement and management strategy will be built alongside Thera's new information strategy. This will create the data systems and tools that will enable everyone to contribute to the timely reporting of key information integrated into our daily practice. This will serve both our performance management and impact management needs, and feed into our strategic and annual planning.

## 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 stories<sup>3</sup> to illustrate the changes we have seen:



leader

### People with a learning disability can be leaders in society

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



well-being

### Increase personal and social wellbeing

- > Individual Care and Support



housing

### Improve access to housing

- > Forward Housing



money

### Increase financial wellbeing

- > Dosh Financial Advocacy

<sup>3</sup> 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'.



employment

### 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



community

### 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 – 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** leadership level roles held by **11** people with a lived experience of learning disability. The director roles **represent 38% of our paid Executive Director roles**. This remains stable from the previous year with one Service Quality Director vacancy (not included in the 12 above), who was appointed in the 2021-22 period. All of our leaders are experienced in their roles and professions, with a range of service in Thera from one to fourteen years.



In the last report, we included the recruitment of Jordan Allan as Service Quality Director for Thera (Scotland). Jordan began his role at the height of the first Covid-19 lockdown in May 2020. Despite starting his role remotely, Jordan has been able to make contact with many people supported by Thera (Scotland), managing to carry out 50 quality checks and becoming quickly integrated into the organisation and influential in its management and strategic direction.

When interviewed at the end of 2020, he told us:



**“My first 6 months at Thera have been amazing, I have loved every minute of it! Everyone has been so welcoming, and I have achieved so much in 6 months. I have been speaking with the people we support virtually and over the phone.”**

**“I have learned since working for Thera that I am a good leader, and that I can show other people with a learning disability that they can get jobs in leadership roles.”**

Jordan Allan, Service Quality Director, Thera (Scotland)

Read more about Jordan's experience so far at:

[www.thera.co.uk/news/jordan-answers-questions-on-his-first-six-months-with-thera](http://www.thera.co.uk/news/jordan-answers-questions-on-his-first-six-months-with-thera)

Jordan and fellow Service Quality Directors have been engaging in a variety of work across Thera Group, including undertaking Positive Behaviour Support (PBS) training, which will enable them to work more closely with operational teams to ensure quality positive behaviour support in their companies. They will also bring their lived experience of a learning disability and close contact with people supported to shape PBS work in Thera going forward.





In this way, 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.

In addition to our most senior posts and other paid jobs, Thera also works with people with a learning disability in a variety of other roles, where they bring their lived experience, as well as a range of other skills and knowledge, to the organisation.

For example, Sophie Williams volunteers for Thera North as an Expert by Experience Trainer to help deliver the Welcome to Thera sessions for new members of staff. She works alongside Andrew Bright, Service Quality Director, and Frances Affleck, non-executive director, who all bring their lived experience of learning disability to the training. Sophie was recently interviewed about her work:



### **What do you enjoy about your work on the Welcome to Thera sessions?**

Sophie: "Well I like trying to inspire people with the song that I [did] on autism and Asperger's and to try and be a voice for people that may not be able to talk, that might be non-verbal, but might be thinking the same way."



### **Do you think it's important for you to have your lived experience of a learning disability, of Asperger's, to do what you do? Does it make a difference?**

"I would say that it does make a difference, so then other people aren't alone. People having support might be feeling the same experience as what I'm feeling."

### **What would you say, if anything, you've learnt from these roles?**

"I would say that I've learnt to be a bit more confident in myself, that I can do things when I put my mind to it. I know that my confidence wasn't as good until I started doing the "Welcome to Thera" and then it grew."



You can read an adapted version of Sophie's interview on Thera's blog at: [www.thera.co.uk/news](http://www.thera.co.uk/news)

Sophie has since obtained a paid role as a Peer Support Worker with the local Learning Disability teams, building on her experience with Thera North and in other advocacy roles with local partnership boards.

## **Building on our leadership approach**

After Thera Trust's Chairperson retired in 2019 following over 14 years' service to the Group, Thera engaged to appoint Co-chairpersons to the Trust board, to bring the complementary experiences of two leaders in the sector, one with a lived experience of learning disability. This extends Thera's equal leadership model on the board, reflecting the equal Group Executive team which includes a leader with lived experience of learning disability.

Michelle McDermott and Sally Warren were appointed as the new Co-chairpersons in 2020 and have quickly settled into their roles. They are engaging with people supported, their support teams and company boards across the Group. We sat down with them recently to hear about their first year in the role.



### **How have you found being co-chairpersons so far?**

Sally: "We're loving learning, meeting people, questioning, exploring, and just always thinking what more is possible. What can we do? How can we be better at what we do?"

### **How do you work together as co-chairpersons?**

Michelle: "From my point of view of co-chairing alongside Sally, I like the structure, we prep beforehand, and I like to go through each section and why. I open the meetings and welcome everyone and do the apologies and everything. That usually goes well."

Sally: "Co-working is not about pulling in each other at the last minute. It's really intentionally thinking and planning together. Co-



working is recognising we [not only] have some of the same skills but actually uniquely different skills.

“Michelle's real skill is to get us to prepare well and go step by step through the meeting. That's been really important [in order] to hear the different voices.”

**What have you heard in your conversations with the board and across the Group so far?**

Sally: “Most of the conversation is how are we getting through Covid. But what's been impressive to me is that the focus hasn't just been on, ‘are we doing it safely?’ It's been, ‘how are we creating opportunities to keep people connected?’

“We saw really genuine grief when people we work for [people supported by Thera] died with Covid. This isn't a systematic thing, this is people we know and genuinely care for [who] have died and I think when you see that in an organisation, that suggests it's not a business system, it's a heart and minds organisation.”

**What makes Thera Thera for you?**

Sally: “How we measure quality is about the people we work for and are they getting what they want and need, and we don't give up on those really important principles. We report on the stuff, I think, that really matters”

Michelle: “Yeah, you need money to support stuff, but it is the people that you support that are the top priority”

**What difference do you think it makes having yourself, Michelle, as someone with that lived experience of learning disability as a co-chairperson of Thera?**

Michelle: “[I am] giving my experience with the learning [disability], the lived experience and giving other people their voice”



Sally: “It's about - people with a learning [disability] absolutely have a voice and they should have a voice and have influence in the organisation. So, Michelle being there and us having ... that co-working brings a different energy to the board.”

**The Quality Company Executive Chair**

The Quality Company has created a new role of Executive Chair, to which Michelle Mansfield was appointed in July 2020. Michelle brings her lived experience of a learning disability, as well as previous board experience as a non-executive director with Thera East Anglia.

In her role, she will focus on developing The Quality Company board, as well as focusing on accessible communications and technology for people supported by The Quality Company and providing advice across Thera Group.

Michelle has had a challenging start to her role through the pandemic whilst The Quality Company undertakes a complete review of its service – “It's been a rollercoaster, is how I'd describe it!”



**What do you see as your main role?**

Michelle: “I like to make sure that the company is running properly and that Sara [Lead Director] is doing what she's supposed to be doing. I also want to make sure that we can attract non-execs and that the board is running how it should be.”

“I tend to join any training as Assessors quite like to see me. I also like to occasionally pop in on their coffee morning. I feel that's important, to get me known out there and for people to know I'm there.”

**What impact do you want to have in your role? What difference would you like to make as Executive Chair?**

“I just want The Quality Company to be the best it can be and for me to steer it the best I can do.



I want people to get to know us for being a quality checking service. I want to spread the word that we are here."

**What difference do you think it makes for you having that lived experience of a learning disability in your role?**

"I've got a lot of experience. I've managed to bring a lot of my experience to The Quality Company like putting things into easy read. So I think I have made, well I hope I have made, a difference to The Quality Company since I've been here. I think I have."



"I've given The Quality Company a few ideas about making sure that our people understand documents and stuff like that."

**What do you think has helped you in your career?**

"Just having the knowledge about people with disabilities, I guess. And building up relationships. I'm very good at building up relationships with people and talking to people."

**What has helped you in your role at Thera?**

"They have made my role a lot easier by being understanding about my needs. Just having the support; having my assistant helping me. Rather than looking at what I can't do, I've got support there to help me do my role."

"A lot of thought I think goes into Thera when they are working with people with learning disabilities, where all people's needs are different. I think one good thing that Thera is good at, is that they do think sensitively about people with disabilities."

"What I like about Thera is we're all focused on the people we support. We try and make a big difference to the people we support"

Read more about Michelle's appointment: [www.thera.co.uk/news/the-quality-company-welcomes-a-new-executive-chair/](http://www.thera.co.uk/news/the-quality-company-welcomes-a-new-executive-chair/)

Thera is proud that, in a year of tremendous upheaval in the social care sector due to the Covid-19 pandemic, we have remained true to our vision and have indeed strengthened the Group's leadership by people with a learning disability.

**We asked each of our interviewees: "Do you see yourself as a leader?"**

"Yes. Because I've never been put in that position before, sometimes I find it hard when there is a big decision to be made, and I think 'oh, is that down to me?' But it's me getting used to telling people what to do, I think!"

**Michelle Mansfield, Executive Chair, The Quality Company**

"I would say so in some degree, because I've [got the] lived experience and it's just letting people [know] they're not on their own, and I can try and be a voice out there for other people that may be struggling."

**Sophie Williams, Expert by Experience Trainer, Thera North**

"We're all equal. Where me and Matthew [Smith, Director of Quality and Involvement] are equal, we're both leaders on this event that we're planning for the buddy scheme [coming in 2022]. [Leadership for me means] I bring things together."

**Michelle McDermott, Co-Chairperson, Thera Trust**



**Recognising our leaders**

2020 has been another year of success where our leaders with a lived experience have been nationally recognised. Ian Harper, Service Quality Director for Aspire Living, was nominated to the Shaw Trust Power 100 list<sup>4</sup>. This is an amazing achievement to be listed amongst the most influential people with a disability.

In addition, Andrew Bright, Head of Development and Service Quality Director for Thera North, was nominated for the Learning Disability and Autism Leaders' List for the second time, having previously been nominated in 2018.

<sup>4</sup> The Shaw Trust Power 100 is an annual publication containing the 100 most influential disabled people in the UK: <https://disabilitypower100.com/about/>





## Promoting the leadership model

In addition to his work as Service Quality Director, Jordan Allan has extended his influence as a leader by sitting on an Employment Panel for the Scottish Commission for Learning Disabilities (SCLD). He was part of a webinar highlighting the skills and experiences that people with a learning disability can bring to the workplace.

The unique expertise of our leaders with a lived experience has also been recognised as part of the RESTORE2™<sup>5</sup> Mini project with NHS England and NHS Improvement. This project aimed to reduce barriers to people with a learning disability and autistic people reporting illness and accessing health care and treatment.

Thera's leaders with a lived experience of learning disability played key roles in developing this important health initiative for a wider audience alongside the NHS, which will now benefit Thera staff and the people they support.



## RESTORE2™ Mini Project

Andrew Bright, Head of Development for Thera Trust and Service Quality Director for Thera North joined this NHS project alongside Lorna Weston, Managing Director for Thera East Anglia. Andrew was invited to chair the NHS's 'task and finish' group that adapted the RESTORE2™ Mini training for carers (both paid and unpaid) from its initial NHS staff focus.

Beginning in March 2020 and continuing throughout lockdown, this involved leading the project group, liaising with several NHS teams and project managers, as well as a number of external organisations delivering the pilot training that eventually reached 7000 carers.

Andrew, along with Ian Harper, Service Quality Director for Aspire, and Ian's Executive Assistant, Barbara Browne, reviewed the training videos to provide guidance on accessibility. They also attended pilot training sessions along with Lorna Weston, Managing Director for Thera East Anglia, to give their feedback on the new training.

<sup>5</sup> Learn more at: <https://www.hampshiresouthamptonandisleofwightccg.nhs.uk/your-health/restore-official> RESTORE2™ is trademarked and copyright West Hampshire Clinical Commissioning Group 2019

In addition, Oliver Smith, Service Quality Director for The Camden Society, and his Executive Assistant Jaiwanda Patel, were part of a sub-group looking at the evaluation of the project.

Having helped develop the training, Thera then had 3 Super Trainers trained to deliver the new RESTORE2™ Mini for carers. They began delivering this to Thera support staff in March 2021 and had trained 80 members of staff by the end of the first month to recognise the soft signs and early warnings of ill health. The training will continue for the remainder of 2021 and aims to reach several hundred staff members.

The training gives staff members the skills and confidence to raise concerns that someone is unwell, speak to health professionals and ensure action is taken. It was recognised that carers often have the most in-depth knowledge of, and regular connection with, the individual and are therefore best placed to spot the first soft signs of ill health. These are often very personal to the individual, for example changes to routine, behaviour, eating, communication and engagement. Empowering carers to speak up on a person's behalf means that these warning signs can be acted upon and the person can receive treatment before they reach a health crisis, reducing health barriers and promoting wellbeing.

Thera Trust has since been awarded further funding to extend this training, coupled with training on STOMP (Stopping Over Medication of People with a learning disability<sup>6</sup>), which will be detailed in the 2021-22 report.

The NHS said of Andrew's leadership:

We value the on-going contribution of people with a learning disability and autistic people and their families to all aspects of our work and see this as central to the development and delivery of everything we do. NHS England committed to training 5000 paid and unpaid carers in the use of RESTORE2™ Mini, a tool to help them identify the early signs of deterioration in people with a learning disability. It was imperative that the work was led by someone with lived experience because we needed the authentic voice of people to be heard in this work.



<sup>6</sup> For more on STOMP, read: <https://www.england.nhs.uk/learning-disabilities/improving-health/stomp/>

We were working with a wide range of partners – from the voluntary and independent sector and healthcare – Andrew was vital to bringing everyone together on a common cause and constantly reminding everyone of the importance of getting it right. Andrew was able to use his experiences – as someone with a learning disability who uses services and as someone who is employed to drive forward change – to steer and guide all partners. As a result of Andrew’s leadership, we were able to train over 7000 people with absolute commitments from a number of organisations to embed the principles of RESTORE2™ Mini, not only identifying early deterioration but also to have the communication skills to work with healthcare professionals to convey signs and symptoms to get timely and effective care.

“Andrew Bright, I loved working with him, he was very thorough, always well prepared and always challenged and asked sensible questions about whether we were targeting the right people and how what we were doing would help people with a learning disability. He was a really important part of the work and having him as chair focused us on what was important in terms of the end goal.”

**Emma Stark, Premature Mortality Development Senior Manager  
NHS England and NHS Improvement**



impact

### Impact of Covid-19 restrictions for leaders with a learning disability

The introduction of remote working for all our staff members at the beginning of this year meant significant changes in the work of our leaders with a lived experience, which they found positive in some respects, but challenging in others. Working from home and saving on travel time allowed more frequent check-in contact and support from the Director of Quality and Involvement, Matthew Smith, and peer support amongst Service Quality Directors. They introduced monthly virtual meetings which proved extremely useful and which therefore continued even after lockdown restrictions eased. These enabled them to share ideas and solve issues together, for example sharing templates and creative approaches to new virtual visits to the people they support.

On the other hand, as for many home workers, it has presented challenges in terms of mental wellbeing and isolation, as well as juggling other pressures alongside work. The change to largely online communication has been difficult, but a challenge they were able to rise to through learning online working, video call, and remote working skills. For example, early in the lockdown, the Service Quality Directors developed additional communication cards<sup>7</sup> to assist with online meetings. These cards were then rolled out across Thera Group to facilitate access for all.

In interviews with Service Quality Directors about their experience<sup>8</sup>, they highlighted the relationship building and camaraderie amongst colleagues as the adversity of lockdown brought people together. They found that being online enabled them to be part of more meetings and work more closely with colleagues without the barrier of travel and time pressure. They reported developing stronger relationships with their fellow company directors, which will strengthen those companies’ leadership. The development of online working practices is also something they plan to continue into a future hybrid working model, which will enable Service Quality Directors to be more present and visible as leaders.

<sup>7</sup> A traffic light system of cards, with symbols and words, used to help people speak up and contribute in groups and meetings.

<sup>8</sup> Semi-structured interviews held with 5 of 8 SQDs in March 2021. Interviews were recorded and thematically coded for analysis of commonalities.



## 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.



Thera North's Sophie Williams, Expert by Experience, and Karen Harris Executive Assistant to Andrew Bright, Service Quality Director for Thera North talked about company membership in their recent interview:

### What made you want to join as a company member, Sophie?

Sophie: "Because I was interested in meeting new people and getting to know people. To be able to say different opinions and to try and be a voice for somebody else who might struggle."

Karen: "I think that's what company membership is ... it's really good when we have people like Sophie who want to come in and give their input effectively to the board and when you're doing that, you're thinking about the experiences of other people who might not be able to, or want to, participate in a meeting like [a] company membership meeting."

We have seen a reduction in both the number of companies engaging in company membership (from 10 to 7) and the number of supported company members across the Group (from 63 to 52). This is mainly due to the change in company structure of The Camden Society, which was developed into three separate entities. The 20 company members of the original entity affiliate themselves for the most part more with Unity Works Social Enterprises but have not, as yet, formally become members of this company.

These companies were still included in last year's count, but are not reported this year while these changes continue to be processed. Due to Covid-19 and related pressures, these companies' memberships were not able to be developed in this year as hoped, but this will be returned to as soon as possible.

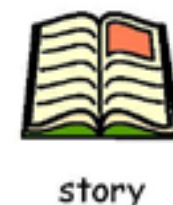


Most companies active with company membership have seen minor changes in Supported company member numbers +/-1 net, with the exception of Thera South West which has seen a growth of 6, following a new project from Service Quality Director Sam Holman and Graham Belgum, Independent Non-Executive Director.

Due to the temporary pausing of quality visits during the lockdown restrictions, it is not possible to report specifically on the quality rating for Controlling Your Thera Company this year; however other quality measures have been used as discussed in 'Understanding and Measuring Impact - How do we measure it?' (see page 18).



Service Quality Directors have reported the challenges over the year of engaging with company members whilst in lockdown. Some have found successful adaptations of membership activities, for example Thera North held a virtual AGM, which was well attended and had the added benefit of allowing people to come together from different geographical areas. Karen Harris, found that "it was the most involved and engaged AGM that we'd had". Others have had less engagement from company members virtually and have had to suspend new recruitment initiatives.



"All our membership meetings have been online since March 2020. Despite the lack of face to face contact we have managed to attract 3 new members, although we also lost 3 members.

We've also had to cancel/postpone our annual TEA party several times and this has probably been the biggest frustration for members. However, we did manage to hold a very successful AGM in December 2020 using Zoom. We have also managed to keep getting the members to feed into the company planning process through Zoom."

**David Parker, Service Quality Director, Thera East Anglia**



## 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 (even if only for the permitted daily exercise this year), travelling, and there the day has only just begun.

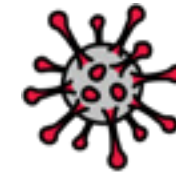
Thera teams provide a range of support for people to have a good life at home, in their local community, and for work and leisure through individual direct care and support. We support people to achieve their goals and maximise their opportunities, and through this increase their wellbeing.



support

### Individual Care and Support

This section of the report will begin by outlining how we adapted to lockdown, before talking about the wellbeing of people we support, showcasing the adaptations made and initiatives launched across Thera Group to promote people's wellbeing through lockdown. We will then test our support specifically to people with complex behavioural support needs and highlight positive behaviour support (PBS) as a tool in this.



covid-19

Lastly, this section will walk through the changes in peer quality checking this year and what is to come from quality checking in future, to ensure our care and support continues to have the impact we seek and makes a difference to each person we support.

### Adapting to lockdown

2020-21 has clearly been a very different year for social care. Whilst responding to the pandemic restrictions and adapting the delivery of support where needed, we have continued to maintain a focus on delivering personal and social wellbeing for each individual. We maintained core support services with stringent infection control measures and staff teams across the organisation demonstrated incredible resilience and adaptability to continue providing that support in such difficult and unprecedented circumstances. This included, for example, staff staying in someone's own home for longer periods whilst the people in the house were isolating, to ensure support continued without additional risk of transmission with people going in and out.

In some circumstances, support did change, where people moved in with family temporarily, or cancelled community support as their usual activities were not available. Building-based day support and respite care (short breaks) also had to stop temporarily, although they were resumed as soon as it was safe to do so. Where possible, staff adapted support in the meantime, bringing support into the community and people's homes where they wished.

The changes to people's support were a real challenge for many, who struggled to understand the disruption to their routine.



story

Karl has been supported by our short break service every week for at least 14 years. When this closed in the first lockdown, he couldn't understand the change to his routine, and he communicated this through his behaviour, which became very difficult for his family to cope with.

Our Community Support Leader helped the family by getting shopping and sorting things out for them without ever going into their house.

After a few weeks, we obtained permission from the local authority to re-open the short break service initially just for Karl. This benefitted Karl and supported his wellbeing, as well as helping his family.

**Thera East Anglia**

On the other hand, Thera North reported that some people were happier no longer going to their longstanding day services. They found that this lockdown's forced break was a welcome opportunity to re-evaluate what people do during the day. These changes will prompt acceptance of more personalised support integrated into the wider community, to promote social and personal wellbeing in line with Thera's vision. People's experiences will also inform further reviews of how we can best provide support to people during the day, which will be covered in future reports.



story

'Keith' enjoyed doing the same things each week, going to his day service during the week and visiting the arcade or bowling every Sunday. He didn't want to do any new activities, such as going to the zoo or going shopping, as these weren't things he knew. In April 2020 his day services closed and initially 'Keith' found it very difficult to adapt to having 7 days a week at home, especially with the 'stay-at-home' rule. This raised his anxiety levels significantly and he would frequently fixate on things that were "not right".

However, once he settled into a new at-home routine during this time, 'Keith' was able to learn some new skills and have more 1-1 active support in order to develop these further.

'Keith' previously relied on staff to support him with his full morning routine, including support to shower and get dressed. He did not like doing this himself, but, with staff encouragement, he gained more confidence over time to do some of these aspects without support. 'Keith' is now able to rub shampoo through his hair, thoroughly dry himself, put some of his creams on, get fully dressed independently, and put his laundry on with support afterwards. The extra time at home has given him more time and support to learn these skills and gain independence in his personal

care routines. 'Keith' is very proud of his achievements and during the year he has had off from his day service, he has thrived under the active support provided to him.

'Keith' has since gone on to experience new skills including making his own breakfast with background prompts, making his sandwiches, and picking everything he wants for lunch. 'Keith' is now choosing to do these himself and will take pride in showing new staff, or staff he hasn't seen for a while, everything he can do for himself, so they know what he doesn't need help with. 'Keith' has recently expressed that he would like to go to Twycross Zoo after seeing an advert on TV, which he has never done before. He has also got back in contact with his brother and they now send each other cards and pictures.

Overall, 'Keith' has thrived under the last year despite all the odds and being forced to do things differently to what he was used to and comfortable with. His skills know no bounds and he is able to pick up things quickly and easily now he has the time to be supported to learn these fully. 'Keith' is very impressed with himself and his anxiety levels have reduced dramatically as he is able to cope a lot more with changes and is now choosing to fully embrace these.

**Thera East Midlands**

The Camden Society team summarised the impact of the Covid-19 lockdown as follows, which will be familiar to many:



story

"It taught us that we are much more resilient than we had ever realised. The people we support and staff teams supported each other to get through a new experience no-one had ever wished for.

It gave us time to build better relationships with each other, be creative and try new things. A slower pace of life was enjoyed by many. For our staff it brought more social value to our profession and a tangible purpose at a time of uncertainty. It brought us all together.

While the people we support showed great resilience, we cannot underplay the impact of loss of social contact, work and occupation.



PPE [personal protective equipment such as masks] created a barrier to communication and physical contact which is so important to many. Jobs and daytime occupation were lost and, in many situations, will not return. People with limited social networks did not see family for months and months on end. We are left with a huge challenge to support people to rebuild their lives.”

**Ben Lanes, Managing Director, The Camden Society**



### Wellbeing initiatives

The disruption and isolation of lockdown were addressed in numerous ways by support companies to enable individuals to adapt as best they could. These all focused on providing social engagement for people supported, often through online platforms, and enabled us to check-in regularly with people to ensure their wellbeing. These provided new opportunities for some people to connect with those geographically far away and to try new online social activities.

Where possible, Thera teams also found ways to adapt in-person support where this was necessary to promote their wellbeing. Although a difficult time for many, the stories and wellbeing survey results below show that we were still able to have a positive impact on people’s personal and social wellbeing.



“We had people last Christmas who faced the risk of not being able to visit their family home over the festive period because they lived in a shared tenancy – this would have been very detrimental to their wellbeing.

We put together mitigation plans for these people and then lobbied everyone we could within the council and CCG [NHS Clinical Commissioning Group] to get their support and get the plans signed off. This was achieved and people were able to spend time with families and return to their own homes safely.”

**Chris Harvey, Lead Director, Ansar Projects**

Across the Group, initiatives were launched to promote social interaction, wellbeing, and relief from lockdown, these included:

- **Ansar Project’s PeerPals**
- **Ansar Walk Around The World**
- **Walking fundraisers:** Thera North’s Thera500; Thera (Scotland)’s Coastline walk, Thera South West’s Miles into Smiles
- **Thera East Anglia and Thera East’s Dolphin Fit**
- **Thera South West’s Hearts, Smiles and Pride Olympics**
- **Thera Daily Challenges**
- **Thera Connex newsletter**







story

Dawn, a lady we support from the north of Scotland, had a goal to learn how to use a laptop to listen to music. She had a large collection of CDs and with support she was able to learn how to move her music collection on to her newly-acquired laptop.

Dawn didn't stop there, she joined an online coffee morning. Using video calls was totally new to her, but she found that being in the comfort of her own home, it was much easier to socialise and meet new people.

At a later online event Dawn met someone from the south of Scotland. They soon realised that not only did they share their fashion sense, with matching jumpers, but that they also shared a love of their pet cats! They shared stories and pictures of their beloved pets which everyone enjoyed.

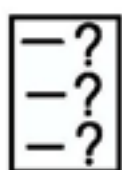
**Thera (Scotland)**

There were also many virtual events with bingo, quizzes, fancy dress, gigs, baking, dancing, and singing. We published a celebration of people enjoying their time at home in the video '[Don't Worry Be Happy](#)'. Online events also promoted good health outcomes, for example the Dolphin Fit virtual fitness sessions, which complemented work in the Group on the RESTORE2™ Mini project to promote better early action on health concerns (see page 34 for more on this).

### Wellbeing Survey and Virtual Visits

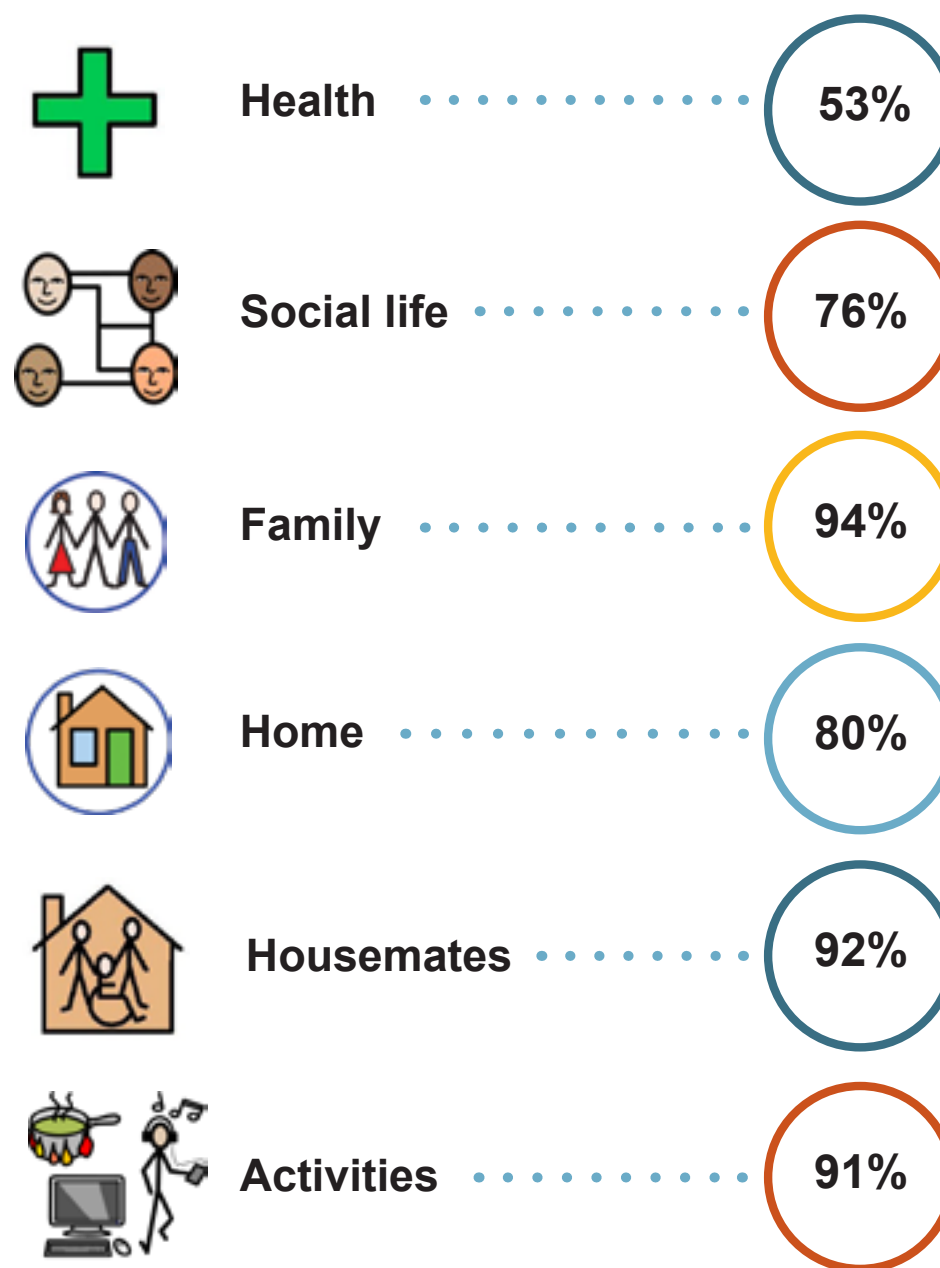
Whilst the standard quality visits were suspended during lockdown, a virtual reflective wellbeing survey was undertaken by The Quality Company. This involved 252 virtual visits spanning 9 support companies, representing approximately 12.5% of the 2,017 people supported by Thera companies with their day-to-day living.

Quality Assessors asked people to reflect on their wellbeing over the past year and share both positive and negative experiences. **62% of people said they were happy** in the recent period overall and **80% said their direct support hours were supporting them in the way they want**.



survey

The wellbeing survey covered similar themes to the previous quality visits and was conducted by the same Quality Assessors, who bring their listening, observation skills, and experience to identifying where things are going well or not so well. Overall, people reported feeling positive about:



Although a more light-touch proxy, these results do indicate similarly positive outcomes for people to previous years. For example the home rating of 94% compares favourably against the 2019-20 quality standard rating of 92%. Similarly, and despite the severe limitations under lockdown, the social life and family life ratings are not dissimilar to the 'Your Community' quality standard rating of 80% in 2019-20.

In the wellbeing survey, people highlighted the challenges of:

- Stopping leisure activities (204 = **81%**)
- Not seeing and missing family and friends (175 = **69%**)

But also shared positive experiences such as:

- Learning new skills and activities (137 = **54%**)
- Staying in touch with family and friends remotely (126 = **50%**)

Top of the list of new activities were cooking and baking, crafts and knitting; as well as music, dancing and going for a walk.

These wellbeing surveys were evaluated by the Service Quality Director for each company, alongside the results of their virtual visits and conversations with people supported and staff.

“Technology has enabled me to keep a record and measure the quality of the support we provide through talking to people and getting their feedback, which I then add to my board reports.”

**Sam Holman, Service Quality Director, Thera South West**

Helena Frewin, Service Quality Director at Thera East Midlands shared her approach to virtual visits:

“I devised my own scoring system for my visits, loosely based on the Quality Company’s, covering 4 categories:

1. Is support focused on the person?
2. Is the person supported to have an independent life?
3. Are the people we support involved in their community?
4. Having your say and controlling Thera East Midlands.

With the top mark being 12 I am pleased to report all the scores have been 10 or 11.”

In addition to this work to promote wellbeing by Thera’s direct care and support companies, the specialist companies also promoted people’s wellbeing through lockdown, for example through online gigs and baking with Gig Buddies Scotland; check-in calls from the Equal Futures team, Unity Works online sessions and Dosh’s financial support to make home adaptations. There is more detail on the specialist companies’ initiatives in later sections of the report.

### **Support for people with complex behavioural support needs**

Thera care and support companies supported 2,017 people with care and support at home and in the community<sup>9</sup>, out of a total of approximately 3,800 people supported across the Group.

Among them **805 people have been supported for more than 30 hours per week including 522 with complex behaviour support needs**.<sup>10</sup>

Thera continues to compare, against our general population, our impact results for our support to people with complex behavioural support needs, as it is nationally recognised that they are at greater risk of poor support.<sup>11</sup>

Although this has had to be done differently without the usual quality visits in this period, analysis of the wellbeing survey can be undertaken to assess responses from people with a behavioural support plan (146/252 people). This indicates more positive outcomes for those individuals, for example:

- 87% reporting direct support hours are supporting them in the way they want (80% for the whole group)
- 70% reporting feeling happy recently (62% for the whole group)

<sup>9</sup> This figure represents people supported by Thera’s care and support companies only - excluding Dosh, Equal Futures, and Unity Works Social Enterprises, as well as projects such as Gig Buddies, who are referred to separately in this report

<sup>10</sup> “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

<sup>11</sup> 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

- 90% feeling healthy (88% for the whole group)
- 77% happy with their social life (74% for the whole group)

We cannot draw any causal link from this data; however it can give some confidence that people in this group were not worse affected by the lockdown.

In addition to this analysis, anonymised evidence from Person Centred Planning using the online tool iPlanit has been used as a means of comparing results from last year of support for people with complex behavioural support needs against that of Thera's wider population.

Although use of iPlanit is still being developed in some parts of the Group, use with those with complex behavioural support needs in the sample group indicate better than average usage of the tool for planning, and the goals they set cover similar outcomes to those of the wider Thera population.

Thus, we have some indication that Thera's quality of support to people with complex behavioural support needs was better or equivalent to that of the broader Thera population.



### Positive Behaviour Support

We use a variety of approaches to promote the wellbeing of those with more complex needs. We actively promote Positive Behaviour Support (PBS) which looks at different ways to improve the quality of people's lives alongside any concerning behaviours, such as anxiety, agitation, and self-harm.

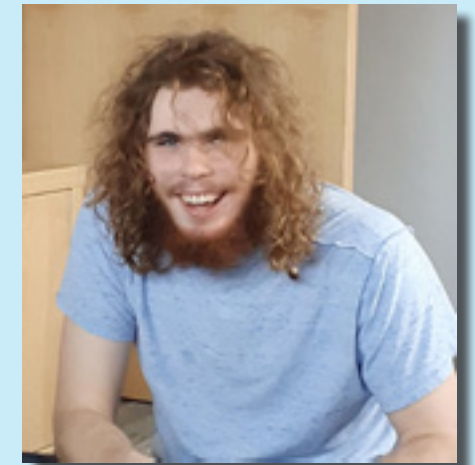
Thera employs a PBS Lead who has trained over 40 coaches across the Group, with several taking on the role in this reporting period. They lead on PBS planning and support in their teams, with the aim of finding other ways for people to feel less anxious, self-manage, and communicate how they are feeling, to promote their wellbeing and avoid harm and distress.

This can be particularly powerful for those leaving secure inpatient environments with forensic (linked to criminal activity) support needs who have previously had a lot of restrictions on their lives.



story

Ethan came to Thera through the Transforming Care programme, which aims to enable more people to live in the community in their own homes.<sup>12</sup> He had a range of complex behavioural support needs including high forensic support needs, which stopped him being able to move freely around his home.



We supported him to transition from children's to adult's social services successfully, learning more independent living and social skills, and embedding Positive Behaviour Support approaches and Person Centred Active Support to help build on his skills and levels of participation.

For example, this involved adapting the layout and design of his building to make them more suitable for him, so that he could access more parts of his home safely without restriction. This has resulted in his support team using fewer physical interventions and restrictive practices as he has built his coping skills.

This positive and highly personalised support has made a real difference to Ethan, his wellbeing and ability to live the life he chooses. He is now able to communicate when he wants something or is feeling anxious, so that the team can support him promptly and effectively, and avoid unnecessary anxiety or a later crisis.

He is able to make some snacks, choose activities for the day (using his communication aids) and at times self-manage his anxiety, for example by using the trampoline in the garden to help release tension.

Next, he will be looking to move into his own home facilitated by another member of the Thera Group, Forward Housing. We will report on this in the following year's report.

<sup>12</sup> Learn more about the Transforming Care programme at: <https://www.england.nhs.uk/learning-disabilities/care/>



Thera's support has been recognised by others in the multi-disciplinary team supporting him, including his social worker who has noted the success of this values-based approach in giving him independence and promoting his wellbeing.

In addition, his psychologist commented that "there hasn't been an active role for Learning Disability Service Psychology for some time ... if at all throughout. This has mainly been due to the extensive PBS related input [Thera] have provided; there hasn't been a need for anything extra as you have been so thorough.

[I] just wanted to say how much your involvement has been valued - it's clear to see that this has been, and continues to be, absolutely key in supporting Ethan and the staff team. I haven't experienced any other care provider where PBS has been so integral to the approach and support so robust, but this is definitely needed.

In short, you have been amazing!"

**Emma Hazel, Highly Specialist Forensic Psychologist**



### Peer quality checking

As already discussed, due to the Covid-19 lockdown restrictions, all quality visits were suspended from March 2020. Whilst quality visits could not happen in person, Service Quality Directors undertook their own quality checking, working together and in collaboration with The Quality Company to trial their own visits (by phone or video call) and other quality assessment measures.

As the lockdown extended, The Quality Company reviewed practices across the sector to evaluate options to resume its quality visits. In August 2020 it began a pilot of virtual visits with a new shorter format based on a particular theme from one of the quality standards, with 5 calls over a number of weeks to build up a more complete picture.

After a successful pilot, Thera provided funding to equip all Quality Assessors and Supporters with tablets to enable them to conduct virtual visits and 31 staff were able to return from furlough. They began piloting the new virtual thematic visits from March 2021, with a full roll out from April, which will be shared in the following report. This will include the new Health and Wellbeing standard whose introduction was necessarily delayed from the originally planned April 2020 and will now be one of the themes assessed in 2021-22.

"In the past we would do 1 Quality Check with each person, we now do 5 [shorter ones] so it is less tiring for people.

The questions are very easy to follow and allows us to have more detailed in-depth answers concerning the person's support.

I feel the themes on the form are relevant to people's support and give a good insight to the quality of support people are receiving.

I have thoroughly enjoyed being part of introducing the pilot scheme and feel many of the people we have been calling have enjoyed seeing our smiling faces during lockdown and are always eager to participate in the next check."

**Adele Spencer, Quality Supporter**

## Improved access to housing



Bespoke housing solutions



People find housing solutions to meet their needs



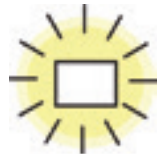
Improve access to housing



housing

### Forward Housing

Forward Housing's 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.



new

During 2020-21, Forward Housing delivered 7 new properties in various locations across England and Scotland. This included properties leased from our development partner Cheyne Capital and purchased using Social Impact Bond finance.

We have continued to work with our primary housing partner Empower Housing Association, who manage and maintain the vast majority of our properties, including the 7 new properties delivered this year.

These 7 properties have meant that 18 people have a home that meets their needs and gives them long-term security. Through the length of this programme, 171 tenancies have been developed which enable people to have their own home.<sup>13</sup>

<sup>13</sup> These figures represent the properties purchased or leased by Forward Housing that were occupied by tenants in 2020-21. 5/7 of these houses were purchased in the previous year (2019-20) but tenants moved in during 2020-21 and these numbers are therefore reported here, now that they are having an impact on people by providing them a home that meets their needs. In total 6 properties were purchased in 2020-21, but only 2 were available to be occupied in the same year, while adaptations continued past the year end for the other properties. These 2 are included in this report and the remaining properties will be reported on in the following impact report once they are able to provide a home to someone.



story

Patrick, Steven and Gary had been living together for over 10 years. Their property was huge and beautiful, however, as they got older, the property became less well suited for their mobility needs. For example, Gary, who chooses to move around the house on all-fours, started struggling to use the stairs safely.

Initially, Thera worked with Devon County Council to find ways of making their existing home safe for them. However, most ideas, such as a stair lift, would have limited Gary's independence to be able to move around his home as he pleased. Everyone agreed that it was in the three gentlemen's best interest to move to a new home, where they could access their entire home safely, independently, and comfortably far into the future.

### The House

Thera South West worked with Forward Housing and Empower Housing Association to find a suitable property. After some searching, we found the perfect little bungalow that sat on a big enough plot to be extended into a beautiful and fully accessible 4-bedroom, 3-bathroom property.

After assessing what each individual needed from their new home, plans were made that were specific to each individual's needs. Two out of the three bathrooms in the property were fitted with specialist baths, which were identified with the support of an Occupational Therapist.

In the meantime, we started involving a fourth gentleman who was looking for a new home. Peter is also supported by Thera and we thought he would be a good match to live with Steven, Patrick and Gary.

The location of the gentlemen's bedrooms in the house were chosen according to their needs and preferences. For example, Steven, who uses a wheelchair and a rollator has direct access to the garden from his room via a ramp, which allows him to access all parts of his new home easily. Gary, who loves to see who is coming to visit, has his room to the front of the house.



The garden also includes a specially designed area for each individual. For example, Gary has two chickens who have moved with him to his new home and are now in a lovely spot right behind the kitchen. Steven has acquired a brand-new sensory shed in the garden, which he can access any time through the ramp from his room. Both Patrick and Peter also have their rest areas and specialist sensory plant display.

### **The Friendship**

Before the idea of moving in together came along, Peter had not met Patrick and Steven before. He used to live in the same residential unit for people with complex needs with Gary when they were much younger, but they had not seen each other for nearly 30 years.

To introduce Peter to the existing friendship circle of Gary, Patrick and Steven, and to see if they would be happy living together, we went through a careful matching process. This included a series of meetings in various outdoor locations over several months. Peter also visited Patrick, Gary and Steven in their home for lunch a couple of times, so they could all spend time together.

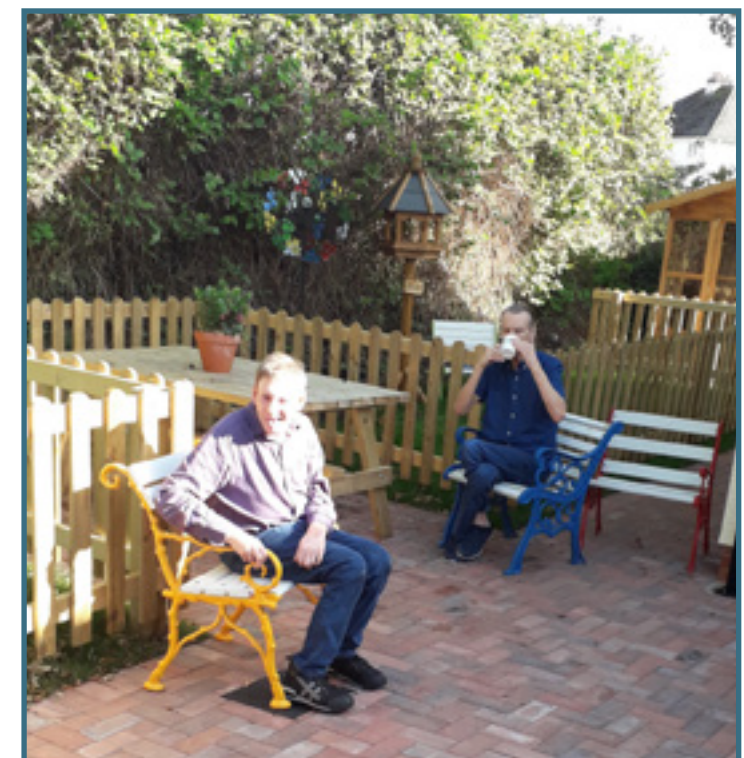
Since moving in, Peter has really made himself at home. Peter and Patrick are very similar in character and are confident and comfortable around each other. They both love the same type of music and often hum along to the same tunes together. The Beatles are a favourite of the whole house!

Perhaps the most wonderful surprise in the new house is the friendship that is forming between Steven and Peter. Steven normally does not spend time with the others. However, for the first time since we have known him, Steven is starting to develop a special relationship with Peter. Peter often sits with Steven, puts his head on the table in front of him, and Steven will gently put his hand on the back of Peter's head. Peter regularly works on making Steven laugh intentionally, to which Steven exclaims "lovely!".

The four gentlemen also now choose to spend most evenings in the lounge together enjoying each other's company, listening to music or watching TV.

Although the last one to go to bed in the evening is always Patrick, since moving into his new home, Peter, who used to go to bed very early, is starting to stay up later to spend time with the others. After only a couple of months of living together, Peter has slotted right in and has become part of the gang!

**Thera South West**







Forward Housing's activities continued wherever possible during the Covid-19 pandemic, with some inevitable delays to renovations and house moves during lockdowns. Individuals were supported to adapt where needed, making plans to still meet their housing goals in the near future as they wished.

We were pleased that some people were able to move in this period and some house purchases and adaptations were able to resume after the first lockdown. This will ensure that more properties will become available going forward to enable Thera Group to continue to meet people's housing needs and improve access to housing.



Thera East Midlands supports Karen during the day in Lincolnshire. Karen had been living with her parents for her whole life. Her parents were getting older - now in their 70s – and were worried about what might happen in the future, especially living through a pandemic. Karen and her parents wanted to know she was settled into her own space. Leaving the family home during lockdown was going to be difficult for Karen, her family, and the Thera team, but they were all up for the task!

As part of the process of helping Karen move out, Thera staff needed to understand who she would like to live with. In this case, the matchmaking had a helping hand – Karen and her parents had been made aware of a potential new home and the person already living there was one of Karen's good friends! They would often ride the bus together and hold hands, and already got along very well. On reintroducing them, their bond was immediately obvious, and, after several meetings, it was confirmed that the two would make a good match! From there, steps were taken to help Karen move into her new home.

When it came to moving in, Karen's move was made difficult because of Covid-19. Since she no longer lived with her parents, she was only allowed to see them for a limited amount of time. It was very difficult for all of them as they couldn't hug Karen until lockdown eased in May 2021.

A further challenge was that Karen would have to isolate in her home away from her new housemate for two weeks after moving in.

This would mean keeping her distance from her friend, which wasn't easy.

After the two weeks had passed, Karen was able to fully settle into her new home with her friend, and the team were able to work out how they could help her best.

Karen is very happy in her new home and is looking forward to being involved in activities in the community. She loves animals, so a trip to the local wildlife park is on the cards when lockdown restrictions ease!

As soon as the cafes opened, Karen was able to take the big step of walking to her local café. After taking huge strides into her new independent life, she sat down and enjoyed a delicious coffee and carrot cake! She also enjoys baking her own cakes in her new home. Karen is now able to live the independent life she wanted.

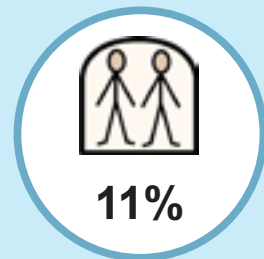




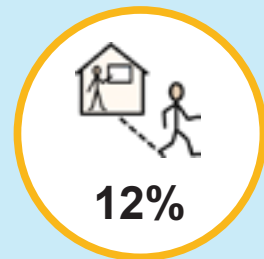
## Improving access to housing

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).

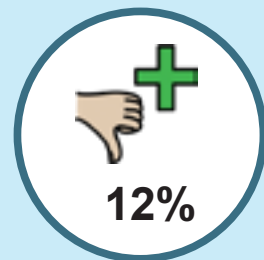
Of the referrals received in the last year approximately:



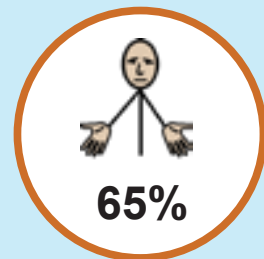
(+2 percentage points from 2019-20) are living in some form of institutional care, either in a hospital or in residential care. Many have very complex behaviours, some with forensic histories.



(same as 2019-20) are school leavers who want to live independently from their families, rather than return home after finishing their education. Frequently they choose to share with friends.



(-13 from 2019-20) of people referred are still living with their families, but due to the parents' own declining health or a desire to live independently, they choose to move.



(+11 from 2019-20) are people living in accommodation that no longer meets their needs, usually due to age and related issues, such as declining health and/or mobility.

## Increase financial wellbeing



Financial advocacy



People have choice and control over their personal money



Increase financial wellbeing



finance

### Dosh Financial Advocacy

Dosh provides financial advocacy, appointeeship and account management 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 set of standards that says how we will support people, based on what the people we support told us they want. We use The Dosh Promise 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



During the Covid-19 lockdown, Dosh moved its support online, continuing to provide financial advocacy remotely and supporting individuals and their support teams with online shopping and new ways of using their money. No annual review was conducted in this period due to the Covid-19 lockdown, but regular contact with individuals and their circles of support continued to ensure quality financial advocacy was still delivered.

In addition to financial advocacy for individuals, Dosh partnered with other organisations to share our knowledge and experience and to speak up for the people we support. This included consulting on a benefits education programme in Wales to ensure that content was accurate and accessible to their target audience. Dosh also consulted for a care and support provider on best practice in supporting people with shared purchases and delivered **online training to over 80 health and social care professionals and family carers** on the subject. We also continued to support Thera colleagues with information around best practice for supporting people with money.



### Supporting more people



Dosh continued to develop its impact across 2020-21 through growth, receiving **217 new referrals** for financial advocacy and appointeeship. Although a reduction in growth compared to the previous year (310 referrals), this was to be expected during the pandemic, as front-line supporters and social workers focused on maintaining existing care and keeping people safe, instead of necessarily sourcing new support.

### Impact on people joining Dosh

Those that did join Dosh found their spending opportunities significantly restricted compared to an average year due to the lockdown, and their savings, as with more longstanding members of Dosh, therefore increased significantly in the year.

In addition, for many new referrals, Dosh was once again able to have an impact in terms of **maximising benefit income with over £24 per week** increase on average, which will enable increased choice in spending money as people come out of lockdown.

### Income and savings outcomes for referrals made between April 2019-March 2020 (12 months on: April 2020-March 2021)

	Average on referral	Average past 12 months	Total
 income	£289.84	£314.20	+£24.36
 savings	£8,815	£13,495	+£4,680

As of March 2021:

- **1172** Individuals have a Financial Advocate
- **3369** Financial Advocate hours supplied monthly
- **1130** Individuals have an up-to-date personal financial plan (within 6 months)
- **1130** Welfare Benefit assessments completed on a quarterly basis
- **54** People supported to manage a self-directed support budget (direct payment or individual service fund)



### Impact through benefit changes

Many people supported by Dosh have moved disability benefits to Personal Independence Payment (PIP). All adults under 65 have been asked to move as part of the government's managed migration and this process has now largely been completed. As such, the number of transitions is no longer significant enough to report on in this period.








### Impact through enabling people to do what they enjoy

For many people supported by Dosh, lockdown meant that many of their activities stopped and they were unable to enjoy the things they used to, such as cinema trips, having friends over, and eating out in restaurants.


Dosh advocates worked hard with people and their circles of support to find alternative ways to enjoy themselves and make the most of their money to live a good life in lockdown. This included enabling someone to transform their own garden with a new shed and mini allotment when they were missing their outings to their local garden centre.

For another person, our financial advocate and finance team helped make purchases to create an amazing home cinema when the person's favourite local cinema closed.

## 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
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### Unity Works Social Enterprises



employment

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

Unity Works Social Enterprises currently works across the London boroughs and has recently started to work in other parts of the UK.



Unity Works delivers support across its three main areas of social enterprise, employment and training. The impact of Covid-19 was felt far and wide across Unity Works services in 2020-21. Following Government guidance, all face-to-face support sessions stopped and the social enterprises (cafes, warehouse and garden centre) closed to the public in March 2020. Since then, support largely remained online.



### Social enterprises

#### Cafes

*Unity Works runs 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.*

Whilst our cafes were hit particularly hard as part of the hospitality sector, teams worked hard to continue providing quality training opportunities, finding new ways of working throughout the lockdown restrictions.

During the height of the pandemic in 2020, our staff and apprentices team supported Westminster Council with making and distributing meals to the borough's homeless community. We made over **68,000 meals in three months**.

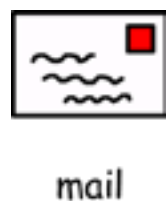
Most café kitchens remained open as much as lockdown restrictions would allow, delivering face-to-face training even when they could not open to customers, and providing delivery and takeaway services where possible.



### Mill Lane Garden Centre

*The garden centre offers flexible training for people who enjoy horticulture or want to develop their careers in this sector.*

Mill Lane saw tremendous community support during the Christmas period and was able to launch an e-shop, which allowed customers to pre-order Christmas trees for delivery and collection.



### MailOut

*MailOut is 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.*

MailOut was able to expand its activities in this period with additional businesses using its services. It also supported the distribution of Personal Protective Equipment (PPE) for the whole of the Thera Group.



### Employment

Unity Works secured a further six employment contracts over the course of the year. This included specialist support for people with a learning disability, co-located within mainstream services such as at job centres, colleges and schools. It also included employer engagement to promote the benefits of, and create opportunities for, jobseekers with a learning disability.

Due to the Covid-19 pandemic, all employment services (both 1:1 and in groups) took place online, reaching **686** people (up from 325 people in 2019-20 due to an increase in employment contracts). **41 people were successful in finding work** and **82 attended job interviews**. The employer engagement team worked with over 204 employers. Many more people were also supported, as would be expected in this lockdown year, with mental health and wellbeing needs, financial awareness, understanding furlough and redundancy.

In total, Unity Works delivered **9 programmes** in 2020-21.

During the pandemic we supported 112 people that were in work, 42 people were furloughed, and 48 unfortunately lost work due to the pandemic. The remaining were supported to continue in work and given help to adjust to new workplace conditions, working at home, and returning to work.

### Employer Engagement

The work with employers included delivering disability awareness training, group interview sessions, and networking events for candidates. We trained over **30 different organisations** (covering 50 staff) in disability awareness and we held over 20 'Ask the Employer' events for the people we support to find out more about working with a specific company.

### Training

#### Apprentice and Training programme

Due to the impact of Covid-19, we extended delivery of our apprentice programme by a year to summer 2021 to ensure that our apprentices could meet their learner outcomes.

#### Unity Works Academy

As the pandemic limited the number of trainees able to train in a café at any given time, we developed a new model, Unity Works Academy. This enabled both practical and classroom-based training at each café; making the most of the café equipment we have available to maintain the experiential element of our learning model.



## Unity Works Online

At the beginning of the Covid-19 pandemic, we launched what is now Unity Works Online; a comprehensive programme of training, health and wellbeing and employment support, broadly in line with our regular programmes of support. This was a great success with **200 people regularly accessing 30 hours of support** on a weekly basis.

This enabled many trainees to engage with employment opportunities, including developing their own business ventures, and gaining better health and wellbeing support, as well as creating a community for them and the staff that support them.



'Mary' is a Unity Works apprentice and has been working at Bromley by Bow since 2019. She adapted to online learning during lockdown well and found that being online allowed her to connect with more people across Unity Works and make the most of utilising her cooking skills at home.

'Mary' wanted to demonstrate her skills to her colleagues and peers so worked with the staff team to set up a weekly pilates zoom session. The pilates showcased 'Mary's' abilities as a leader with her excellent communication skills and encouragement to participants. From running the sessions, 'Mary's' confidence grew and she was selected to speak at an event with Westminster Council, which included members of the council, local employers and other local job support providers.

Now 'Mary' has returned to work, she is able to use this newfound confidence to complete her qualification. She recently completed a work trial and blew away the employer! She has secured a position at the Wild Goose Bakery as a kitchen assistant and is looking forward to getting her teeth into a new role.

## Unity Pies

One of the weekly groups in Unity Works Online was a cooking group. The group discussed creating a product of their own to design and sell – and after much discussion, testing and a successful funding bid, Unity Pies was born.

This enabled group members to develop not only cooking skills as they refined the pies themselves, but also business planning, marketing, and product development expertise. The pies will launch later in 2021 and we look forward to reporting on their impact in the next report!

## Health and Wellbeing

We offer a wide range of adult community learning and health and wellbeing programmes, designed to support and sustain positive outcomes.

Our Big Lottery funded Community in Action project ended in September 2020 and over its 3-year lifetime reached:

- 221 people accessing the service;
- +62 people online from March 2020 to September 2020.

The project evaluation, conducted by CordisBright, found that participants:

- were better able to express how they feel
- showed an improvement in levels of anxiety and depression, better energy levels, reduced feelings of anger and frustration, and improved sleep
- reported feeling more in control of their health
- were better able to make healthy choices around food
- reported learning about how to stay well and improve their own health and wellbeing
- felt better able to make positive healthy choices

The TfL funded Walking Group<sup>14</sup> continued to operate whenever possible during lockdown and supported 22 people through weekly walks, improving their confidence.

The PASS Project<sup>15</sup> went online with support from a National Lottery grant to provide devices to group members, so they could join online physical activity sessions.

<sup>14</sup> Transport for London in partnership with The London Marathon Charitable Trust and administered by Groundwork London: <https://tfl.gov.uk/info-for/media/press-releases/2021/july/applications-open-for-funding-to-make-walking-and-cycling-more-accessible-to-all>

<sup>15</sup> Funded by Camden and Islington Public Health Department





story

‘Rhonda’ is a trainee at Jackson’s café in Romford. ‘Rhonda’ has autism and works as an advocate for a group that represent people with autism.

When the pandemic hit, ‘Rhonda’s’ anxiety surged, and she was consistently feeling worried about leaving the house and was becoming more and more isolated.

‘Rhonda’ didn’t have the resources to access Unity Works online or stay in touch with her friends and colleagues at Jackson’s café.

The Unity Works team raised funds to procure tablets for the people we support at risk of social exclusion and prioritised a tablet for ‘Rhonda’ so that she was able to connect to Zoom.

Zoom provided structure and motivation for ‘Rhonda’, she was delighted to be able to connect with people and her confidence has grown and grown. She loves the cooking sessions and has been using this as an opportunity to create a range of exciting meals for her and her mum.

After feeling anxious about the news, ‘Rhonda’ now regularly participates in our weekly News Breakdown session and any sessions run on Coronavirus updates and feels more confident in the easing of restrictions.



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 28 people with a learning disability** in March 2020. This is a reduction of 2 from last year.

In March 2020, we suspended quality visits due to the Covid-19 lockdown<sup>16</sup> and most staff were furloughed from June 2020 to January 2021 under the Government’s Coronavirus Job Retention Scheme.

During the months that followed, staff were supported through phone calls, memos and information leaflets regarding Coronavirus, keeping safe, and wellbeing. Staff were also able to access Thera Connex, Thera’s Covid-19 newsletter, with updates and activities.

Staff returning to work in January 2021 were provided with a Return to Work learning program which involved four 2-hour learning sessions over Zoom, combining accessible learning material, discussion and video-based learning in small groups.

“I would like to say thank you for setting up the training sessions. I found them all very useful. I am looking forward to going back to work and seeing everyone again. I can't wait to get started.”

**Quality Assessor, South West**



leadership

## Leadership in employment

The Quality Company aims to be a leader in employment of people with a learning disability. We have developed different ways of working and ways to support our staff team through the lockdown.

<sup>16</sup> For more on the impact of these changes on our operational assurance and impact measures for people supported by Thera, please see the outcome section ‘increasing personal and social wellbeing’ on page 40.

We will be applying this learning in the coming year as we together develop virtual quality checking and focus on career development for Quality Assessors.



### Influence

The Quality Company continues to influence employment of people with a learning disability within Thera Group, through accessible and understandable information for its workforce and the 'Path to Jobs' working group.

We also continue our links with The Association of Quality Checkers and its members. The Association has recently undergone some changes to its board and is looking to develop its networks during the next year. This will be of benefit to us in building our network.

The Quality Company began its contract in April 2020 working with Choice Support in delivering the Experts by Experience programme for the Care Quality Commission (CQC). The Covid-19 pandemic impacted how CQC undertake its work and we were not approached to work as Experts by Experience this year. We have, however, maintained contact with our prime provider, Choice Support, and it is thought that we will see a commencement of this work during 2021 - 2022.



### Employment opportunities in East Anglia

The My Way supported employment project is hosted by Thera East Anglia and, following its first year in 2017/18, it was funded in 2019 to develop the employment support pilot project in Cambridgeshire, Peterborough and Norfolk.



Due to Covid-19, all face-to-face employment support work came to a halt while all non-essential services closed. During this time our Employment Support Manager stayed in touch with members of the group by phone and email to see how everyone was doing and provide remote support.

Some members wanted support to access community-based courses or to manage their mental health. For example, we supported a learner to source different courses in their local area, primarily with a focus on art and mental wellbeing.

In September 2020 we led a 6-week Zoom employability group for those wishing to take part, in partnership with Unity Works. 5 of the 12 original group members started the course and 4 completed all 6 weeks.

The course aimed to increase each group member's confidence in job searching and engaging and contributing to group sessions, as well as improving their digital and employability skills.

Each person took part in a mock interview and received formal feedback. Members had 1-1 meetings with a job coach to provide employment support, in person when possible and then via Zoom, as well as group Zoom calls focused on social activities, peer support and wellbeing.

Of the 4 active members of the group, one person has found a volunteering role during this year (as their story below shows) and the other three are still looking for paid work, with continued support from the project.

Although not in a job yet, they are progressing with their employment journey by rewriting cover letters, updating CVs, and applying for a number of posts, with one person attending an interview.



In late December 2020 Kerry applied for a part time volunteer's role with Cambridgeshire Skills as an Admin Assistant. She was interviewed via Zoom and was offered the role. This is a new role within a small team.

During the interview Kerry expressed her love of art and shared a few of her pieces. From this, she was also invited to be part of the newsletter team, sharing her skills and passion for art.

Kerry started working from home one day a week until restrictions were lifted. Before she started, Thera's Supported Employment Manager had a call with one of Kerry's co-workers to discuss how to support Kerry at work. This included positive communication and support techniques, to help ensure Kerry got off to a good start and had the support she needed. As part of her support network, she also has a peer mentor to support her within her role.

While in post, Kerry will be completing a volunteer's qualification and as part of her professional development will have access to the Cambridgeshire Skills catalogue of qualifications and courses.

"Kerry is working really well with us; she's taking an active lead on the aesthetics and direction content-wise of our learner newsletter which will premier its first edition at the end of April. She is very eager to take on more pieces of work and suggested a video of herself, introducing her role and experience at Cambs Skills, for a promotional video that will celebrate the health and wellbeing of the over 60's in East Cambs.

"It's really good to see her pushing her comfort levels and she seems to be really enjoying her role with us. :)"

**Kerry's co-worker**



And in her own words:

"I am just about to confirm to tell you I am finished with Thera Trust as I am happy with my volunteer work and what I do and I have the skills to keep me going to look for my real job."

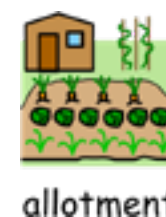
"I am so happy that I can be part of [a] team and learn new skills"



"I love my work, it maybe only one day [a] week and work from home but I hope we can go to [the] building soon. I've been working on a newsletter and we [are] going to be published next month.

"I would recommend anyone who wants to have a job and don't give up. Thank you. Terri!"

**Kerry Dunn**



Some other workstreams were unfortunately not able to continue during the pandemic. The My Way Allotment closed down in the summer of 2020 due to the pandemic and a lack of volunteers.



Work with the Young People's Team continues with one person and another two through the adults' team; and there are plans to work with this team more over the coming year.





## 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.



As reported last year, the source of funding for this project has come to an end and we took the time to review our approach. We have now put together a knowledge roll-out proposal to ensure the sustainability of the project going forward. This will train members of the local operational teams of Thera companies who are interested, as well as other Project Managers in Thera's Development team, in running Dolphins' Den 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. Our work from April 2021 onwards will consist of doing a detailed scoping exercise/feasibility study to plan the best way forward in each local area.

## 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



charity



ambition

## Equal Futures

Equal Futures is a small charity within Thera Group that supports people through 1 to 1 befriending, social events, and circles of support which help people with a learning disability to live their best life.

Its ambition is to end social isolation experienced by people with a learning disability or autism and to offer support and social opportunities for their family carers.



community

As a community-based and community-facing service, Equal Futures had to adapt our support model during all three lockdowns and stop face-to-face support.

Instead, we offered increasing emotional support and information to families over the phone and online. We held a successful pyjama party online and introduced people we support to each other in small groups. For some people this was their first experience of using technology such as Zoom or Teams for a video call.

As reported last year, Equal Futures has undergone significant staffing and structural change and was joined by a new Managing Director in November 2020.

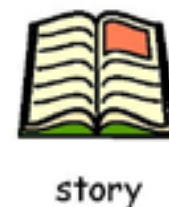


Towards the end of the period, in early 2021, the number of people with a learning disability or autism supported by Equal Futures grew from 22 to **28 people**, benefiting not only those individuals but the family, friends, and local community around them.

Equal Futures now works across 10 Local Authority areas and facilitates 6 circles of support. We provide befriending, social opportunities, and information and advice to almost 30 people and have successfully recruited and trained 12 volunteers.



This includes the relaunched Equal Futures newsletter 'In the Loop', which has proven to be a popular way for everyone involved with Equal Futures to feel connected to each other and further reduces feelings of loneliness.



Jason is in his late 20s and lives at home with his parents. He will soon be embarking on a new and exciting chapter of his life when he moves into his own supported accommodation.

Jason and his family have been involved with Equal Futures for 5 years and benefit from the support of their local project coordinator who is focusing to develop a circle of support around Jason and his parents. This circle will assist both Jason and his parents through this transitional period and beyond. A smart circle, in the short term, will involve volunteers with experience in preparing and supporting adults with additional support needs into their own accommodation. They will gently guide the family through this exciting life event. Jason's circle of support will then continue to help him achieve his goals and make meaningful social connections.

Jason and his parents are included as part of a peer support network of other families in the area who are able to benefit from the regular social events Equal Futures arrange. These events allow the families to meet, chat and offer/receive support from peers in a welcoming environment. Volunteers also attend our social events which offer a relaxed and understanding environment for potential befriending matches to bloom.

In the summer, Jason joined Equal Futures' event where we had organised exclusive use of Amisfield walled gardens<sup>17</sup>. Jason enjoyed taking part in a pizza making workshop and then finished off the afternoon harvesting goodies from the walled gardens with his parents to take home.

**Equal Futures**

<sup>17</sup> <https://www.amisfield.org.uk/>



gig

## Gig Buddies with Thera Trust

Gig Buddies with Thera Trust 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.

**“If I didn’t have Gig Buddies, I’d be lost.”**



online

In response to the pandemic, we took the Gig Buddies project online and gave this the name: ‘Gig Buddies: Virtual Insanity’. An online project allowed us to continue connecting with our members and run virtual social events through platforms such as Facebook and Zoom. 53% of Gig Buddies members attended online events. In addition, Gig Buddies offered regular phone calls to members who asked for them.

A survey of members early in lockdown showed the need for continued social support and connection through Gig Buddies:

**61.5% of our members told us that their usual support had changed throughout the lockdown.** Further to this, 27% were seeing their support less, and **15.4% said they were getting very little to no formal support.**

For example, James lives on his own, and gets a small number of support hours each week: “I only see my support twice a week for a few hours at a time. If I don’t have anyone to talk to, the days can feel long. I’ve found it hard due to the fact that I live on my own.”

**83% of our members told us that Gig Buddies helped them make new friends throughout the pandemic and 77% agreed that Gig Buddies had had a positive impact on their mental health (April-December 2020).**

As well as meeting new people, many project members also discovered new interests through Gig Buddies’ online events.



support

“My new favourite song is ‘F\*\*\*ed With an Anchor’ by a band called Alestorm. It’s all Debbie’s fault. She took us to Download Festival Online and she got me into them!”

Gig Buddies with Thera Trust currently supports **102 people with a learning disability** (up 5 from 2019-20) across Scotland’s central belt. We have 60 volunteers at present (down 1 from 2019-20), with **41 active Gig Buddies pairings** (up 6 from 2019-20)<sup>18</sup>.

One of the highlights of Gig Buddies’ lockdown social calendar were the regular DJ nights. Initially suggested by Chris, Al, and Colin; 3 Gig Buddies members who happened to be DJs. They quickly became a regular fixture in the ‘Virtual Insanity’ events calendar, attracting a crowd of regulars and new faces every other week.

Chris and Al stay in Glasgow, and knew each other before lockdown, but Colin, who lives in Edinburgh, first met the others in a Gig Buddies Zoom chat. The Gig Buddies team helped the three of them get in touch to plan their DJ nights, and they became fast friends. They took to calling themselves “The Three Stooges” and even made themselves some mock-up logos and promotional materials, which they hope to use to start their own DJ business after lockdown.

Through the wellbeing fund Gig Buddies provided the DJs with Spotify Premium memberships, and also supported the DJs to further develop their DJing skills and adapt to working online. This provided the DJ’s with a boost in confidence, as well as new skills which they plan to use in their future endeavours outside Gig Buddies.

Colin told us: “The DJ nights have been really good. I’ve thoroughly enjoyed doing them. The Zoom app is good, and I’ve learned how to use it and how to share my audio which has been good. All this digital technology is going to be the way forward for a while.

<sup>18</sup> The totals have been reviewed to only count active pairings and as such, the pairings numbers differ slightly from previous reports.



With all this social distancing we don't know how long before we can see people in person, but this lets us feel like we're getting out every day and get to meet new people all over Scotland."

In addition to the Gig Buddies DJ nights, Chris and Al ran their own Zoom parties every weekend, with some of their new friends from Gig Buddies Edinburgh and West Lothian coming along. Both also performed at the Gig Buddies Open Mic Nights.

As well as the entertainment they provided, the DJs themselves found that having a space to perform and gain experience was transformative. They built up their confidence, skills, and self-worth. Chris said:

"I've been DJing for a long time, and I know I need experience to get jobs, but I've been knocked back a lot. Gig Buddies has given me a chance to show what I can do. Nobody's ever given me that before".

Al told us how being part of Gig Buddies, and running his own events, helped him through a particularly difficult time. "This is keeping me going. Getting to do my DJ night is brilliant. Music is my lifeline. I'm struggling sitting in the house bored and it keeps me from getting down and depressed, getting to have a laugh and a carry on here. I've never had so much enjoyment and felt so supported. We're going to have a hell of a party when this lockdown is finished!"

Similarly, Colin said: "I DJ on the Radio, and that had to stop for a while. It was good to have something else to keep me going. Now I'm back to my radio DJing on a Wednesday and Sunday, and we moved the Gig Buddies DJ night to a Thursday so I can keep doing that too. I'm looking forward to my set at the Dream Festival too. It's going to be awesome!"

**Gig Buddies with Thera Trust**

## Limits and Challenges



continue

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



covid-19

### Covid-19

The Covid-19 pandemic and associated lockdown has had an immense impact across all areas of Thera's work, as detailed throughout the report. Essential care and support was maintained throughout, alongside creative adaptations to other support. This included changing support to online delivery and temporarily suspending development projects as all efforts were focused on keeping people safe through the pandemic. This also affected some key data used in impact measurement, most notably the quality standards ratings, as in-person quality visits could not take place.

As we emerge from the pandemic in 2021, many of these projects will be resumed and learning from the operational changes will be distilled and applied, for example using hybrid (online and in-person) approaches to quality visits and Service Quality Director checks in future. These will be shared in the following report.



medication

### Data Collection: STOMP and iPlanit

Teams continue to support individuals to access reviews of their medication in line with the STOMP initiative (Stopping Over Medication of People with a learning disability), as well as broader person-centred planning online through iPlanit.

Whilst these have continued as needed in lockdown, the anticipated reviews of data collection processes and opportunities to become more digital and timely in our data management have had to be delayed. This work will be picked up again in 2021-22, boosted by the quality assurance themed audits review for operational companies and the new Information Strategy.

This aims to include the roll out of tablet devices to each team, with a view to facilitating more digital data collection and recording.



## Documenting learning with leaders

We had planned to start working on documenting our story, experience and learning with leaders with a lived experience of learning disability. There had been some exploratory meetings with a consultant to help facilitate workshops and document findings, but this then paused as we focused on delivering support through the pandemic.

## Financial Information

Key financial information	2020/21 £'000	2019/20 (restated) £'000	2018/19 (re-stated) £'000
Total incoming resources	79,193	73,042	69,975
Total resources expended	77,403	72,862	69,479
Net gains / (losses) on investments	(565)	387	264
Net income for the year	1,289	567	759
Net actuarial gains / (losses) on DB pension schemes	(865)	364	45
Tangible and intangible fixed assets	2,577	3,138	3,139
Investment properties and investments	9,344	9,459	7,288
Current assets (excluding cash)	11,416	12,264	11,600
Cash balance	7,744	1,091	4,219
Total assets	31,081	25,952	26,246
Current liabilities	6,808	7,539	6,155
Long term liabilities	10,618	5,951	8,128
Pension scheme liability	1,639	871	689
Total liabilities	19,066	14,360	14,972
Net assets	12,015	11,591	11,274
Net cash inflow / (outflow) from operating activities	4,437	385	(953)
Net cash inflow / (outflow) from returns on investment and servicing finance	(552)	(424)	(408)
Net cash inflow / (outflow) from capital expenditure and investment properties	82	(2,429)	(490)
Net cash from issue / (repayment) of bonds	5,000	0	2,455
Other cash inflow / (outflow)	(2,341)	(241)	(1,211)
Increase / (decrease) in cash in the year	6,653	(2,709)	(607)

Key financial ratios	2020/21	2019/20 (re-stated)	2018/19 (re-stated)
Net asset cover	226%	223%	229%
Interest cover (EBITDA)	551%	334%	383%

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



## Financial Year In Review

Thera has strengthened its finances this year without compromising on its focus to provide high levels of care, support and services to people with a learning disability. It has been another year of continuity for Thera's core strategy of ensuring individuals with a learning disability are aided to lead an independent and fulfilling life. In the context of Covid-19, there have been no other material events, nor significant acquisitions or disposals.

Group turnover has increased year on year by £2.0m (2.7%) from £72.9m to £74.9m. This increase largely reflects price inflation as some areas of activity reduced or ceased in the year and the number of people supported reduced. There was a further modest increase in rental income from 7 new properties completed in the previous financial year under the continued success of Forward Housing.

In addition to group turnover from charitable activities, there has been additional exceptional income received this financial year to cover the additional costs associated with the charity's response to Covid-19, including the cost of personal protective equipment and from the government furlough scheme. There has also been a small increase in income derived from fund-raising and other donor activity following the appointment of Thera's new Head of Fundraising and the development of a new fundraising team. There was also a surplus made on disposal of two properties.

There has been a balance sheet loss in Thera Trust's closed final salary pension scheme liabilities as a result of regulatory changes linked to the Retail Price Index, following a government review, as well as a liability for an additional final salary scheme brought on to the balance sheet for the first time.

Expenditure increased at a lower rate than income, with some spending reduced or delayed due to Covid-19. Operationally, the year was clearly exceptionally difficult in particular in ensuring sufficient staff were deployed to meeting the continuing needs of Thera's beneficiaries amidst the various lockdowns and restrictions.

The Group has nevertheless recorded another surplus, which has increased from last year's £0.6m to £1.3m. Thera's total reserves also grew in the year by 3.7% to £12.0m. Reserves represent the equivalent of approximately two months of operating costs. Thera's trustees continue to pursue a progressive policy of growing its reserve position and the charitable reserves policy was updated during the year.

Thera's current liabilities have decreased by £0.7m during the financial year under review. Long term liabilities have increased by £4.7m due to this year's bond raise. Cash increased significantly by £6.7m to £7.7m primarily for the same reason. Whilst some cash is now being used productively to purchase properties post year end, it is considered helpful to maintain a higher level in the short term as a safety net until there is greater clarity of the impact on social care as the sector emerges from Covid-19. The value of the assets on the balance sheet is broadly unchanged and stands at £9.3m. Two properties were sold this year and four new properties leased. The two covenants linked to bond finance continue to be met.

The next year will be one of underlying stability and continuity with a continuing focus on delivering Thera's core activities. Revenues in the longer term are expected to continue to grow. However, labour market risk is expected to be higher with pressure on both supply and wage rates, which also have the potential to constrain growth.



## Governance

Each company within Thera Group has its own board of directors. Regional company boards consist of a Chairperson, Managing Director and a Service Quality Director, a paid executive director with a learning disability, supported by, and working alongside, a number of other un-remunerated 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/carers 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 and carers, as well as 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 newly appointed in the year in review. All are also trustees under charity law. Four directors/trustees are remunerated and make up the Group's Executive Team, and up to nine directors/trustees are non-executive un-remunerated directors/trustees. The Group's Executive Team operate as an equal team without a Chief Executive. Whilst there have been no changes to the constitution of the Executive Team this year, the Director of Operations will be leaving the board in March 2022 and a succession plan is being taken forward.

Between May and September 2020, two new trustees were appointed to the role of Co-Chairperson, jointly held by an individual with a professional background and by an individual with lived experience of learning disability and with a background in supporting people with autism who is well known in the sector. Another new non-executive director was also appointed, who has a strong marketing background. Five new Managing Directors took up their positions this year in subsidiary companies, as well as a new Service Quality Director and a newly created post of Head of Impact Management. Other senior leaders also joined the organisation after the year in review.

Across the various group companies, approximately 20 new un-remunerated non-executive directors and trustees took up their roles in the year. There remains a focus on growing and developing the interest of un-remunerated directors to contribute to Thera and its activities.



A Head of Governance will take up their role in February 2022 to further assist this area of Thera's work. 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.

## Investor History

Thera has established itself as a prominent name in social investment, having successfully raised multiple funding rounds from social investors. Social investors prefer to support organisations that have a demonstrable track record and therefore Thera is well placed to be able to access this form of funding in future.

In 2015, Thera issued a £1m exchange-listed bond, 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 2018. This was noted by the market as amongst the first successful exits in social investment.

An agreement was also made in the same year with Cheyne Capital's Social Impact Property Fund to make 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. The facility continues to be in use and four properties were leased this year under the arrangement.

An additional £2m of bond finance was raised in 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 crowdfunded 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 November 2020, 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 having been oversubscribed. £2m of the proceeds were used to repay the second bond.



## Marketplace: Position and Risks

### Sector Overview

Whilst the sector has been well supported by government at a national and local level through the pandemic, the impact of Covid-19 on the market for social care cannot be overlooked. This is covered in a later section in the report.

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 acquisition-based growth of recent years. Set against a consistently highly challenging funding environment over recent years, Thera's turnover has increased. It has risen by 78% from 2013/14 to 2020/21 and reserves have grown by £6.4m in the same period - from £5.6m (2013/14) to £12.0m (2020/21).

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.

Social care organisations across the UK face ongoing challenges with staff retention and recruitment and have also faced material increases in costs from increases in the national living wage.

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 maintain and review 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 availability and cost of front-line staff has emerged as a material risk as Covid-19 restrictions have eased.

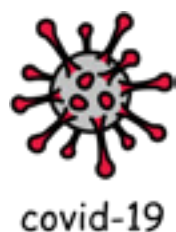
The board also continues to monitor the external regulatory and funding environment closely.

A ruling on an appeal heard at the Supreme Court on how the National Living Wage applies to 'sleep-ins' was made during the period, which has at last resolved the issue. A successful challenge had threatened to have a significant detrimental financial impact on the social care sector but is no longer perceived as a material risk.

Within the year under review, the strategic direction of Thera has remained unchanged and there is no perception of additional risk factors other than those outlined here. Other risks are identified as the following:

- smaller companies in the Group continuing to make a loss as a result of supporting too few people;
- challenges in pricing of contracts by local authorities;
- 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;
- ongoing operational risks, arising from Covid-19 (see the following section for detail).

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 systemic and will always remain outside the organisation's control.



### **Covid-19**

Thera, its beneficiaries and its staff have shown great resilience in the face of what has been an unprecedented and rapidly evolving situation. This report covers the period when the effects of the pandemic were at their most acute and with the huge dedication and sacrifice of many people, Thera managed to maintain a high level of stability across most of its activities. This is in large part due to the preparatory work, risk assessments and detailed management plans that were undertaken and implemented early on in the pandemic.

As ever, Thera's primary focus was the safety of, and support to, its beneficiaries.

Irrefutably, people with a learning disability are particularly vulnerable to the effects of Covid-19. In the year in question, there were several decisions made that assisted Thera's response. A Covid-19 Steering Group was set up to manage Thera's response to the pandemic and to implement suitable policy and practice across the organisation, in line with the often frequent changes to regulations and guidance. A significant effort was made in procuring sufficient personal protective equipment, with additional funding coming from central and local government. Staff were supported and appropriately deployed. Plans were also helped by Thera's investment in its IT infrastructure and, among other benefits, this allowed some staff to work safely from home. It was a significant help that people caring for vulnerable individuals were classified by the government as key workers.

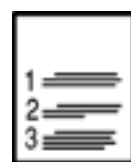
Operationally it was therefore a very challenging year, in particular in relation to managing staff, who themselves were infected or needed to isolate. Some projects were not able to progress as planned and some social enterprise and other venues where people congregate were closed temporarily during large parts of the year and around 275 of Thera's beneficiaries were affected by this. Conversely, the closure of larger-scale 'day centres' emphasised the benefits of Thera's "Thrive" strategy, highlighting the broader range of equally suitable opportunities in local communities outside of such settings.

Over the course of the year, repeatedly changing restrictions, rules and guidelines negatively impacted on some beneficiaries, such as people with autism, who saw their important routines disrupted. Where needed, staff support was increased to help mitigate this.

Thera saw levels of Covid-19 infections in the severe winter waves that were lower than other parts of the social care sector. Nonetheless Covid-19 led to the deaths of ten of Thera's beneficiaries and one member of staff. Each loss was felt with great sadness by the organisation.



## Plans for Next Year



plan

Notwithstanding any ongoing limitations caused by the Covid-19 pandemic and our recovery from it, the following key areas of impact work are expected and planned for 2021-22:



An expectation of **support to more people** as commissioning activity by local authorities returns to normal.



**Providing somewhere to live** for a number of people with a learning disability as Forward Housing is more able to access the housing market in response to such referrals.



Starting a group-wide project to **review our impact goals and theory of change** together with staff teams, people supported, company members and other partners.



**Developing Equal Futures** under its new Managing Director and a new staff team, to reconnect with members and volunteers and support more people going forwards through a scoping exercise in more areas across Scotland.



**Further developing company membership** across the group, including planning a new promotional video featuring current company members, put together by the Service Quality Directors.



Rolling out training to members of staff in **RESTORE2™ Mini** (as started in March 2021) to recognise early soft signs of illness and promote better health outcomes for people with a learning disability.



Rolling out the new themed **quality checks** through hybrid in-person and virtual visits – starting with ‘leading your own life’, ‘your home’ and ‘your health and wellbeing’.



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



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



Developing further our **approach to more flexible support to people in the daytime**, including going beyond buildings-based support.



Continuing work to **strengthen our impact** in people's day-to-day lives.

# Appendix 1 - Overview of Methodology



## The Good Analyst – Overview of Methodology

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



## Social Impact

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

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

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

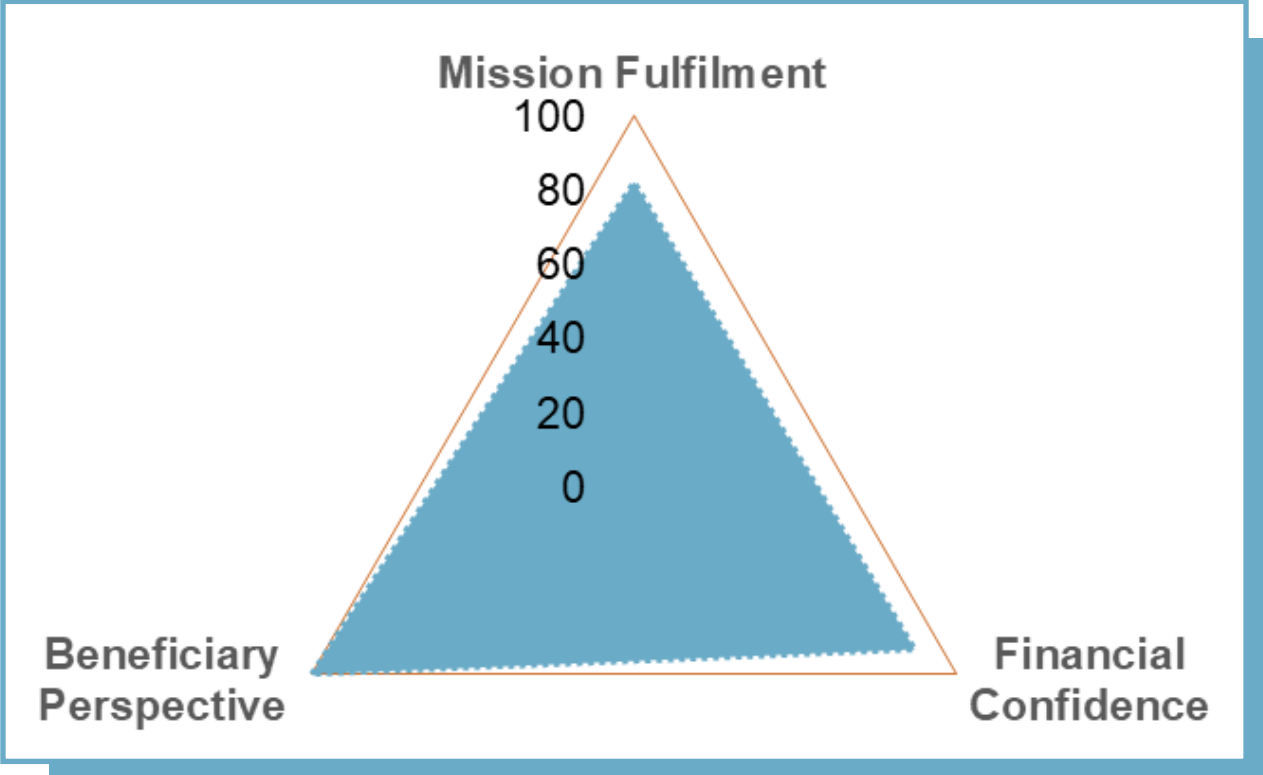


## Financial Confidence

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

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 2020/21: Breakdown of Scores



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

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