

# Connecting People Template Business Plan



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A template Business Plan offered by the Foundation  
for People with Learning Disabilities as part of Third  
Sector Investment Programme - Developing  
Business Skills for Community Connecting Services



**foundation for  
people with  
learning disabilities**

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## 1. Summary

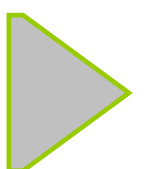
# Connecting People a new personalisation service for local authority and personal budget holders to buy

### **Background**

Recent policies together known as the 'personalisation agenda' set out a vision where all people who receive social care support will be in charge of their own lives, at the centre of planning, and controlling their funding. But the practice of personalisation is at an early stage with service choices still limited to traditional ones of day services (statutory or private) and either residential care or supported living. Investment in robust alternatives like Connecting People, grows the market for personalisation and eases its acceptance by customers.

### **What is it?**

Community connecting forms a part of support brokerage for people who would benefit from the additional depth and intensity that it offers. The added value of community connecting is that it can find solutions for people with the most complex needs and reduce reliance on more expensive specialised support. Community connectors work with individuals and the people close to them to find out their strengths, talents and interests. They then link up individuals to opportunities in their area. The key to community connecting is that it goes beyond simply helping people to be in the community. It is about establishing strong, mutually beneficial relationships. To make it happen requires skilled and experienced workers who are creative and flexible. It is a simple and cost-effective service that can be funded from a number of sources, including individual budgets. The model of delivery is a tried and tested one. 'Asset-based community development' was developed by John McKnight in America. It means that



you assume the person or community labelled as disadvantaged has assets – abilities, skills, knowledge - to offer. You then use those assets to help the individual or community to develop and grow, rather than sending in professional services to 'fix' the 'problem'.

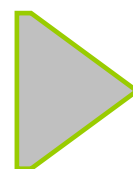
## **What does it aim to do?**

### **1. To create and develop the customers for personalisation by shaping attitudes and providing solutions to the problems it poses for families.**

The largest customer base is young people with a learning disability leaving school now. This is the first generation that will be offered personal budgets not day services in order to meet their needs. Their families are the first who will expect to plan and develop a lifestyle for their children post school. There is resistance to personalisation among this group who perceive a threat to permanence in their child's support arrangements and who do not believe that greater independence and acceptance is possible for their child. Connecting People will help to solve these problems of demand for personalisation by:

- giving intensive support to connect to mainstream opportunities or relationships thus developing a lifestyle post school outside of the social care world and demonstrating to families that this is possible
- building through that mainstream lifestyle the child's and the families' long term independence
- demonstrating to families the practical achievements that can be made by their child and reducing sensitivity to reasonable risk taking
- easing their acceptance of personalisation by giving practical help to make it work eg help know how to make budgets go as far as possible by taking up free or low cost community options or community based supports. Eg parents' most often asked question is 'what will my son and daughter actually do day to day?'

Connecting People can provide practical answers that set up more



independent patterns of life now and in the future. This replaces the carousel of child going to college and then re-entering the social care system three years down the line when college options are exhausted and the family demand help with 'care' in order to maintain their ability to work.

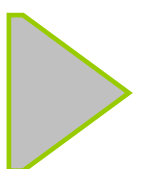
## **2. To create and develop the market provision for personalisation by offering a new type of service**

Unlike existing and traditional service options Connecting People achieves the aspirations of government policy by changing the lifestyle for an eligible person: – an indicator of genuine personalisation. It meets performance outcomes 2, improved quality of life, outcome 3 making a positive contribution and outcome 4 increased choice and control. It achieves in the words of the Care Quality Commission 'a more complete life'.

### **Specific product or services**

We provide time-limited intensive one to one support to people with a learning disability. The work can be divided into roughly sequential stages eg getting to know the person and their family, getting to know the community opportunities, making sustainable links between the two, exiting and having a watching brief. Services include:

- 1. Research and connection**- to find out what is available and connect to community resources, enabling individuals with their own social care budgets to purchase support from a wider pool – voluntary and community sources, family and friends and to have a more varied lifestyle.
- 2. Facilitation and enablement** - eg developing a circle of support, facilitating person's, families', circles of support's ideas
- 3. Negotiation and advocacy** - helping the person speak up for themselves or where necessary to speak up on their behalf. For



example negotiating a role in a community group and advocating for the value to the group and to the disabled person of them playing that role.

### **Real life examples of what service has achieved**

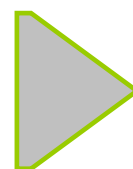
The experience at Grapevine in Coventry illustrates the case. During a two year period, 14 of the 15 people with learning disabilities established new and positive relationships to become: a healthy walks leader, a regular at a café/bar, a volunteer at a city farm, a volunteer at a toy library and member of a fitness class, a volunteer at children's ward of hospital, member of an Afro Caribbean Elders club, member of a muslim woman's group, a neighbourhood warden and volunteer at a police station, a dj on a local community radio station, recruitment officer and photographer for North Warwickshire Zone Hockey Club, resident fan and fundraiser for a steel band, member of walking group and lawn bowls team. More importantly, all of the roles we supported people to identify and play have generated new relationships and sources of support in their life.

### **Financial model**

We are seeking support to start up this business with the financial commitment decreasing to a small permanent contract. That contract will help us overcome family fears that there will be no help available if community based supports and activities break down. If we don't have a way of assuaging that fear customers will resist purchasing and may lobby to retain services the local authority wants to reduce. The remainder of the service costs from year three onwards would be met by personal budgets.

Financial illustrations are arranged in appendix I

Each year we will work with [x] people eligible for personal budgets This figure will include a proportion of the young people leaving school each year eligible for social care and an agreed number of day service users.



## 2. Business overview

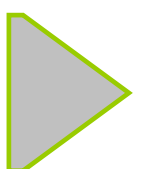
### Introduction

[provider organisation] wants people with the label of learning disabilities to live great lives surrounded by people they like, love and trust. The purpose of Connecting People services is to help people get involved in their communities, meet new people without learning disabilities, develop strong bonds - all based on what they can offer, what they care about or enjoy. It addresses the most important disadvantages that people with a learning disability face: stigma and isolation.

### The Service

Community connecting forms a part of support brokerage for people who would benefit from the additional depth and intensity that it offers. The added value of community connecting is that it can find solutions for people with the most complex needs and reduce reliance on more expensive specialised support. Community connectors work with individuals and the people close to them to find out their strengths, talents and interests. They then link up individuals to opportunities in their area. The key to community connecting is that it goes beyond simply helping people to be in the community. It is about establishing strong, mutually beneficial relationships. To make it happen requires skilled and experienced workers who are creative and flexible. It is a simple and cost-effective service that can be funded from a number of sources, including individual budgets.

We provide time-limited intensive one to one support to people with a learning disability. The work can be divided into roughly sequential stages eg getting to know the person and their family, getting to know the community opportunities, making sustainable links between the two, exiting and having a watching brief. Services include:



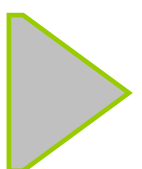
1. **Research and connection**- to find out what is available and connect to community resources, enabling individuals with their own social care budgets to purchase support from a wider pool – voluntary and community sources, family and friends and to have a more varied lifestyle.
2. **Facilitation and enablement** - eg developing a circle of support, facilitating person's, families', circles of support's ideas
3. **Negotiation and advocacy** - helping the person speak up for themselves or where necessary to speak up on their behalf. For example supporting individual purchasers with learning disabilities who might not have enough leverage on their own to persuade suppliers to provide a more responsive service for them; negotiating and a role in a community group and advocating for the value to the group and the disabled person of them playing that role.

Each individual receives a person-centred plan which brings together everything everyone knows about the people, places and activities that work or don't work for that person. This document was added to as more was learned including useful information and contacts about connections made.

## Case studies

### Gerard's story

One man who has spent almost all his adult life in a day centre was supported to join a walking group. He now makes his own way to the nearest starting point, gets picked up by an other group member and dropped off at the bus stop on the way home. He has joined their bowls team too, been team captain and taken part in the social life of the group – their cream teas and lunches. He now needs no support to do this.





## **Des's Story**

When Grapevine first started to work with Desrick nobody knew much about him and he rarely spoke. He had no family who were in touch and he had suddenly had to leave his home with an older couple who were retiring to the West Indies. He had been placed in a residential home, bringing his possessions with him in three black bin bags. The only people Desrick knew were those paid to ensure he was clean, in good clothes and fed. But what happens to the quality of Desrick's life beyond his basic needs? One of his passions is music – vibrant steel band style – and now Desrick's percussive abilities are being used at the weekly practice sessions of one of Coventry's leading West Indian bands. He is becoming known to people through his passion for music. He is making friends and they in turn are part of his circle of support. One person in particular is starting to deepen her understanding of who Des is. Band members are starting to ask questions about where he lives and how. They notice when he doesn't turn up.



## **Anoop's story**

Anoop Bakshi's story is one of discovering and pursuing a passion, joining people who share it and developing a role. Anoop, a man in his thirties with high support needs, went to college and stayed at home. He had no life outside the family circle. A connecting people worker, Darren, observed Anoop's gifts – being kind-hearted, talkative and having an appetite for life – and worked with him to use these gifts to enjoy fresh opportunities. He appreciates good coffee and together they sampled all types of coffee from macchiatos to lattes in cafes from small and independent to busy chains in bookstores, all over Coventry and Birmingham. Darren discovered that Anoop was an eager sports fan but did not go to any games or take part. To gauge his interests Anoop experienced different sports from football to ice hockey. He started to



attend Coventry & North Warwickshire Hockey Club where at first he watched practice sessions and spoke to players. Darren got to know the club's organiser, Simon and spent time with him. Simon both understood what Darren was trying to achieve and could see a mutually beneficial role for Anoop to play in the club. Two years on Anoop is photographer for the club's website and organiser of the zone (wheelchair) hockey section. He is a popular regular at the clubhouse.

## **Current position**

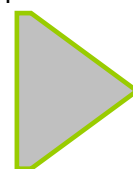
The commercial development of our connecting 'service' is at the introductory or start up phase. However that start up builds on our experience in delivering successful grant funded support services.

In general, connecting is part of a new set of services that are made necessary (or possible) by the personalisation of social care. The last two years have seen publication of social care policy which promotes choice and control by people who use services<sup>1</sup>. Together these policies are known as the 'personalisation agenda'. They set out a vision where all people who receive social care support should be in charge of their own lives, at the centre of all planning, and controlling their funding in ways they want.

The local authority circular published in January 2008, *Transforming Social Care*, sets out, in greater detail, how the whole sector will need to change to make sure this vision becomes a reality. In particular, it highlights the importance of brokerage and advocacy services if people are truly to be in control and at the centre of things. Connecting as described above shares functions with both brokerage and advocacy. Connectors, brokers and advocate may all research what is available to a person, plan, advocate, negotiate and mediate. But most often a broker and a connector will be involved in the implementation of the outcome of advocacy whilst the

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<sup>1</sup> These policies are described in: Improving the Life Chances of Disabled People, the Green Paper *Independence Well-being and Choice*, the White Papers *Our Health, Our Care, Our Say, Valuing People Now*, the document *Putting People First* and the Green paper on Social Care (2009).



advocate may not. A connector will go much further than a broker in sourcing and developing informal community based supports.

Personal budgets are the practical means by which the policy shift towards user-led services is supposed to happen. Instead of receiving a social care service an eligible person receives a budget with which to meet their social care needs their way.

As a business, Connecting People sits in the social care 'industry', an established industry which is now having to adjust from bloc contracts to the introduction of personal budgets. That adjustment is only just beginning and it is too early to know the impact of personal budgets and what the take up will be. The industry has opportunities to reshape or develop new services made necessary by 'personalisation' and to introduce greater flexibility in its working.

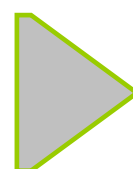
## **Competitive advantage**

Connecting People is not knowingly in direct competition with any current social care provider in [location]. The nearest competitor might be Penderels who provide help with direct payments including how to manage payments, recruiting and managing staff, where to obtain care support and any other general advice. They have also been asked to pilot support brokerage. To our knowledge Penderels are not stepping beyond this role to provide support directly.

## **Market niche**

Connecting People addresses a significant gap in service provision for a new market.

The new market is made up of young people with a learning disability leaving school now. This is the first generation that will be offered personal budgets not day services in order to meet their needs. Their families are



the first who will expect to plan and develop a lifestyle for their children post school. Within that market young people and families from Black and Minority Ethnic backgrounds present a particular opportunity. A recent report showed that only a fifth of those from black or asian backgrounds who are eligible are known to services. So there is hidden demand. The figure for other ethnic groups is even lower. <sup>2</sup> The Black and Minority Ethnic (BME) families and individuals we work with are reluctant to use existing disability services. Purchasing and shaping your own support should have a special appeal to them as they could then control how services are delivered and by whom. The market also includes older adults using day services. Here the demand is more likely to come from the local authority which seeks to reduce dependency on its high cost services than from individuals and their families.

All segments of this market have a need to know how to spend their budget and their support time most effectively. They also need to know how to make budgets go as far as possible by taking up free or low cost community options or community based supports. The customers own perception of need is likely to focus instead on what will be son and daughter actually do? Connecting People can provide answers.

**1. Connecting People provides a person with a learning disability with a variety and depth of community involvement that reaches beyond that offered by other services.**

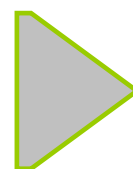
A SCIE survey of best practice in 2007 described:

- Small community-based 'clubhouses' as an alternative large day centres. The survey found that unfortunately the clubhouse model typically resulted in people with learning disabilities being located **in** a community but not developing any connections **to** that community.

**Our service is different because** it is not about congregating people with the same label in a building together. Our activity is not based in a

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<sup>2</sup> Based on prevalence rates and a comparison of expected versus observed numbers: Health Needs Assessment on Learning Disabilities in Coventry John Forde, Patrick Daly, Michelle Arora (2008)



building. Instead it focuses strongly on forging relationships between individuals with a learning disability and other people and groups through shared interests and passions.

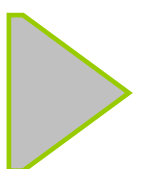
- Evening support to small social groups that go out together. **Our service is different because** we do not focus on disability groups using community amenities.
- Instead our work aims to widen the variety of relationships experienced by people with learning disability. It is carefully directed by an individual's wants and aspirations not by those of a group. It helps individuals to belong by using their abilities and interests to contribute and take part.

## 2. Access to and knowledge of the new market is strong

[provider organisation] has other services that uniquely among [location] providers work with young people in special schools and their families. We also have a dedicated service for young people and their families from BME groups. There are on average 12-15 young people leaving school each year eligible for social care funding of whom some are from a BME background. At the moment we provide person-centred planning to most those young people. We have therefore build up strong working relationships and a good reputation with schools, families and young people themselves across all ethnic groups. Working intensively with them during the year prior to leaving school and less intensively afterwards as planners and advocates has given us insights into their experiences, views and needs.

Schools and special education management are supportive of [provider organisation] because our other work clearly contributes practical actions that meet local and national government strategy.

[provider organisation] also knows some of the individuals and their families who use day services because our earlier connecting work focused on this group.



### **3. Specialist knowledge and contacts**

An important asset base in [provider organisation] is our knowledge, credibility and contacts. This strengthens service delivery and helps us with marketing and gaining support for new or existing work.

We have unique expertise in providing connecting help to people with very specific needs, based on detailed local knowledge. Our level of specialist skill is indicated by the fact that the Foundation for People with Learning Disabilities asked [provider organisation] to write the national guidelines on connecting people for other support organisations.

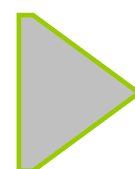
We have good awareness of other providers locally and regionally through networks, forums and the local Partnership Board. This too strengthens and informs marketing, planning and delivery.

Our national government contacts and knowledge of good practice around the country, allow us to swap knowledge/skills and continually promote staff learning and development. It makes us good at consistent and high quality delivery of new, untested projects. It also helps us to spot new opportunities early.

### **4. Skills**

As well as our skill at the practice of connecting, staff at [provider organisation] have good technical skills in web management, using film software, social network sites and blogging for sharing achievements and communicating with young people, families and communities. We also have substantial skill in overcoming the intellectual barriers of working with both young people and adults with a learning disability eg producing information in easy read form, presenting information in engaging and interactive formats.

### **5. Clear purpose and values that support the business**

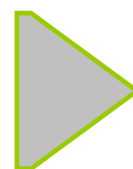


We encourage people to figure out what it is they love and then do it. Not only does it lead to happiness it fosters new connections as our enthusiasms touch others. As workers, our belief in what we do helps us do it better.

### **Strength of the model**

The model of delivery is a tried and tested one. 'Asset-based community development' was developed by John McKnight in America. It means that you assume the person or community labelled as disadvantaged has assets – abilities, skills, knowledge - to offer. You then use those assets to help the individual or community to develop and grow, rather than sending in professional services to 'fix' the 'problem'. It is an approach which stimulates the strengths that are already present or latent in a person or a community. Our own experience of implementing this approach described above has shown that with the right numbers and timescale it works. We are also forearmed with knowledge of the barriers to the model's success and can therefore line up support for Connecting People employees which will help to dissolve those barriers. For example we are setting up a parent led support group for parents. We could provide 'snapshot' training for community groups or organisations. We already have good contact with and knowledge of BME families though existing [provider organisation] work.

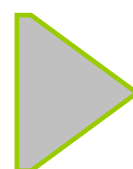
Our delivery model's strength also lies in its commitment to comprehensive person centred work with individuals. High-volume work with a multitude people is less effective in getting to the root of a person's talents and abilities. Everybody is different and our work reflects that bespoke approach. Buildings, systems and structures do not make people's lives better. Our work, guided by empathy and creativity, enables individuals to develop meaningful relationships, which in turn has the potential to lead to genuine community inclusion.



## **Growth plan**

We are confident that the policy change to personal budgets and the level of need evidenced by the figures on eligible young people leaving school will provide a demand for our business that is likely to grow over the next 3 years. The customers' understanding of what they need in the era of personal budgets will develop too and we can help that to happen. Our confidence that the business can endure is based on our competitive advantages described above and the knowledge that we have amassed of methods which work.

The business plan aim is to enable us to reach the [x] young people per year who are leaving school and [x] from day services. We also need to bear in mind that these are likely to be people with the highest support needs.





## 3. Business strategy

### Our goals for 2010/11 and beyond

- To provide a service to the [x] people we calculate will need intensive support to connect to opportunities and relationships outside the social care world each year. This figure will include a proportion of the young people leaving school each year eligible for social care and an agreed number of day service users.

### Practical steps – resources

#### 2010-11

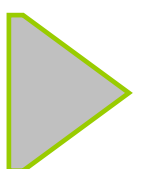
- Devise and secure local authority agreement March 2010
- Identify customers, segment them, conduct market research, reshape and price business accordingly
- Recruitment of staff
- Marketing
- Phased service delivery starts Sept 2010

#### 2011-2014

Practical steps to be identified in 2010

### Strategic issues

The greatest external threat to our business in the short and medium term is the recession. Even if Labour retains power, in the three years 2010-12 total public spending is set to fall. As the recession will push up welfare bills and the deficit is pushing up debt repayments the amount of money available for public spending is likely to be even less than planned decrease syndicates. The severest cuts are likely to come in the 2011-2014 financial spending review. Health and social care services are thus operating in a tough economic climate with expenditure by Local Authorities and the NHS under close scrutiny, compounded by the prediction that there will be a



£ billion gap in NHS resources and £ billion gap in Local Authority resources by 2012.

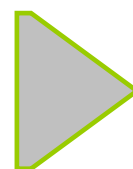
Valuing People Now required that NHS bodies transfer those 'resources' associated with the commissioning and provision of social care services to Local Authorities. The financial impact of this change will be a reduction in the resources for people with learning disabilities, as the money will not be ring fenced for them and Local Authorities are not able to apply the same inflation levels as the NHS.

In this context it is very hard to secure investment from local authorities or to rely on the community care budget for business income. It would be wise for us to show low and declining levels of investment required for the business and to focus on transition where there may be other sources of ringfenced government funding.

The public policy context however is favourable to our business. Over the last three years Government strategy has developed in a way which is potentially highly favourable to [provider organisation] given our experience and skill in advocacy, person-centred planning and connecting people to relationships and resources outside of the social care world. The policy commitment to inclusion and to personal budgets is unlikely to change with a Conservative government.

## **Core values**

The Connecting People business contributes to and draws from [provider organisation]'s longstanding core purpose and therefore our beliefs and expertise as a charity. This adds value to the service customers will receive and helps to keep business staff motivated.



## **Our purpose**

[provider organisation]'s purpose is to reduce the isolation and segregation experienced by people with learning disabilities and their families in [location]. We help them live life their way and to experience all the benefits that flow from richer and wider relationships: genuine safety, affection and growth.

## **Our values**

This means that we value:

- **A life that grows**

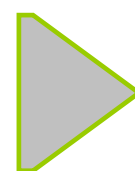
Many people with a learning disability have lives that stand still. The pattern of their activities and relationships, often not chosen by them, remains narrow and unchanged over decades. A full life with happy, memorable moments and a variety of challenges is our goal.

- **Connections that matter**

People with a learning disability often lack a network of people who might provide aid and support at times of difficulty. The ice under their feet is thin. Relationships – their depth and variety - are what keep us genuinely safe and genuinely independent. We support people to stand on the firm ground provided by relationships built up over a lifetime. Our goal is having real people around who aren't paid to care, they just do.

- **Everyone's contribution**

At present people with a learning disability are defined by what they need, rather than by what they can offer. To make change possible we need to believe in each person's capacity to contribute, to offer something that is wanted. We all have things we can't do and some things we can. Look beyond the "first glance" and you will see a wealth of abilities and talents. Our goal is to help build two way relationships where each offers something of value to the other.



- **Learning on the journey**

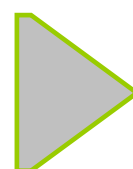
The twists and turns and ups and downs in life are what make us stronger. So does the chance to make mistakes, and the opportunity to learn from them. At present most people with a learning disability are protected from experiences for fear of the risks. But that's life! Every challenge and experience will develop new understanding, both for us and for the people we serve.

- **Standing together**

The relationship between [provider organisation] and the people we support should be a warm relationship of solidarity – not over protective, not based on 'I know what is best for you', not cold and task-centred with a focus on paperwork. It should be one of standing behind the person and looking through their eyes: 'I need some support, not a "boss"'. 'I need somebody to stand beside me, not in front of me.' 'I need to be asked not told.'

- **Passion**

We encourage people to figure out what it is they love and then do it. Dedication, zest, zeal, joy, devotion, excitement. If you experience these feelings you have found passion. Not only does it lead to happiness it fosters new connections as our enthusiasms touch others. As workers, our belief in what we do helps us do it better.



## 4. Marketing

### SWOT

**Strengths:** access to customers who already value what we do and trust us, experienced staff who communicate benefits well, technical skills, films of the work and guidelines written by us, focus group research to inform marketing

**Weaknesses:** service concept or definition can be hard to understand, developmental aspects of the service not well understood as activity provision and support is what people understand most and want, service was seen by focus group as instead of something more longterm and secure, a perceived need by some customers of permanence in support arrangements so that they can work

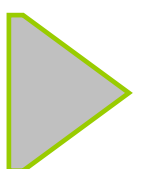
**Opportunities:** general acceptance of the social model of disability has grown and is more widespread and when linked to the increase in Individual Budgets, provides a huge potential

**Threats:** if the shift to personal budgets is not managed efficiently by the local authority ie assessment and other processes do not work efficiently and if they are perceived as a way of implementing cuts. This would lead to resistance and lobbying for traditional services

### Market research

Feedback from a focus group with 10 parents of young people aged 14 to 16. A suggested a number of perceived barriers to the acceptance of the Connecting People service:

- It will replace other, more permanent, services and is way of making cuts by the local authority
- Risk – a need for constant supervision and the impossibility of staff exiting



- A desire to protect children from rejection by the mainstream community
- A focus on ongoing supported activity and not valuing the need for activity that brings you into contact with non disabled people and develops you or changes the perception of you by others
- What if a community opportunity collapses what then?

These are the fears or barriers we need to overcome in our marketing order for families to want to buy our service. Resistance is based on a perceived threat to permanence in their child's support arrangements and a belief that greater independence and acceptance is not possible for their child. Connecting People will help to solve these problems of demand for personalisation by:

- giving intensive support to connect to mainstream opportunities or relationships thus developing a lifestyle post school outside of the social care world and demonstrating to families that this is possible
- building through that mainstream lifestyle the child's and the families' long term independence
- demonstrating to families the practical achievements that can be made by their child and reducing sensitivity to reasonable risk taking
- easing their acceptance of personalisation by giving practical help to make it work eg help know how to make budgets go as far as possible by taking up free or low cost community options or community based supports. Eg parents' most often asked question is 'what will my son and daughter actually do day to day?' Connecting People can provide practical answers that set up more independent patterns of life now and in the future. This replaces the carousel of child going to college and then re-entering the social care system three years down the line when college options are exhausted and the family demand help with 'care' in order to maintain their ability to work.



Once service delivery has begun, staff of the service are in constant contact with families and with people with a learning disability. At the end of each contact they spend time talking through with families what has been done and receiving their impressions and reactions. This is feedback into the service at an individual level but we also hold action learning sets once a quarter where we look at what we have learned which in turn helps us to reflect on what we are getting right and what we need to alter.

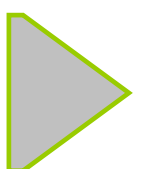
## **Distribution channels**

National reach is achieved through consultancy by staff for the Foundation for People with Learning Disabilities and the British Institute of Learning Disabilities. Customers reach us through the contacts and marketing efforts of those two organisations. We have been approached to do further work directly by training clients in the past too.

Local reach is achieved through the provision of our other services. Person-centred planning gives us access to schools and directly to families where we work one to one. The reach is always made through personal contact following a referral or introduction from school or the children's disability team. Self-advocacy groups give us access to day service users once a month in a group setting but not to their families. We have run groups for 15 years and are well known to most day service users. Our previous connecting work has also given us access to about 15 day service users and their families.

[provider organisation]'s website was launched two years ago and includes film clips of our work and a regular news page. The news page link is emailed to contacts but this is done erratically by staff and there is no unified set of contacts for the news page.

Our approach to this market will be informed by the results of the focus group research described above. The main focus of our marketing must be



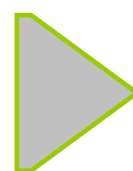
to assuage issues and fears identified in the focus groups. If we fail to do this customers will disengage and may even lobby for the retention of more traditional services.

We still need to research other markets for low cost low level interventions like 'small sparks' initiatives.

## **Strategic alliances**

Our strategic allies who may help leverage resources or increase access to markets are:

- Children and Young People's Strategic Partnership We will consider the fit with the Children's Plan. The 'making a positive contribution' sub-group of the CYPSP would welcome our focus on a group little engaged with in the children's plan so far except via the curriculum of special schools. Similarly the head of the CYPSP identified a gap in the Enjoy and Achieve section of the children's plan: actions are all about educational attainment because it is more easily measurable. There are no actions that increase enjoyment for young people. There is also very little evidence of the participation of young people with a learning disability in positive activities, a reporting requirement for the local area agreement. Our service could provide this.
- Heads of special schools meet as a group. We are in touch with this group about children's projects at [provider organisation] at our request and not as a regular agenda item.
- Special and mainstream schools affected by Building Schools for the Future. We depend on the co-operation of special schools to allow us into their schools, to share information and views with us, to speak well of us to parents.
- Children's Disability Services. Our relationship to date has been a funding and referral one. Children's services secured a Transition Support Grant which pays for person-centred planning. They will be





piloting personal budgets for children and we are partners in that pilot – useful learning for working with adults and deepening that relationship.

- Connexions – to date a referral relationship. Connexions perceive a need for social/leisure activities once young people leave school. Connexions cannot provide this support but find it is really needed. They say 'there never seems to be enough ordinary activity young people can get involved in or the support to do it'. They could promote our service as meeting that need.
- National Transition Information Network. TIN is an alliance of organisations and individuals who aim to improve disabled young people's experience of transition to adulthood. We have published in their families newsletter and presented at their themed seminars. We will continue to do so so that the work of the business is showcased.

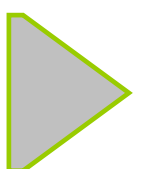
## **Marketing budget**

(Enter your text here)

Detail your marketing budget for the year. Explain how you will monitor it to manage and improve results.

## **Credibility and risk reduction**

- The marketing of the business will entail a large degree of assuaging customer fear and concerns
- We are a known and trusted organisation
- We are in contact with potential customers early
- We have comprehensive policies on risk and protection
- Well trained staff with clear roles and lines of responsibility and reporting



## 5. Team and management structure

### Skills experience, training and retention

#### Director

Overall responsibility for [provider organisation]'s operational and strategic management including evaluation of ideas and information from outside the organisation, regionally and nationally

Management of external relations, liaising effectively with public authorities and other contracting agencies, funders, partners and other agencies and individuals and ensuring that [provider organisation]'s achievements are brought to the attention of key decision makers and policy makers, locally and nationally

#### Deputy Director

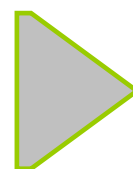
Her role is to assist with operational management and specifically to be responsible for the [provider organisation] premises and to be Health and Safety Co-ordinator.

#### Financial management

Together the Finance Manager and the Director of [provider organisation] set budgets and meet quarterly to review expenditure.

#### Connecting People Staff

All staff are experienced and trained in their work and bring successful experience, energy, creativity and commitment. [provider organisation] has a clear line management structure with clear areas of responsibility and accountability. We have a full range of policies and procedures which are read and discussed by the staff team. We have regular team meetings, supervisions and appraisals. Training records are kept for all staff in which training objectives, outcomes and further action is recorded. Training is in line with organisational and personal development needs. Our budget



allocates £500 per person for training and conferences per year. New staff will be trained by the [provider organisation] Director

### **Incentives and motivation**

A culture of permission operates at [provider organisation] in order to enable staff to be imaginative and motivated about their work. That means a relatively flat hierarchy with hierarchical authority operating on demand ie only when needed. This means for example

- encouraging the individual strengths and creativity of team members and allowing them to use these in their work
- not requiring staff to seek approval (usually layers of approval) before they can act or make a decision
- helping staff to figure out the best way to do their work rather than giving them instructions and rigid templates
- always being approachable and supportive so that staff don't end up feeling abandoned rather than empowered
- making it easier for them to make mistakes sometimes and take reasonable risks

In order to motivate and retain staff we aim to make sure that staff

1. know what is expected of them at work
2. have the materials and equipment to do their work right
3. have the opportunity to do what they do best every day
4. regularly receive recognition or praise for good work
5. feel that a manager or someone at work cares about them as a person?
6. know that their opinions count

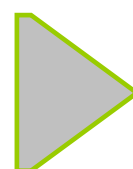
## **Management systems**

### **Human resources and health and safety management systems**

All policies and procedures in the Staff Handbook Welcome pack

Absence Request

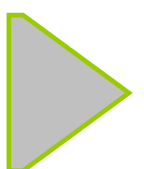
Admin procedures and forms



Cash policy  
Code of conduct  
Confidentiality  
Dealing with Conflict  
Complaints  
Disability  
Employment Contracts  
Equal Opps and Equalities  
Expenses Sheet  
Fire procedure for drop in centre  
Getting members involved policy  
Children's Policy  
Holiday Entitlement  
Lone Working and Personal Safety  
Recruitment  
Redundancy and Job Security  
Risk  
Self-Certification Illness Form  
Strategy  
Staff Appraisal and Supervision guidance  
Vulnerable adults policy  
Timesheet  
Values and beliefs of Inclusion  
Volunteer Agreement and Policy

### **Financial management systems**

We use quick books software. We can produce financial reports six monthly.  
Finance manager does payroll and pays tax invoices.



## 6. Financial budgets and forecasts

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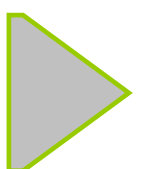
Financial illustrations are shown in Appendix II and suggest.....

- Profit and loss forecast
- Cash flow forecast
- Balance sheet forecast
- Capital expenditure budget
- Break-even analysis

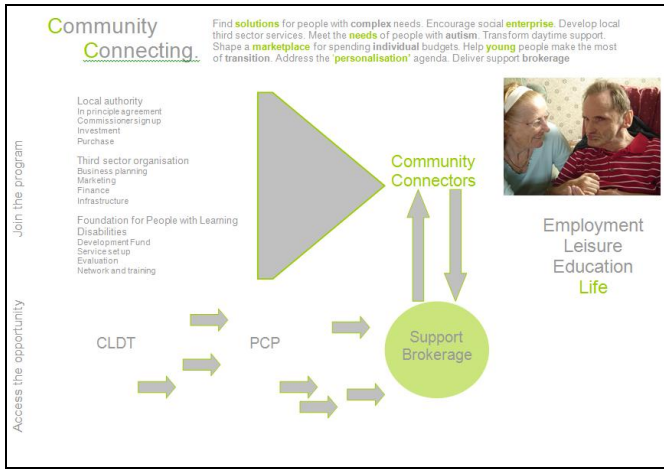
Provide brief notes on each of these forecasts. It's a good idea to produce Optimistic, Pessimistic and Realistic versions of the first three.

If the cash flow forecasts pinpoint future cash flow difficulties, explain how you plan to deal with these challenges.

Financial information on which the options described in the financial model above were based



# Appendix I – Flyer



### Community Connecting

Community connecting forms a part of support brokerage for people who would benefit from the additional depth and intensity that it offers. The added value of community connecting is that it can find solutions for people with the most complex needs and reduce reliance on more expensive specialised support. Community connectors work with individuals and the people close to them to find out their strengths, talents and interests. They then link up individuals to opportunities in their area. The key to community connecting is that it goes beyond simply helping people to be in the community. It is about establishing strong, mutually beneficial relationships. To make it happen requires skilled and experienced workers who are creative and flexible. It is a simple and cost-effective service that can be funded from a number of sources, including individual budgets.

#### Anticipated Outcomes

- Customer / Consumer convergence
- Feedback
- Quality Assurance Mechanism
- Improved outcomes for People
- Cost-Effectiveness
- Sustainability
- Increased market capacity

#### Community Connecting Programme

Community Connecting is a new project run by the Foundation for People with learning Disabilities and supported by Grapevine.

For more information contact Molly Mattingly [mmattingly@fpd.org.uk](mailto:mmattingly@fpd.org.uk) or Paul Swift [pswift@fpd.org.uk](mailto:pswift@fpd.org.uk)

### Anoop's Story



Once, **Anoop** was a man in his thirties with high support needs, went to college and stayed at home.

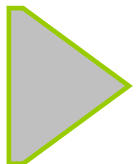
He had no life outside the family circle. Darren a community connector observed Anoop's gifts – being kind-hearted, talkative and having an appetite for life – and worked with him to use these gifts to enjoy fresh opportunities.

He appreciates good coffee and together they sampled all types of coffee from macchiato to lattes in cafes from small and independent to busy chains in bookstores, all over Coventry and Birmingham. Darren discovered that Anoop was an eager sports fan but did not go to any games or take part. To gauge his interests Anoop experienced different sports from football to ice hockey.

He started to attend Coventry & North Warwickshire Hockey Club where at first he watched practice sessions and spoke to players. Darren got to know the club's organiser, Simon and spent time with him. Simon both understood what Darren was trying to achieve and could see a mutually beneficial role for Anoop to play in the club.

Two years on **Anoop** is photographer for the club's website and organiser of the zone (wheelchair) hockey section. He is a popular regular at the clubhouse.





# Appendix II – Financial illustrations

