

Brothers of Charity Lancashire

Annual
Report
2008

Priorities
2009



Introduction

This booklet gives a short annual report for 2008 outlining some of the achievements and challenges during the previous year, as well as highlighting some of the priorities we have identified for 2009.

We support over 240 people with a learning disability to lead more independent lives and claim their rightful place as valued citizens within both their local communities and in society in general. The key principles underlying all aspects of our work are respect, choice, rights, independence, relationships and inclusion.

We employ over 400 members of staff to deliver a range of services including: supported living services (domiciliary support), registered nursing care services, individualised day services, social enterprises and supported employment.

This is an interim document for the ongoing development of our strategic plan (a vision for our services into the future). We are committed to ensuring that all stakeholders are given the opportunity to comment on and contribute to our strategic plan and will be starting this work early in 2009.

Nicola Howell
Regional Director of Services

Our mission statement

"With the person at the heart of all that we do, we are an organisation with Christian values, whose vision is to provide services which support people's individuality, choice rights and dreams."



Achievements & Challenges 2008

Major Achievements and External Accreditation



'Commended' award received from the Lancashire Business Environment Association in the start-up category for Crafty Solutions, our newly established venture providing training opportunities in the recycled art and crafts material store.

Finalist in the Social Enterprise category for the Lancashire 'Be Inspired Business Awards'.

Winners of the Chorley Smile Award in the Working Together category, achieved by our Integrated Retirement Services.

New community bases established for Connections Chorley at Steeley Lane, Chorley and Connections South Ribble at King Street, Leyland.

Quality Checkers service evaluation completed using REACH standards for the Whittle supported living scheme, which involved external providers.

Supported Living Services review: Lancashire County Council completed their two year review and the draft report included the following narrative:

'...all of the services reviewed were found to be of a very high standard, person centred with a real focus on meeting the outcomes for the people being supported. There are some excellent examples of good practice across the service.'

Health at Work Award Bronze Level achieved, recognising our commitment to employee health and well-being.

Chartermark Award accreditation attained for this customer-focussed quality standard.

City & Guilds External Evaluation of our NVQ programme, resulting in an excellent outcome.



Major Challenges During the Year

Onsite Registered Care Services achieved further planned reductions in the number of people living at Lisieux Hall from 75 in 2002 to 11 in December 2008, and introduced an improved process for the identification and monitoring of service deficits.

Commenced a **feasibility study** to investigate options for registered nursing care services which the service may be able to offer into the future.

Substantial funding reductions in income in Supported Living Services were absorbed by stringent budget efficiencies. Ancillary services including transport and speech therapy were successfully withdrawn.



Commenced a **review of supported living services** into a wider benchmark/comparison process.

Systems were established within the Connections services for the **recovery of non-pay costs** for travel and leisure admissions from individuals and families, where this does not form part of the commissioned service.

The **Senior Management Team was restructured**, in-line with Trustee objectives for future corporate structure and releasing further cost efficiencies.

Involvement of Service Users was promoted in recruitment and links to local service user networks.



The Facts & Figures

Our Financial Results 2007/08 (£ sterling)

Summary Balance Sheet at 31 March 2008

	2008
Fixed Assets	<u>84,145</u>
Current Assets	4,979,916
Current Liabilities	<u>(763,259)</u>
Net Current Assets	<u>4,216,657</u>
Net Assets / Reserves	<u>4,300,802</u>
Our Reserves are made up of:	
Unrestricted Reserves	3,103,192
Designated Reserves (funds committed for specified future expenditure)	1,171,778
Restricted Reserves (funds that can only be used for specified purposes)	<u>25,832</u>
	<u>4,300,802</u>

Summary Income & Expenditure

	Unrestricted Funds £
Income	9,408,451
Expenditure & Transfers	<u>(9,342,392)</u>
Net Movement	<u>66,059</u>



What we spend our resources on

Over 81% (£7.6 million) of our costs were expended on salaries, wages and related employment costs.

Of the other various types of expenditure incurred, no single category was over 2%; the largest costs being in respect of Property Rental (£160,000) and Electricity, Heating & Water (£133,000). We incurred over £108,000 on insurance premiums for the services we provide.

How did we do?

Despite the difficult financial climate, we achieved a near break-even on unrestricted funds.

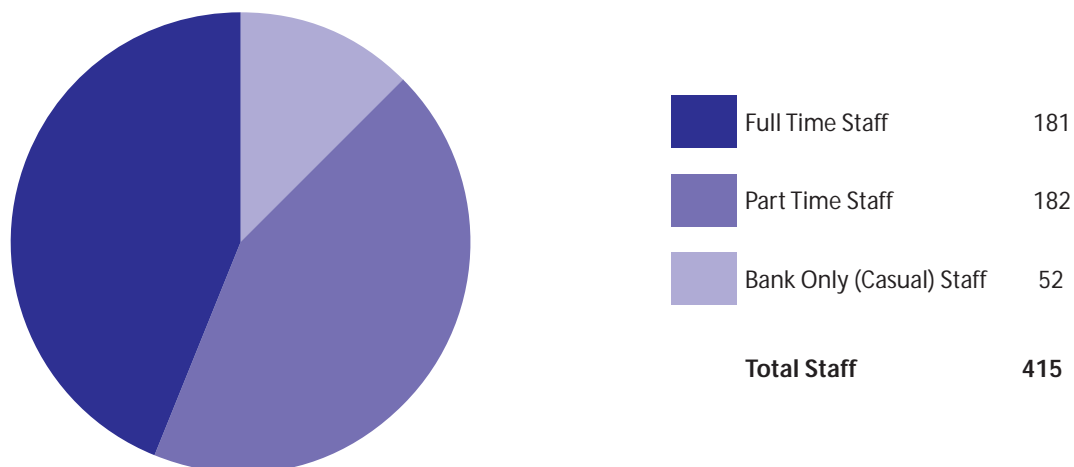
With Trustee approval, some funds have been designated for ongoing pay negotiations, development for the bakery premises and the staff reward for efficiency savings made to date.

Reserves remain healthy and exceed the National Reserves Policy targets.

Other data

Staff Numbers

During the year we employed 415 staff; a breakdown is shown below



Staff Turnover

The level of staff turnover (people commencing and leaving employment) was 11.5%. If we exclude people who left for 'unavoidable' reasons (eg retirement), this was 8.3%.

By comparison, the national average for the 'non-manual' business sector was 19.2% (EEF survey 2008).

NVQ Statistics

214 Support staff and managers providing direct support services have, or are in the process of gaining, an NVQ – this represents two-thirds of all staff in these areas.

Business Plan

Priorities and Objectives for 2009

During 2009, we will prepare a full **Strategic Plan** which will set out a strategy for 2009-2011. We are committed to involve all stakeholders in the preparation and consultation processes for this plan. In the meantime, we have identified the following priorities and objectives which we will take forward:-

We will....

- Continue to focus on **budget efficiencies** to accommodate funding pressures in the reduction of rates for care and support.

Within our Supported Living Services, this work will focus on the detailed service evaluation of team structures and roles including consultation and comparators to develop sustainable models of service delivery.

Within Day Services, we will work with commissioners in the detailed review of day services and the costs associated with the provision of quality services.



- Engage Commissioners in **future service options** for Registered Care Services by continuing our comprehensive review, which links with the outcomes of individual service user needs and exploring best practice.

We will continue to identify opportunities for people to move into community-based services where this forms part of their individual plans

- **Promote service user advocacy and involvement**, both within our services and within regional consultation networks. We will also seek ways to **engage families** and ensure they remain informed of service and commissioning developments.

We will seek opportunities to canvas customer satisfaction and will ensure this important feedback is integral to our future plans.



- **Promote independence & choice** by the development of services within independent flats, similar to sheltered housing, which are currently only accessible to older persons.

We will work with commissioners in pilot 'individual budget' projects which give service users more control over the support they receive.

We will research a range of different housing options for individuals.

- **Make day activities more inclusive** within local communities, for example:-

~ Art Services aim to relocate and engage with commercial facilities for local artists.



~ Astley Bakery will undertake a review of the facilities and service offered, seeking to improve the inclusive nature of the service provided within a modern vibrant business.

~ Jobspec supported employment service will building on their success to date and aim to increase outcomes for individuals which result in sustainable paid employment. The team will work towards the Matrix quality standard.

~ Landbase Services will continue to work in partnership with local councils to establish community facilities within the renovation project of the Victorian walled garden at Worden Park and to relocate Pets Corner to Astley Park. A detailed feasibility study will be undertaken in respect of potential for recycling opportunities.

~ Integrated

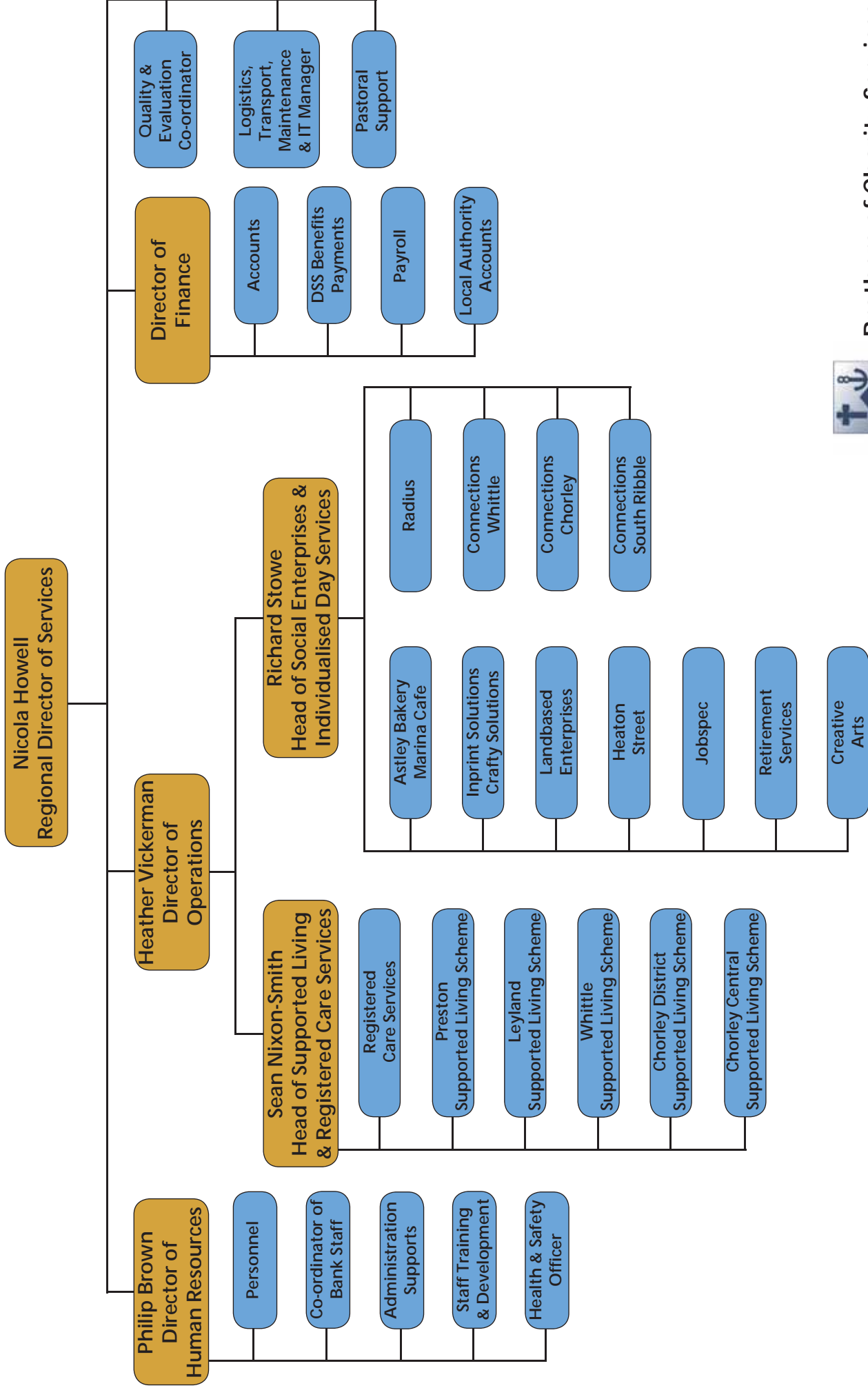
Retirement Services will expand links with other local services to elderly people, promoting access to mainstream funding, to enhance this important aspect of these services.

~ Offer the opportunity for people who access Social Enterprises to gain nationally recognised qualifications.



• **Support Systems** will be reviewed to assess the potential impact of individual budgets and how the administrative, financial and quality support systems may need to adapt to support these new ways of commissioning services. Internal management information systems will be reviewed and focussed to enable effective monitoring of performance.

• **Develop our website** and link with longer-term marketing strategies, in the move towards individualised budgets and the need to start promoting our services more widely.



Brothers of Charity Services
Lancashire

January 2009

Organisational Structure
Who's Who

Further Information

Please do not hesitate to contact us about any aspect of our service and the support we provide. We value your feedback.

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