

# Transforming Lives Together



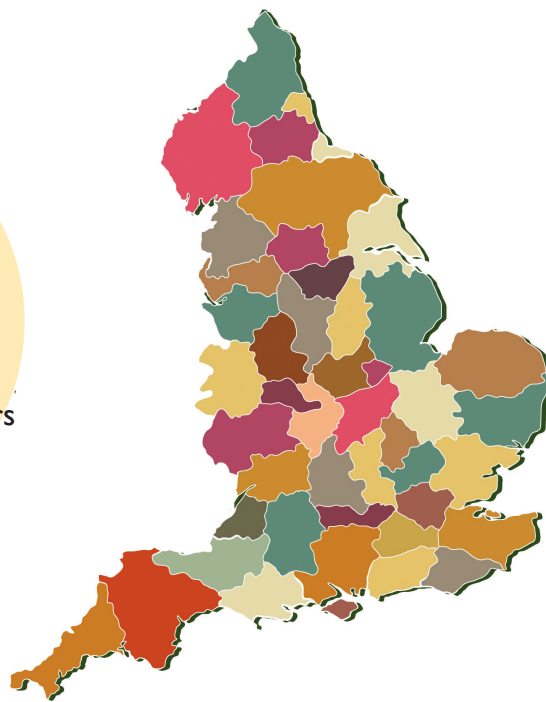
## Strategic Plan 2017-20

April 2017

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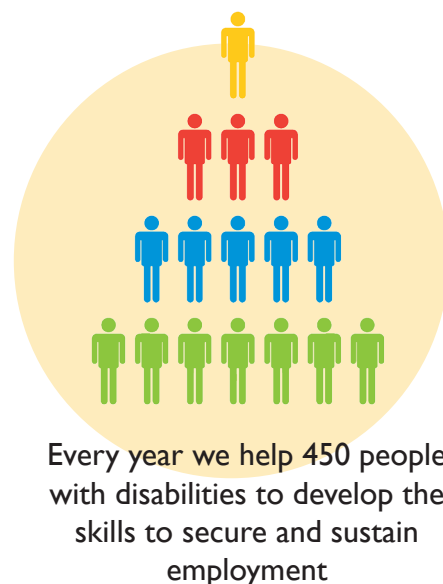
# About us



Established in 1974

Main offices in Witney, Leicester, London, Solihull and Camborne

We work with 44 local authority areas in England



# Our vision

*To transform the lives of people with a disability or mental health condition by providing the best quality housing, support and employment services - to enable them to live the lives they choose, achieve their personal goals, feel valued and know their voices are heard. Together, we transform lives.*



Sally moved into a supported housing property in 2016. She is an active member of the Advance Operations Board – a forum for customers and Board members to discuss strategic and nationally relevant topics regarding operational activity.

'Advance really has transformed my life. Moving into my home has helped me build new friendships and led to me finding a job in a local coffee shop. This year I was able to host Christmas for my parents and cook for them in my own home. Having my own place is fantastic.'

Being on the Operations Board meant I got to feed into the future vision. I thought about the positive things Advance has given me: health, peace of mind, safety, security, and dignity. I am fully involved in all the decisions about my life with input from my family and support team. Advance really has transformed my life. That's why we chose 'Transforming Lives Together' to describe the strategy.'

*Sally*

# Our values

**P**

*Partnership - we work in partnership with our customers and build relationships with others that help us serve our customers better*

**R**

*Respect - we treat our customers, colleagues and others as we would like to be treated*

**I**

*Innovation - we are keen to try new things - especially when we can make things better for our customers*

**D**

*Drive - we do the right thing at the right time and everything we do is driven by our customers' needs*

**E**

*Efficiency - we make best use of our resources, maximizing efficiency, so we can deliver the best services for our customers*

Philip Jackson recently celebrated his 20th anniversary of joining Advance.

'I genuinely love working for Advance – it is a special organisation and we do some amazing things. The work we do helps customers achieve their goals and ambitions and I am hugely proud to be part of Advance.'

*Philip*

Chief Executive Julie Layton said: 'Philip has been a great asset to Advance over the years. He and his team ensure our systems run smoothly so that we can deliver excellent services to our customers. Philip was involved in the development of our PRIDE behaviours and is an excellent role model, displaying our values in all of his work.'





Katie is a shared ownership customer in Oxfordshire. Shared ownership enables customers to buy their own home and live independently.

'I like it because I don't have to depend on anyone else now. My future now looks happy, comfortable and independent.'

*Katie*

Katie's Mum Lala said: 'It is a complicated process, but Advance explained everything and made it so easy for us. Katie's new neighbours were wonderful from day one.'

'It's a relief to know she's happy and secure. If I wasn't around I know she would be OK as she has her own home for the rest of her life.'

*Lala*

# Introduction

We are working and living in a challenging operating environment and in many ways it is even more difficult for people with disabilities and mental health conditions. In today's economic and social climate our customers' needs can often be overlooked.

Our unique business fundamentally supports the right of our customers to increase their independence - to live the lives they choose, achieve their personal goals, feel valued and importantly have their voices heard - this is our Vision.

This document sets out our strategic intent for the next three years in order to achieve and maintain this Vision.

Despite the ongoing financial pressures and constraints, we aim to maintain and continuously improve the high quality personalised services that we provide to our customers and we continue to challenge the norms of society. We will help as many people as possible who need or can benefit from our services and we will deliver our high-quality, innovative and personalised services to our customers in housing, support and employment. Last year was one of transition for Advance. We appointed new Board members and restructured the executive and senior management team, with key Director appointments bringing in new skills and expertise. These changes ensure we have the right talent to deliver on our promises to our customers and commissioners as set out in our long-term strategy.

We are aware of our responsibilities and our accountability to commissioners and regulators, to customers and their families and to our dedicated staff and we are committed to meeting those responsibilities. Our strategies have been developed with these in mind.

At the heart of our new approach is a robust framework for the management of risk, at both the strategic and operational level. We have



considered the risks around delivering our 2017-20 strategy, and our Board is clear on its appetite for risk in steering the organisation forward.

I am confident that our 2017-20 strategy will deliver leaner, more efficient services for our customers, motivate our staff to achieve their best and ensure our customers have a meaningful say in our work. The strategic ambitions will ensure we continue to innovate and grow our services by partnering with others to meet and anticipate customers and commissioner needs. The strategy will deliver value for money and secure our long-term financial stability, so that we can invest and grow.

We are an outward looking organisation and are keen to work with others to deliver, improve and grow the services we offer. We will continue to look for partner organisations to help us to transform more lives. We want our voice and that of our customers to be heard on the issues that matter to us all.

I am incredibly proud to lead an organisation that puts the customer at the heart of everything it does. I hope you enjoy reading our plans for the future.

A handwritten signature in black ink, appearing to read 'Julie Layton'.

**Julie Layton**  
Chief Executive

# How it fits together

The diagram below shows how the elements of this strategy come together to ensure we remain focused on delivering our vision and living our values.





# Executive summary

This document sets out our strategic plans for 2017/20. We are operating in a challenging environment. The impact of welfare reforms leading to ongoing rent reductions and the introduction of the Local Housing Allowance (LHA) cap in 2019/20 present long-term challenges for supported housing providers. We are also seeing the need for commissioners, national and local Government to procure support and employment services with a decreasing budget – but to the same high standard.

Our response has been to make changes to position ourselves to both survive and thrive in this more challenging environment.

## Strategic Context

In the coming years we predict a number of specific challenges will continue to impact on our activity. These include:

- Continued reduction in long-term capital grant funding from the HCA to fund the development of new homes, resulting in us having to seek alternative sources of grants
- Requirement by Government for housing associations to reduce rents by 1% per annum until 2020 and the introduction of the 'Local Housing Allowance' cap on supported housing rents from 2019/20
- Pressures on local authority budgets impacting the support services they commission
- New frameworks for provision of employment services on behalf of the DWP means we need to develop relationships with new partners to maintain and grow our services
- Uncertainty around the impact Brexit will have on Government policy and the economy

Darryl moved into a ground floor flat at Advance's extra care scheme in Cornwall in April 2016 having previously lived at home with his mother.

Darryl loves meeting people. On a recent visit by Baroness Warwick, Chair of the National Housing Federation, Darryl proudly showed her around his home, describing all of the photographs he has chosen for the walls and the models he makes in his spare time.

Speaking at the one-year anniversary of the scheme opening, Tori, Darryl's mother, said: 'Darryl has grown more in confidence during the last six months than he did during the previous ten years.'

*Tori*



We have responded to these challenges by changing the way we work to sustain and improve performance. Specifically, we have:

- Maintained strong customer satisfaction with our services (78% of customers saying they are very or quite happy with our services) and seen the positive impact we have on our customers' lives (74% of customers saying Advance has made their life a lot or a bit better in the previous twelve months and 86% saying they feel in control of their lives)
- Improved the quality of our services, ensuring they are truly customer led, supported by an efficient and effective business assurance function
- Embedded our PRIDE behaviours (focused on Partnership, Respect, Innovation, Drive and Efficiency) putting our customer at the heart of everything we do
- Achieved cost savings of £1.8m over the last two years and ensured value for money is a key focus for all staff.

Despite the challenges facing the sector we believe we are well placed to address them and take advantage of the opportunities that may present themselves in the years ahead. The Government's 'Transforming Care' programme for people with a learning disability or autism means more localised housing and support is needed. The 'Five Year Forward View for Mental Health' sets out the growing demand for our services. We have great strengths and expertise and offer unique services such as Home Ownership for people with a Long-term Disability (HOLD). We are also well positioned to deliver more services, whether by ourselves or in partnership with others.

## Strategic Overview

Our strategy for the next three years focuses on five key areas identified by the Board and Executives in consultation with staff and customers; they will shape and guide what we do over the coming years. We have set clear and ambitious targets, which we aim to achieve by 2020.

### Excellent services

We aim to deliver the best possible services to our customers and be their provider of choice. We will meet or exceed their expectations, ensuring people achieve their personal ambitions. We will measure our success by asking our customers what they think of our services, as well as by external validation, aiming to achieve and sustain high ratings on both fronts.

We will improve the overall quality of our homes, including the provision of more self-contained or en-suite accommodation. As the provider of choice, more of our customers will want us to deliver both housing and support services. We also aim to provide work-related support to more customers, helping them to achieve sustainable employment.

In a challenging external environment, we will continue to innovate across all of our services to secure better value for each pound spent and grow our services. We will seek new models, ideas and ways of working that fit the financial constraints and the different situations of those who seek services from us.

## Workforce excellence

We will develop a professional, stable and motivated workforce who have the knowledge, skills and commitment to deliver excellent customer service and whose wellbeing is paramount. We will support our staff to be professional experts in practice, sharing their knowledge and expertise with colleagues. We believe that motivated staff deliver great experiences for our customers and we will keep investing in our staff and their wellbeing. We will listen and respond to their views and do all that we can to make Advance a progressive and supportive place to work.

## Engaged customers

We will work collaboratively with our customers to ensure they have a meaningful say in the design and delivery of our services. We want to make sure we communicate effectively with our customers across the organisation so that they are in control of their own lives, and the choices they have available to them. Outside the services we provide, we believe we have an important role to play in supporting customers to engage in their local community and ensure they, their friends, families and advocates have their voices heard on issues that matter to them.

## Sustainable growth

We aim to consistently grow as an organisation so that we can support more people and transform more lives. We aim to grow in areas where we know we can deliver excellent housing, employment, and support services. We want to develop innovative services in places we know we can recruit excellent people to deliver excellent services that meet and anticipate commissioner and customer needs. We will actively identify and work with partners, other agencies, families, friends, advocates and volunteers to achieve our ambition, improve and expand the range of services we provide.

## Financially sound

We will generate sufficient income to meet the forecast needs of the business. Each operational area of the business will make a positive contribution to the overall surplus of the organisation. We will continue to deliver demonstrable value for money so that we can show how our investment achieves maximum social value for our customers. We want to secure our long-term financial viability and have long-term funding in place to support our future development plans.

Arne and Paul, live-in volunteers, share a home with Advance customers Tony and Jerry. They provide additional opportunities for customers to do things they enjoy, such as a recent trip to Brighton. Arne said: 'We had a lot of fun. seeing Brighton and had a great day with Tony and Jerry at the seaside'.

'I had a brilliant time. I want to go to Brighton again. Having a good time somewhere makes me want to visit other places in future'.

*Tony*



# Business Performance Indicators

We have set clear targets that allow us to measure our success. Wherever possible these targets are SMART (specific, measurable, achievable, relevant and time-framed).

Strategic objective	Ambition	Business Performance Indicators for 2020
Excellent services	Deliver the best possible services to our customers, meeting or exceeding their expectations and becoming the provider of choice.	<ol style="list-style-type: none"> <li>1. Customer satisfaction to exceed 85%</li> <li>2. All services achieving at least “Good” CQC rating, with 30% of those re-inspected achieving “Outstanding” rating</li> <li>3. Each year we will set aside an agreed proportion of our surpluses to improve and expand our housing stock. At least 25% of this ‘internal fund’ will be spent on improving homes for existing customers</li> <li>4. Increase by 50% the number of people living in Advance properties who also purchase support services from Advance</li> <li>5. 80% of people we help get into work sustain their employment for more than 13 weeks</li> <li>6. Have in place a minimum of 250 active volunteers supporting engagement activity and promoting awareness of our work</li> </ol>
Workforce excellence	Have a professional, stable and motivated workforce that has the knowledge, skills and commitment to deliver excellent customer service.	<ol style="list-style-type: none"> <li>7. Achieve overall employee engagement/satisfaction of 80%</li> <li>8. 100% of support and customer-facing staff complete mandatory induction training within 12 weeks of commencing employment, with ongoing mandatory and professional training and development maintained at 100% compliance.</li> <li>9. Effective workforce plans in place for 100% of services – delivering to agreed recruitment, retention, training and development BPIs</li> <li>10. Increase to 90% the number of staff who feel they have access to the development and training they need to do their job effectively and meet their personal and career development goals</li> <li>11. Achieve staff voluntary turnover, stability index and staff vacancy rates which are in the upper quartile of sector performance</li> </ol>

Strategic objective	Ambition	Business Performance Indicators for 2020	
Engaged customers	Work collaboratively with our customers to ensure they have a meaningful say in the design and delivery of our services and have their voices heard on issues that matter to them.	12.	70% of customers have a meaningful say in design and delivery of our services
		13.	60% of customers believe Advance helps give them a voice on issues that matter to them
		14.	75% of Support customers to engage in at least one local community activity
		15.	60% of customers are actively involved in an Advance engagement activity
		16.	Increase by 30% the number of customers, their friends, families and advocates who are engaged with campaign activity or other pro-active Advance campaign activity
Sustainable growth	Consistently grow, improving and expanding the services we provide so that we can transform more lives.	17.	Increase the number of Housing customers from 2,400 to 2,600
		18.	Increase Support Services revenues by 25% (achieving a minimum of 15% contribution)
		19.	Win at least 70% of Support Service contracts bid for
		20.	Increase the range of employment support services and maintain revenue
		21.	Develop services for people with complex health and/or social care needs and grow the number of customers benefitting from those services by 25%
Financially sound	Generate sufficient income, deliver value for money as well as positive social value and secure our long-term financial viability to support our ambitious plans.	22.	Achieve annual accounting surpluses with a cumulative surplus over the three years to 2019/20 of £2.1m
		23.	Achieve cost savings of £1.2m per annum (by 2019/20) across the organisation
		24.	Reduce central overheads from 13.6% to 12% of income
		25.	Generate 125% of the annual cash needed to meet operational needs including capital component replacements
		26.	Bring housing costs down to peer group level and ensure all housing assets have a positive net present value (NPV).

# Our strategies

Over the course of the next three years we will focus on a number of strategies to support the achievement of our long-term objectives and deliver against our 2020 Business Performance Indicators (BPIs). Some of these will take longer than others, but all are essential to help us realise our vision and fulfil our ambitions. Each will have a clear leader, accountable for progressing the work and collaborating with staff across the organisation to deliver against agreed plans.

In the table below you will see the strategies plotted against the 2020 BPIs they support.

Activity	Business Performance Indicators for 2020
Build customer satisfaction by delivering an excellent customer service experience by investing in our operating systems and improving our processes	1, 2, 4, 6, 12, 13, 15
Create a collaborative culture focused on delivery through clear leadership and effective engagement and motivation of our people	6, 7, 10, 11, 12
Become a champion for “Disability Confident”, achieving Level 3 – Disability Confident – Leader status	1, 5, 7, 10, 21
Develop high performing teams, nurturing talent, creating an environment where people achieve their full potential and deliver service excellence	1, 2, 5, 7, 8, 9, 10, 11
Ensure all mandatory training is delivered effectively and at the right time	1, 2, 7, 8
Create a modest Innovation Fund for the period of the plan, to which staff and customers can bid to help research or develop a new idea or new model of service delivery	17, 18, 19, 20, 21, 22
Develop innovative approaches to effectively engaging customers, their families and others, such as volunteers	1, 12, 13, 14, 15, 16
Grow our existing markets by building strong relationships, delivering service excellence and offering innovative solutions to meet commissioners’ needs	4, 5, 17, 18, 19, 20, 21, 22
Proactively seek partnerships and possible merger and acquisition opportunity	17, 18, 20, 22, 24
Invest surplus funds to enter new markets, capitalising on our track record and experience and drawing on our integrated capabilities	17, 18, 19, 20, 21, 22
Achieve Value for Money by managing our housing assets effectively	1, 3, 26
Achieve Value for Money by improving Customer Service and efficiency across the organisation	1, 2, 3, 9, 23, 24, 25, 26
Improve understanding of who we are by creating better brand awareness and support for our work, including seeking a high-profile patron to be a public face for the organisation	1, 7, 12, 13, 14, 15, 16, 17, 18, 19, 21, 22
Ensure that risk management and governance is embedded through robust, consistently applied policies and procedures	1, 7, 12, 17, 18, 19, 20, 21, 22, 23, 24
Invest in technology that gives us a competitive edge to create efficiency, optimise quality, service delivery and position us for growth.	1, 2, 7, 12, 17, 18, 19, 20, 21, 22, 23, 24, 25, 26.

# Objectives for Year 1

In 2017/18 we will:

## Excellent services

- Improve our operating systems and processes so our people are supported to deliver excellent services and we achieve an 80% customer satisfaction result
- Audit all our support services ourselves and aim achieve at least the equivalent of CQC 'Good' and identify what is needed to move from 'Good' to 'Outstanding'
- Deliver our Housing Development Plan and Asset Management Plan, resulting in overall improved housing stock
- Increase by 20% the number of people living in our properties who also receive support services from Advance
- 80% of people we help get into work sustain their employment for more than 13 weeks
- Ensure customer involvement in recruitment to ALL customer facing posts
- Recruit 100 volunteers to support engagement activity and promote our work



Danny is a Support customer who took part in Advance's 'We Are Artists!' exhibition at Hackney Museum for Disabled Access Day 2017. The exhibition included sculpture, framed photographs and a huge collage of portraits and puppets by artist, Manzur.

Danny attends a weekly art group which has been held at the museum since March 2016.

The partnership with the Museum was developed by the Advance Community Aspirations Team, based in London.

'I love going to the art group every week and drawing with my friends. I really enjoy it.'

*Danny*

## Workforce excellence

- Design and deliver an employee engagement survey and action planning process to address areas for improvement
- Audit and deliver enhancements to our current employee communication and consultation activity
- Introduce new induction and monitoring processes to ensure all support and customer facing staff have completed mandatory induction training within 12 weeks
- Deliver a 'Talent Review' process to support the development of workforce planning across the organisation
- Collate and update data on staff professional qualifications, continue to encourage professional development whilst optimising our approach to apprenticeships in the context of the apprenticeship levy and funding
- Deliver a map of required training for roles within our support services, from induction through to specific customer care needs
- Review pay and benefits structures – ensuring they remain competitive, affordable, support effective recruitment and retention and that staff understand their pay and benefits
- Research and agree benchmark indicators and longer term targets. Maintain and improve workforce indicators including Voluntary Turnover, less than 12% pa, Stability Index, more than 80%, Staff Vacancy Rate, <3% (all staff), <7% (Support staff)

## Engaged customers

- Reinvigorate customer engagement activity aiming to see 50% of customers report feeling they are listened to and have a meaningful say in the design and delivery of our services
- Establish a baseline percentage measure of customers who believe Advance helps give them a voice on issues that matter to them
- Establish a mechanism to measure percentage of Support customers engaged in at least one local community activity
- Deliver a programme of activity which sees 25% of all customers actively involved in at least one Advance engagement activity
- Run two campaigns to serve as an opportunity for customer families and advocates to get engaged with the work of Advance
- Increase friends and family involvement in current customer engagement activity and consider creation of friends and family or advocate panel to increase engagement and feedback about our services



## Sustainable growth

- Deliver 100+ new homes (with the majority expected to be shared ownership) Increase support services revenues by 10% (making a 13% contribution)
- Agree marketing and development plans for each region to deliver 10% growth in support service revenues
- Be successful in achieving 50% of the contracts for which we bid
- Explore new opportunities to deliver other employment services and successfully win at least one contract
- Develop services for customers with more complex health and/or social care needs and grow their number by 10%

## Financially sound

- Deliver 2017/18 budget to target and achieve £503k planned surplus
- Maintain the £500k per annum of savings (based on 2015/16 budget baseline)
- Develop plans to deliver additional savings of £700k per annum by 2020
- Utilise benchmarking data to identify areas of expenditure which are higher than our peer group - and develop action plans to address
- Deliver operational plans to generate contribution of at least 13% of turnover from each Directorate
- Develop an asset management strategy, which addresses all properties that are assessed as having a negative net present value (NPV).

Theresa, an Advance Housing customer, sits on interview panels and the National Forum giving the customer view on our services. She works at Advance head office as a gardener in the Summer and helps out in the office during the Winter. Marie, Theresa's manager said: 'The job gives her responsibility and gets her out and about.'

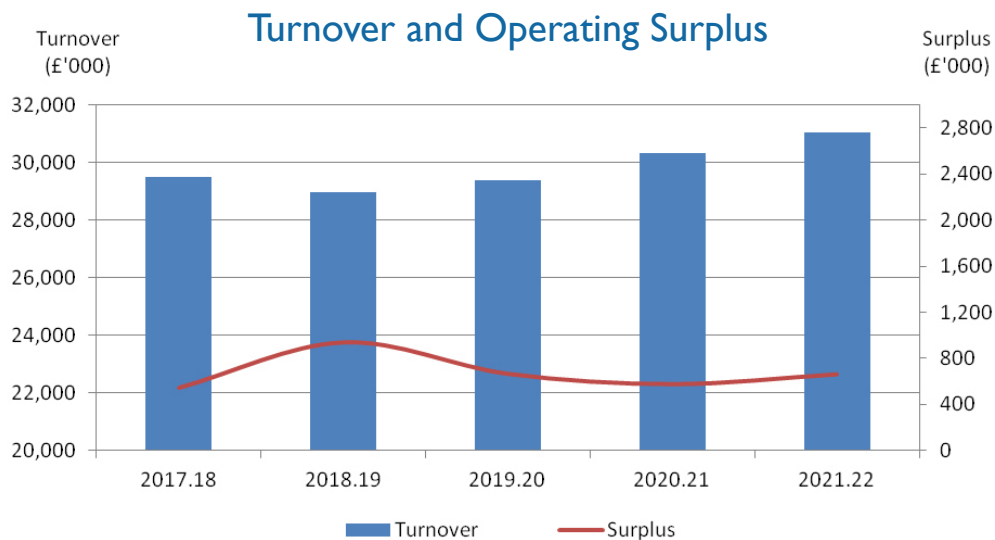
'I really enjoy my job. I've been working here for just about a year. It's nice to be out in the fresh air doing something I enjoy. Working here is lovely – it's great to meet people. You can't be miserable when you're working and have a job to do!'

*Theresa*

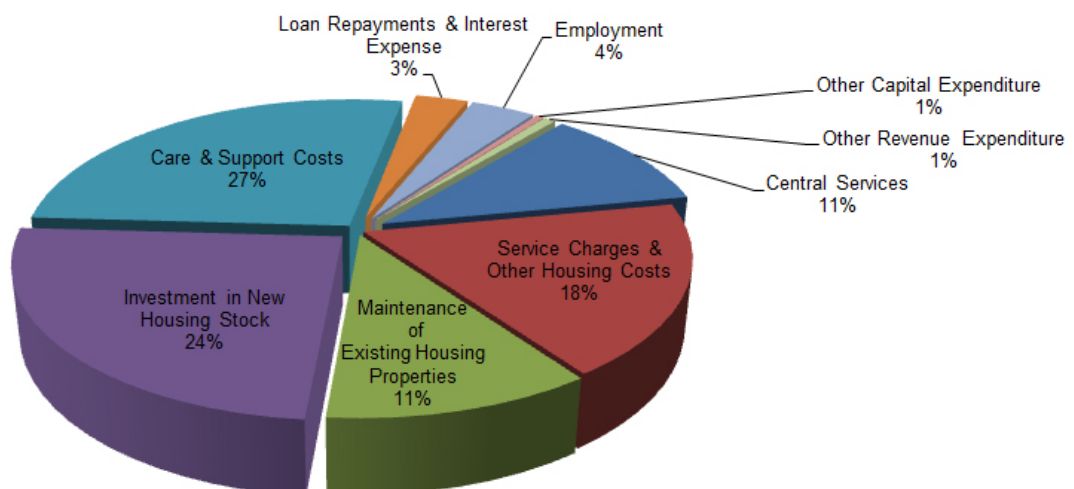


# Appendix: Financial forecasts

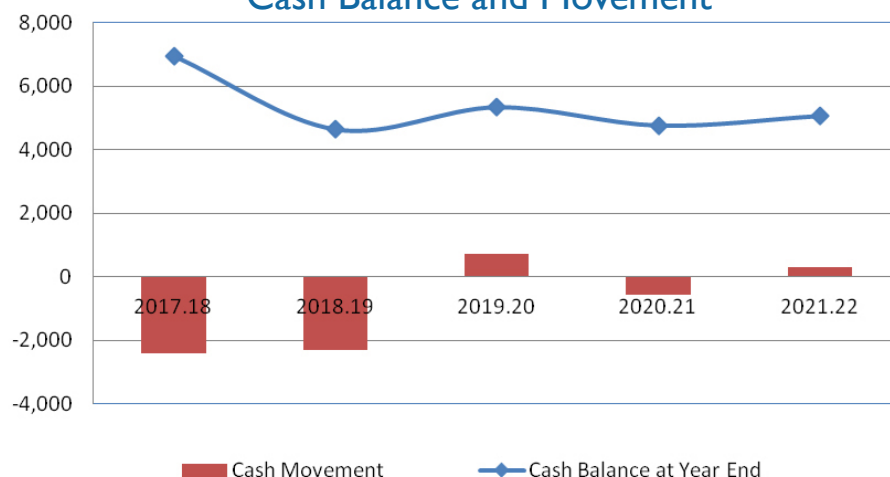
The graph below shows projected turnover and associated surplus over the coming five year period. This forecast is reviewed annually taking into account performance against plan and changes in the external environment.



### How we will spend our money 2017/18



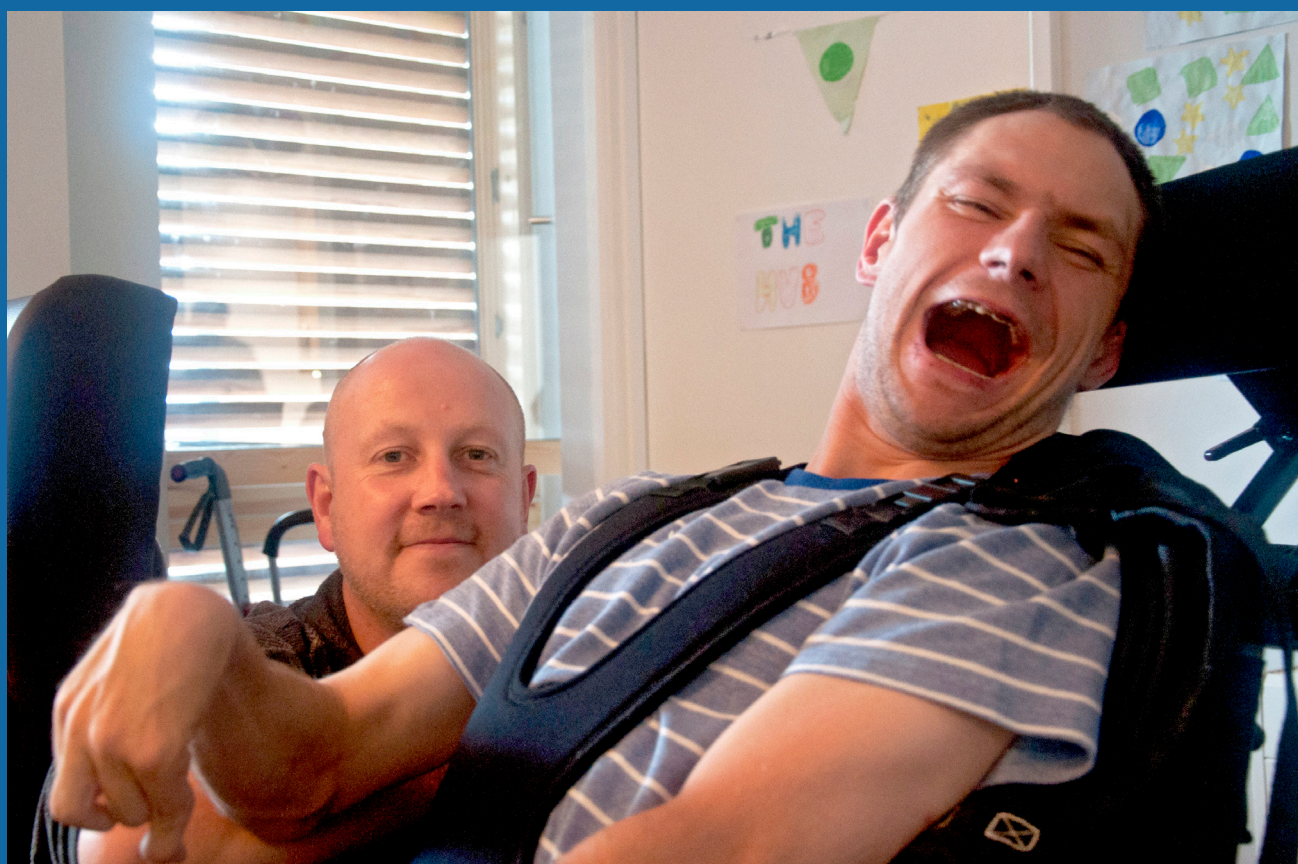
### Cash Balance and Movement



The graphs and charts demonstrate the financial viability of Advance through and beyond the period covered by the corporate strategy.

The investment in growth will increase income over the next few years, but will have less of an impact on the operating surplus, due to rent reductions and other challenges.

Sufficient cash is available to fund the investment in housing properties and even though cash balances drop during the period a sufficient balance is maintained to ensure that working capital requirements are covered throughout the period in question.



James receives Housing and Support services from Advance. He moved into an Advance extra-care scheme in Cornwall in May 2016. James shares his flat with best friend, Hannah. They have known each other since they were children, attending the same school, college and day centre. Both lived at home with their parents before deciding to flat-share.

Daniel, Advance Service Manager said: 'James has a brilliant sense of humour and finds it funny if he accidentally runs people over in his wheelchair!

On a recent trip he was able to indulge his love of socialising and meeting new people during an activity weekend with his Support Workers, Jo and Danielle.

He got really stuck in, taking part in all the activities. He enjoyed trying archery for the first time and got to try abseiling in a specially adapted chair.'

*Daniel*

