



Contents

The
BigLife
group

BIG LIFE MISSION	3
BIG LIFE WAY	4
BIG LIFE VALUES	5
TARGETS	6
ENVIRONMENT	8
The economy	
Inequality	
Government policy	
Technological change	
Climate change	
What this means for Big Life	
GROWTH AND MONEY	11
Why grow?	
Turnover	
Profitability	
Revenue mix	
Geography	
Partnerships	
Opportunities	
Challenges and risks	
Targets	
PEOPLE	22
Who works for us	
Staff satisfaction	
Training and development	
Apprenticeships	
Volunteers	
Service users	
GOVERNANCE	26
Corporate governance	
Clinical and service governance	
INFORMATION AND COMMUNICATION	29
Buildings	
Information systems and data	
Interacting with our customers	
Central systems and data protection	
Agile working	
INFLUENCE	31
Social accounts	
Stakeholder communication	

Big Life is in the business of changing lives, creating opportunities for people who have the least.

- We offer more than just first class education and childcare. We support the whole family from birth onwards. We offer volunteering, training and work opportunities; and programmes to develop health and wellbeing.
- We do more than just work with people to improve their physical or mental health. We help people look at everything affecting their wellbeing – from employment and housing to family and money issues.
- We don't just move people into work. We help people look at everything that will enable them to find and stay in a job – from family, relationships and money issues to health and skills.

We start where people are at, and support them to get to where they want to be.

Big Life has a coherent theory of change, which it uses to differentiate itself as an organisation. It works with communities to develop solutions which fit their needs in all areas of life. However the danger is that the group is perceived as a 'Jack of all trades and master of none'. One external partner suggested that while the organisation is perceived as professional, it is not seen as the expert in any one field.

The Big Life Mission and approach is very consistent with the current commissioning landscape for the delivery of public services. There has been a shift in the dialogue of commissioning over the last few years, with more commissioners looking for providers who offer a holistic service, helping people with the complexity of their lives, not just offering a single service.

The new Work and Health programme is an example of this - funded by both DWP and DoH, it aims to improve people's health and get them into employment. Despite the rhetoric, however, it appears that contract payments often prioritise single outcomes.

At the same time, as a result of austerity, public bodies are keen to develop new relationships with communities which are less about customer reliance and more about self help (the 'Wigan Deal' and 'Our Manchester'). This is an area where we have significant experience and is very coherent with our mission. The mission of the group reflects our commitment to working with the assets and needs of local communities and supporting people in all areas of their life.

At times our mission is more in tune with the thinking of commissioners and creates more opportunities for the group. While this is the case now, it is clear that the group needs to be able to succinctly promote its mission and examples of excellence.

In the last five years the group have developed descriptors about how our services operate. These are well received and have formed the basis for the Service Experience Audit. However, they are still relatively new and we cannot claim that they are reflected in all our work. We believe we could use them more effectively to promote a coherent message externally and to facilitate consistent service quality.

**BUSINESS
CHANGING
LIVES**

Back in early-nineties Manchester, people living in the inner-city communities of Hulme and Moss Side were fed up waiting for public services to support them, and started to develop their own solutions – needle exchange, family support, play schemes and self-help groups. This is where we started.

We recognised that people often faced a variety of difficulties, but they also had strengths and things to give. They were **people, not problems**. By working together to set up services, Big Life benefited from their strengths and the insight of their life experience.

At the time, services for poor people had the longest waiting lists, the worst quality buildings and the least care. We decided Big Life would be different; we would give people **first class** support, tailored to what they really wanted.

It wasn't easy, and many of the people we worked with had already been turned away from traditional services because they were too difficult, or had tried to change and not succeeded. But we believe that everyone has the capacity to change and we resolved to **never give up**, and keep offering opportunities for people to change their lives.

Over time, we grew, working in more communities, in more towns and cities, offering more services, but still with the same mission to change the world and turn it upside down. We've not stopped growing, and have never been afraid to **tread new ground** and respond to new and bigger challenges.

We know we can't do everything, and over the years we have benefitted from being able to **work in partnership** with other great organisations, including public services, private businesses and voluntary and community groups.

This is our story. It is how we work. It is The Big Life Way.



We work with **people not problems**. We see the potential in everyone and value life experience.

We believe all people deserve a **first class** service, led by them and tailored to their needs.



Everyone has the capacity to change, but we know it's not always easy. That's why we **never give up**.

We are not afraid to **tread new ground**. We learn and innovate to respond to new challenges.



We **work in partnership** to achieve more together than we can alone.

Big Life Values

The
BigLife
group

If the Big Life Way is how we want our services to operate, our values are how we want our staff to behave. We are proud of our staff commitment to our mission (91%) and recognition that we work according to our values (84%). Our new workforce plan will ensure that we reinforce our values and develop our staff.



COURAGEOUS



VALUING
DIFFERENCE



HONEST



CREATIVE



INSPIRING



THOUGHTFUL

13,000,000 people in the UK live in poverty...

Let's create opportunities

We will start where people are at, and support them to get to where they want to be. By 2020...



We will work with more than 100,000 people every year across our services



We will employ more people with life experience of addiction and mental health issues



We will provide more opportunities for volunteers and people on work placements

53% of wealth in the UK belongs to 10% of the population

Let's do good business

By 2020, we will be more efficient, doubling our turnover, and expanding our services, through...



Increasing our turnover to at least £30m across Big Life



Having a strong balance sheet, increasing our current net assets to £2.5m across the group



A mix of income streams; 76% through contracts, 16% through trade and the rest through grants

People living in poverty die younger...

Let's improve what we do

We will have a workforce committed to our mission and values to help us be the best we can be, with...



96% of staff in The Big Life group committed to achieving our mission



Robust data management and IT systems across the group



Services that embrace technology without leaving people behind

Hate crime is on the rise...

Let's be influential

We will champion people who have the least but need the best, by...



Fighting for the issues that really matter to the people that we work with



Building a network of local and national stakeholders who champion our mission



Creating social accounts that demonstrate our impact on the world around us

The economy

The economy has recovered from the 2008 recession caused by the collapse in the banking sector. This year it is forecast to grow faster than any other G7 economy with the OBR forecasting GDP growth of 2.2% in 2017 and 2.1% in 2018. Employment is forecast to continue to grow and CPI is forecast to gradually return to 2% in 2018. The employment rate of working age adults is at a record high, and median income and GDP per head of the population has recovered to pre-recession levels.

In 2010, the UK had the largest budget deficit in the G20 (11.4% of GDP), but it has reduced by almost two thirds (to 3.8% of GDP) in 2015/16.

However the outlook for the global economy has worsened and there are indications of slower growth. In advanced economies there are growing concerns about high debt, productivity and inflationary pressures. The uncertainties of Brexit bring added risks to the UK economy.

Inequality

However this recovery is not shared evenly across the population, with the lowest fifth of households still earning less than they earned ten years ago.

Despite successive governments committing to creating a 'fairer' society, inequality and disadvantage continues. There are now 13 million people living in poverty in the UK, which is 21% of the population. But there are regional variations. In the North West and North East 22% of the population are living in poverty. London has the highest percentage of the population living in poverty at 27%, which reflects the high cost of housing. The South East and Scotland have the lowest levels at 18%. People from BME communities are more than twice as likely to live in poverty compared to the rest of the population.

There are now more people in working households in poverty than ten years ago (7.4m people). The number of working adults without children in poverty has increased with 28% of 18 to 24 year olds in 2014/15 living in poverty. Progress to address pensioner and child poverty through the introduction of tax credits, has stalled, with no progress in the last five years. In 2014/15, 29% of children and 14% of pensioners lived in poverty.

Poverty rates for some children are higher than others. 45% of children of foreign born parents live in poverty, as are 56% of children living in private rented accommodation and 51% of children in the social housing sector.

There are now 4.6m people living in poverty in social rented housing, 4.5m in owner occupied properties and 4.5m in the private rented sector. At the same time housing tenure has changed, with owner occupation reducing from 71% of households in 2004 to just 64% of households in 2014/15. The social rented sector saw a decline of 1%. As a result the private rented sector has nearly doubled to 19% of all households by 2014/15 (from just 11% in 2004). The private rental sector has absorbed both higher earners unable to pay higher housing prices, and lower income households unable to access social housing due to lack of supply.

Households headed by a person from an ethnic minority are more likely to live in substandard housing (27.9% of households headed by a Black person; 26.3% of households headed by a Pakistani/Bangladeshi person; 20.5% of households headed by a white person).

There are 4.7m recipients of Housing Benefit in the UK – which is 49% of renting households. In the North West it is 53% of renting households and in the North East, 57%. While the number of people claiming out of work benefit has reduced across the country, the North East and North West have some of the highest numbers of claimants at 13% and 11% respectively.

Income deprivation and living in a deprived neighbourhood reduces life expectancy and years lived healthily. In 2012/14 healthy life expectancy for males born in England was 63.4 years, compared to 61.1

years for males born in the North West, and 59.7 for males born in the North East. Similarly, women born in England were expected to live 64 healthy years, compared to women born in the North West who expect to have 61.8 healthy years and 56.7 healthy years for women born in the North East. These regional statistics also hide local variations, with the Manchester male healthy life expectancy being 56.1 years and the Manchester female healthy life expectancy being 54.4 years. Whilst across the country health inequalities between richer and poorer areas have been closing, there are still significant inequalities.

Living in poverty directly impacts on a child's development and life chances. Educational attainment at Key Stage 2, in reading, writing and maths interacts with gender and coming from a low income family. 34% of children on Free School Meals under attain compared to 17% of children not on Free School meals. Boys achieve less than girls from both groups. By the age of 16, this gap widens still further with 63% of pupils on FSM not achieve 5 A-C GCSE's compared to 35% of all other pupils.

Just 6% of Black school leavers attended a Russell Group University, compared to 12% of mixed or Asian school leavers and 11% of White school leavers.

Government policy

Since 2010, Government Policy has focused on reducing the national deficit through austerity. The current government aims to continue to 'bear down on public debt' and return the economy to surplus by 2019/20.

Between 2010/11 and 2015/16 Government continued to reduce public expenditure with a cut of 10.2% to departmental spending and it plans a further 2.9% to be cut from public expenditure by 2020. This hides variations in reductions between departments. Whilst school and NHS budgets were maintained, Local Government was one of the hardest areas cut with a reduction of 30% over the period 2010/11 to 2015/16.

Reductions in public service funding has been supplemented by the introduction of, or increased charges for services, higher thresholds for access and more emphasis on the role of civic society (expressed by Cameron as the 'Big Society') and personal responsibility. In local authorities this has expressed itself as new relationships with their local communities, such as the 'Wigan Deal' and 'Our Manchester'. Whilst there have been some examples of the public sector outsourcing services to the independent sector to reduce costs, this is by no means a significant trend.

Over the same period, however, non-departmental spending increased by 3.2%. This reflects rising costs of welfare and interest payments on public debt. Alongside controlling departmental spending successive governments have aimed to reduce the benefit bill. Since 2010/11 there has been £17bn of benefit cuts, but the overall social security bill to government has remained relatively static at 2010/11 levels. This is due to a number of factors including an ageing population, lower than expected growth in household earnings and growing housing benefit costs. As a result further £12bn of cuts in welfare are planned by 2017/18.

Benefit changes over the last fifteen years have resulted in benefits becoming less targeted at people at the bottom of income distribution than at any time since the 1980's. Changes, such as the Benefit Cap, due to take effect in 2018 will adversely affect single people under the age of 35.

Changes in benefit payments and departmental budgets has impacted on the supply of housing and support. The number of people rough sleeping has risen year on year since 2010, from 1,768 to 3,569 in 2015, doubling in just five years. The number of households accepted by Local Authorities as Homeless has also risen since 2009 when it was 210,000 and reached an all-time high in 2013/14 of 280,000. In 2015/16, it fell to 270,000 households.

Public sector reform has recognised that people lives are complex and that delivery of services through silos does not provide the most effective response. There has been some move towards joint commissioning (for instance health and employment), but these contracts tend to have a hierarchy of outcomes depending on who the commissioner is. The drive for efficiency is also leading to reorganisations of public service delivery into Local Care Organisations – partnerships between a range of public sector bodies or one provider 'priming' delivery and sub contracting to other providers.

As Local Authorities have been forced to raise thresholds for social care, they are increasingly looking to local community assets to fill the gap. Local Authorities such as Wigan, have led the way in developing a new compact with their residents – investing in community hubs to support voluntary and community activity, enabling them to reduce investment in traditional service delivery.

Net migration to the UK has risen steadily since 1980's to an all-time high of 320,000 in 2015. Non EU migration has fallen since 2005, whereas EU migration has steadily risen. This is a reflection of the relative strength of the UK economy compared to other EU countries. Whilst there is no evidence to show this has a negative impact on the economy or public finances (EU migrants who arrived in the UK in the last four years have paid £2.54bn more in income tax and national insurance than they received in tax credits or child benefit), successive governments have repeatedly aimed to reduce net migration, and floated policies such as charging 'health tourists' for use of the NHS; prioritising indigenous children for school places over migrant children; and further restrictions on access to benefits by new arrivals.

Further government policies that may impact on Big Life:

- Rebalancing school budgets
- Nursery Education Funding
- Brexit and attitude to EU migration
- Investment in mental health
- Housing Benefit changes for enhanced housing management and supported housing
- Apprenticeship levy and skills funding.

Technological change

The past decade has seen the rapid development and adoption of technologies that change the way we live. We need to prepare young people for jobs that don't exist yet, using technologies that haven't yet been invented. The advancement of Artificial Intelligence will impact on the jobs market and on the delivery of service and manufacturing industries.

Consumers are driving this change, demanding more control and tailored services. The public sector, which has traditionally been a slow adopter of technology, is now looking to drive efficiency through it.

How we communicate and get information has changed dramatically. In 2002, the UK's 10 most popular newspapers sold 12.5m copies each day. In 2016, that figure is just 8.5m. Similarly in 2002, 162,421 people picked up the Manchester Evening News each day and in 2016, only 51,800 people did. In 2016, 59 per cent of the UK use social media actively, on more than 200 different platforms. As a result, people who are digitally excluded will be increasingly marginalised economically and socially.

What does this mean for Big Life?

Whilst economic growth is not leading to greater equality, and public sector cuts are forecast to continue until 2020, we anticipate that there will be even greater need for organisations like the Big Life group to create opportunities for people who have the least. This is why we are setting a target to double the number of people we work with over the next three years.

There are real opportunities afforded by regional devolution and the Northern Powerhouse, to focus on addressing the needs of people living in the north of England. We will build on the strategic relationships we have developed in the North West and North East to expand what we offer.

With more than 20 years record of working with people to develop innovative solutions to social problems, we will work with partners to share our asset based approach to creating sustained social change.

Our unique approach and range of services, are needed now more than ever. When public funding is constrained we need to find new cost effective ways to expand services and make the most of all the resources we have. We need to utilise technology effectively to develop our offer, whilst at the same time, protect people who are less able to access digital solutions.

The diversity of our workforce, volunteers and service users is an opportunity to showcase and value difference. We will show how people from all communities can contribute to society, given the opportunity.

We believe we have a duty to combat stereotypes and prejudice against the people we work with. Attitudes to race and immigration are often not based on fact. The Leveson Inquiry indicated that the press reporting on immigrants and ethnic minorities was often unbalanced and sensational. Hate crime has seen a continued increase in England and Wales since 2011/12 to 2015/16, from 35,944 recorded incidents to 49,419 incidents, with 41% more race crime incidents in July 16 compared to July 15.

Why grow?

In the last two business plans we have set ourselves a target to grow and we will continue this commitment to 2020. We believe there were three main reasons for growth:

To provide more services to people who need them

We believe that we offer good quality services to people who often receive the worst. Our model of engaging local people and volunteers, building self-help and resilience and helping people with all areas of their lives is one that few other organisations offer. In the last five years the number of people we have worked with has quadrupled (from 11,450 in 2010/11 to XXXXXXX in 2016/7 add figure when we have 2016/17), whilst our turnover has doubled. This means that we are reaching more people for less money, year on year.

We have shown that we are able to reach parts of the community that public services struggle to engage. The Big Issue continues to offer a vital way of earning an income for people who have few choices. Our schools offer quality education in areas with high levels of need, supporting whole families into better health and employment. The economic landscape remains bleak, with increased numbers of children living in poverty, the future impact of benefit cuts and further public sector austerity, affecting the people we work with more than others.

We believe there is more to do and that we should be growing to meet this need. In planning our future growth however, we have options about what we want to grow and how.

Our funding model requires it

The margins in public sector contracts have always been tight, and with ongoing austerity, they continue to be under pressure. Commissioners want more outcomes for less funding. The larger we are the more efficient we can be in the delivery of group services and focus funding on the front line.

Most public sector contracts are commissioned for between three and five years; and when retendered, commissioners are often looking for innovation. In 2016/17 £6m of current contracts were retendered. By the very nature of our business model, we need to continually look for new business and new ways of doing things. As the value of public sector contracts has also fallen due to austerity, this has become even more imperative.

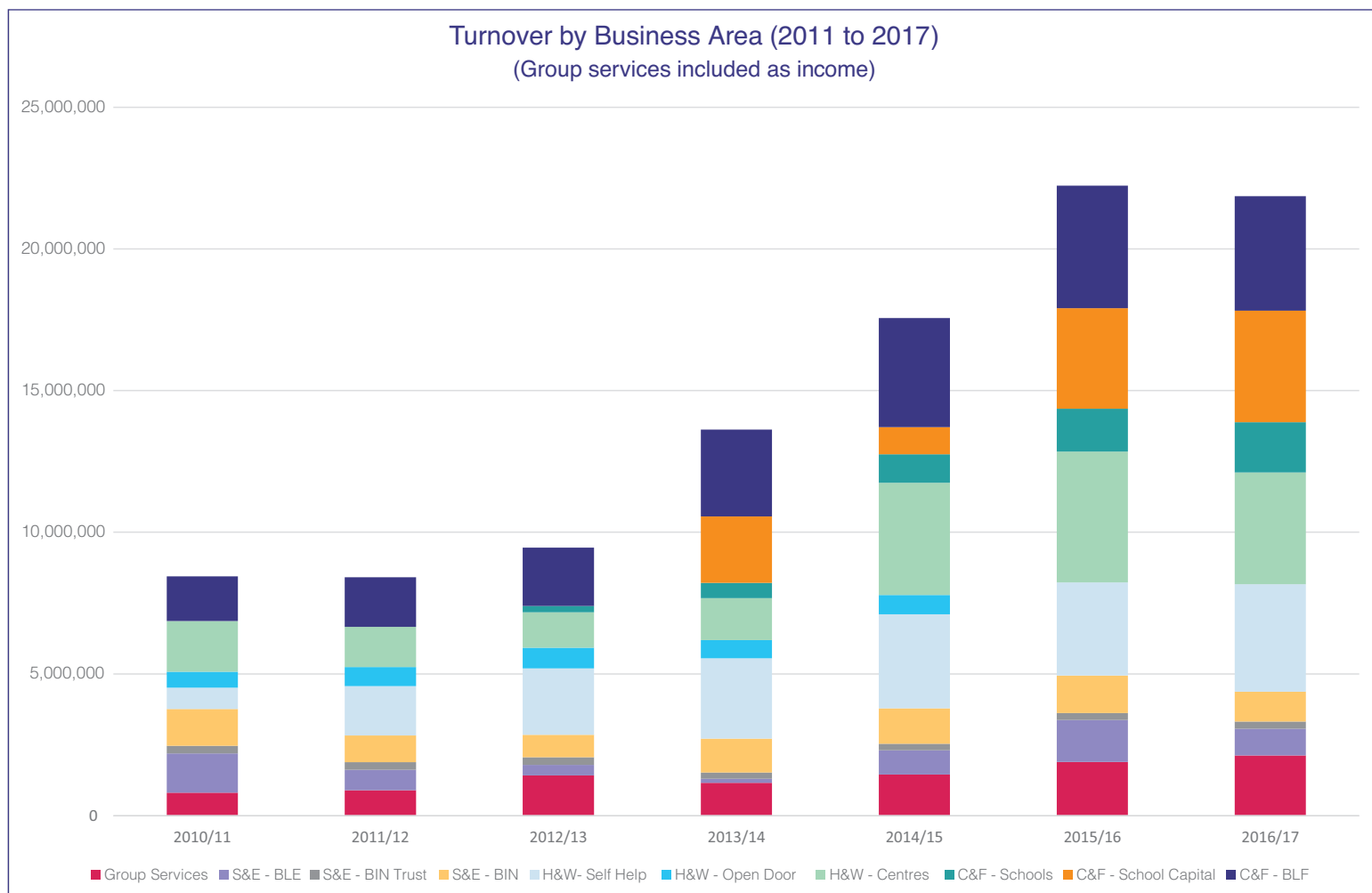
To provide stability in communities and to our workforce

The current commissioning model of the public sector instils an inherent instability into service provision and our ability to develop a strong stable workforce. In areas where we have multiple contracts, there are some opportunities to retain staff and this has contributed to us developing a multi-disciplinary skill base which enables us to offer an effective life coaching model. However, the opportunities to retain staff and develop them are limited by our size.

Turnover

In the last five years the group turnover has grown from £8.2m in 2011/12 to £15.4m in 2016/17. All areas (with the exception of Big Issue North) have contributed to this growth, but the main contributors are the schools, nurseries, public health and employability contacts.

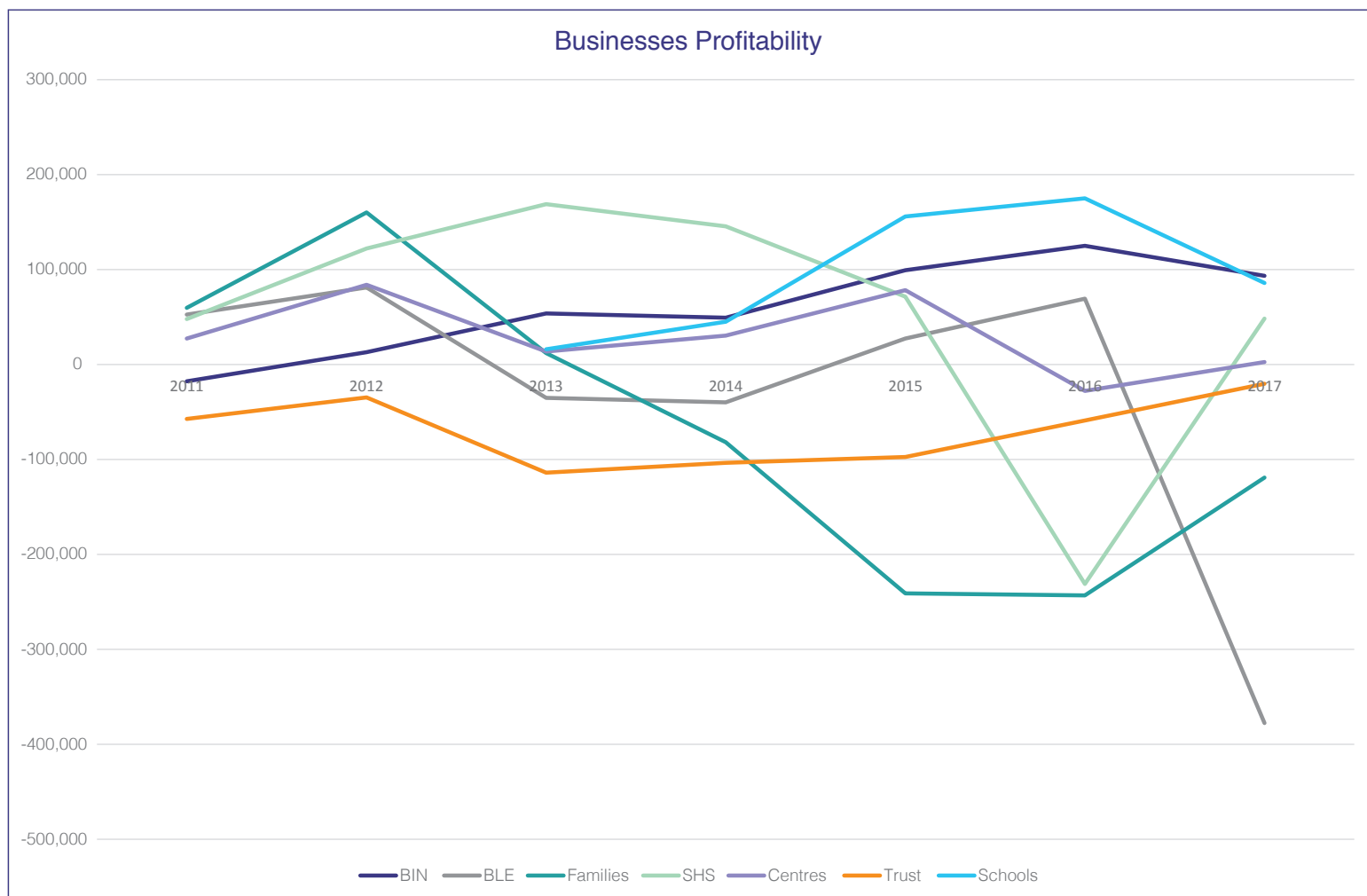
Growth has been consistent year on year until the last year, when it fell for the first time. This was a result of decisions to exit two nurseries in Manchester and the Open Door Primary Care practice in Grimsby; and the ending of the Harvey Housing contract in Liverpool. There was also a small reduction in the employability contract values.



Profitability

In the last Business Plan we set a target of a 5% profit every year. The chart below shows the group profitability and then profitability by business. It is important to note that individual business profitability will be affected by the more profitable areas investing more in infrastructure and business development, and the school building income is shown as grant, giving a more positive picture of performance.

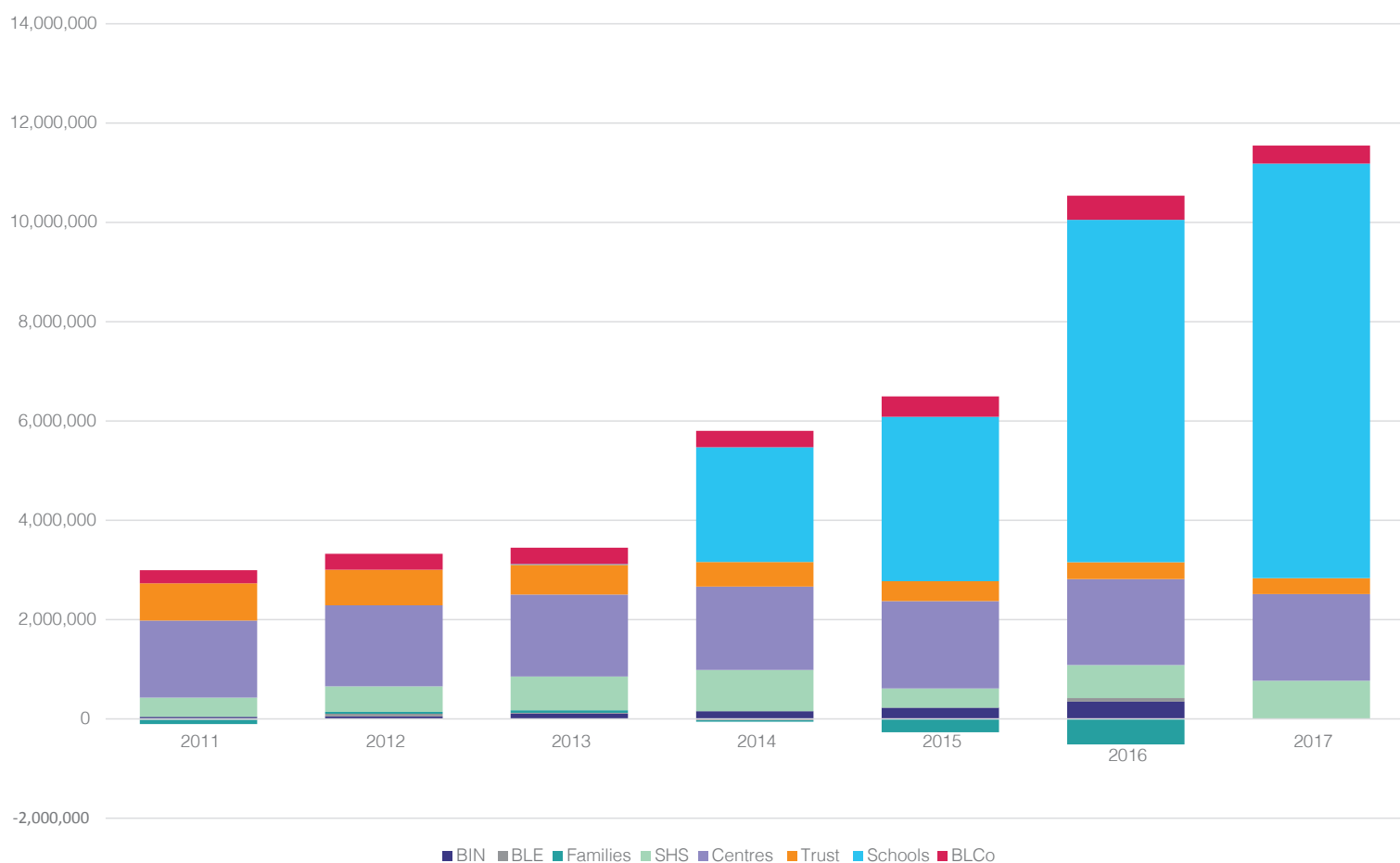
It is clear whichever way we look at the profitability that we have never made the 5% profit target across the group. In the last five years we have invested significantly in a number of infrastructure projects including Big Life People database, a new IT provider, upgrade SAGE financial system and processes, and HR database. The value of these investments is £317,000. This has led to some quality improvements, but efficiencies are yet to be achieved.



The chart overleaf shows the growth in the group balance sheets over the last five years. This has been strengthened by the addition of the two new school buildings.

If we took these out we can see that whilst the group turnover has more than doubled, the group assets have stayed the same, and most of the assets are in the charities. Strengthening our balance sheet in the Big Life Company by improving operational profitability needs to be a key priority in the next three years.

Balance Sheets across the Companies



Revenue mix

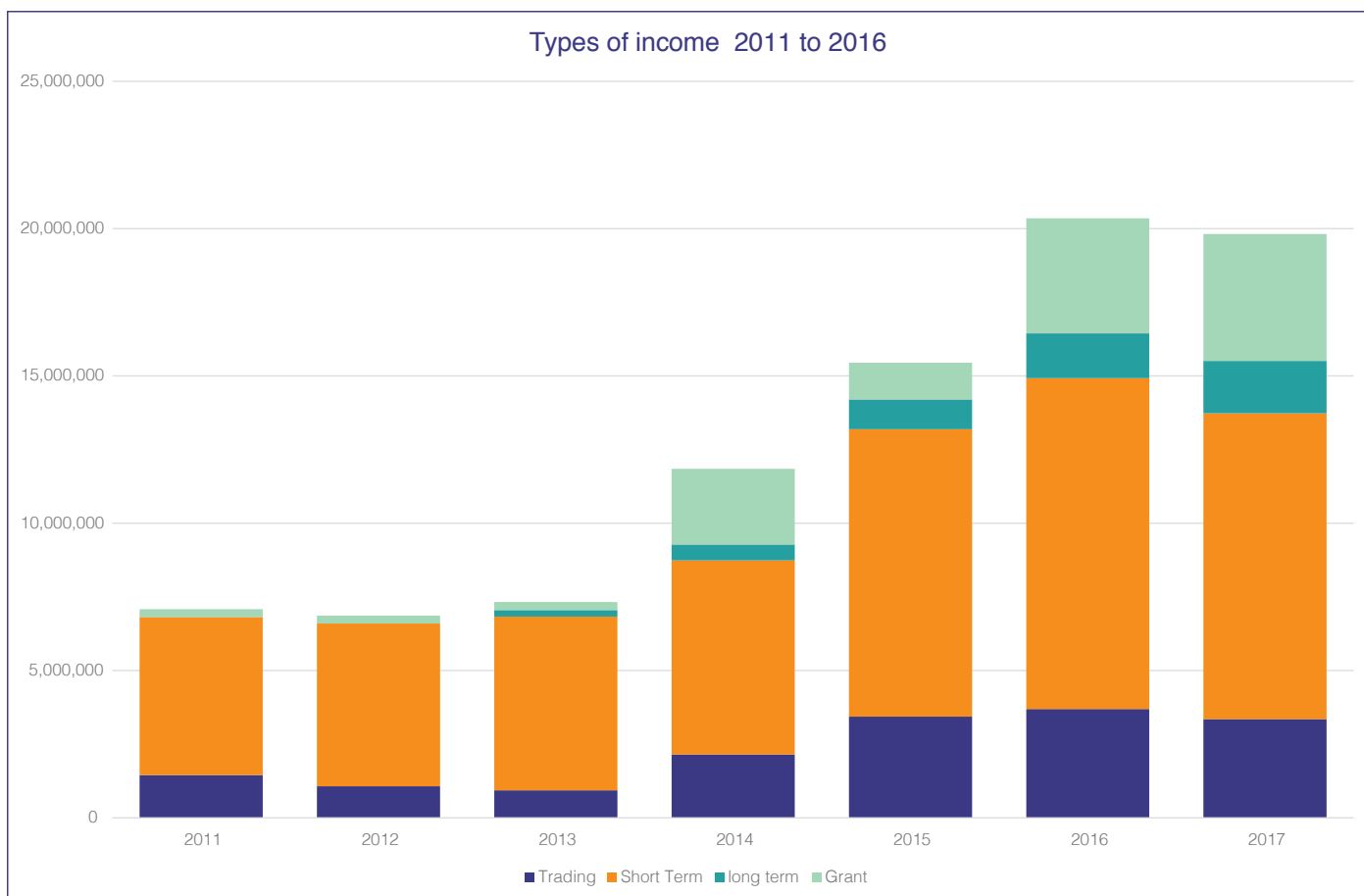
The revenue mix over the last five years has changed considerably. Trading income has steadily grown and we have had long term contract income for the first time from the schools. The grant income has grown, but this is largely for the school buildings, rather than for operational costs. We are largely reliant on short term contract income as a proportion of our overall trading activity.

Ownership of buildings, trading income streams and long term public sector contracts can give us a foundation and stability in a community which enables us to develop new services and opportunities. They can also enable us to build a more stable workforce to develop leadership, culture and skills.

Short term public sector contracts incur cost to bid and implement, but many of the services we wish to deliver are only funded through this route.

We receive little grant funding (except for the schools buildings) which reflects our negative experience of trying to raise funds from Trusts and the inflexibility of the Big Lottery when we first formed the group in 2002, and when we exited the Trafford Nursery in 2006. We do receive a number of small grants for community activities such as health improvement activities through our community centres, but this is not co-ordinated in a systematic way. We consistently raise £70k every year from public donations to the Big Issue Trust at a cost of circa £35k, but have felt that our clients are not seen as sympathetic subjects for more public donations.

In the next three years an increase in long term contract and trading income streams may be desirable, but we will aim to ensure that this does not lead to any one business area dominating the group.



We should challenge our attitude to fundraising as we may have missed opportunities to identify grant funding for research, innovation or piloting services. We have inconsistent approaches to fundraising at a grass roots level, both of which could be improved in the next three years.

Since we partnered with Martin Ainscough on the Giving a Lift project, we have not pursued further CSR projects. We have benefited from partnerships with Laing o Rourke, Salford and Manchester Universities to help develop strategies and input into business planning. We should consider identifying new corporate partners as a way of bringing in new funding and expertise.

Geography

In the last business plan we aimed to double our turnover and, in order to offer a full range of holistic services to the people we worked with, we aimed to grow clusters of services in geographies where we already had a foothold in the north of England. We developed our central tendering team in group services and established effective processes for monitoring and assessing opportunities, and submitting quality bids. This strategy was successful in exceeding our target of doubling our turnover. However, whilst we initially expanded our geographic reach, we lost some contracts (Knowsley, St Helens, and Liverpool) or found we were unable to sustain some (Open Door in Grimsby).

Our assumption that we would be able to build on an individual service in one locality by tendering for other services proved false. For example, we tendered in Leeds for employment and health and wellbeing contracts and despite our good track record in these fields, and the fact that we already deliver Big Issue North in Leeds, we were not successful in either bid. In contrast, in Stockton we did increase the number of services we delivered, but considerable leadership time was invested to develop strategic relationships, over and above the operational requirements.

As a result Big Life is mainly clustered in Greater Manchester and Stockton, with individual services in Liverpool, Sheffield, Leeds and East Cheshire. Learning from this experience we propose to identify geographies outside Greater Manchester where we can invest in developing strategic partnerships and presence, in order to meet our growth target over the next three years.

The devolution agenda may offer opportunities to develop our strategic partnerships in Greater Manchester and other devolution areas – in particular the North East, Sheffield and the Liverpool City Region.

Partnerships

In order to deliver a whole person approach, we aim to work in partnership with other agencies to deliver seamless services. Our 0-19 model, for instance, will be much more effective if we can develop it to work across organisations, not just within Big Life nurseries and schools. Partnerships also offer the opportunity for Big Life to support smaller social enterprises and community organisations in local areas.

Over the last five years Big Life has worked in partnership with an NHS Trust to tender for and deliver services. This has proved a positive relationship and is a model of how Big Life could work with other public bodies in the future to compete for new contracts, in an environment which is becoming increasingly difficult. In particular NHS bodies can offer expensive clinical leadership and opportunities for staff training.

Big Life has a track record as a prime contractor and as a sub-contractor. The size, nature and geography of the contract will determine the best approach to each opportunity.

The opportunity afforded by a merger or acquisition to build our balance sheet, enhance our blend of income streams and geographical reach is one that we will actively explore. In the past organisations have only approached us when they were in difficulty and needed a stronger organisation to support them. We will develop a strategy for actively identifying opportunities for working with like-minded organisations that complement the strategy of the group.

Opportunities

Division	Area	Opportunities
Skills and Employment	Employment skills and wellbeing support	Contracts for delivery of skills and wellbeing
	Big Issue North	New products for vendors to sell
	BIN Trust	Fundraising opportunities
	New	Further education and training
Health and Wellbeing	Public Health	Drug and alcohol recovery
	Public Health	Community, coaching and lifestyles contracts
	Mental Health	IAPT and wrap around self-help services
	Mental health	Sanctuary and peer led services
	Mental health	Child health and wellbeing services
Children and Families	Schools	New Free Schools and transfers to MAT
	Nurseries	Integrated nursery and school offer
	Children Centres	Family hub model and new contracts for universal offer
	Child wellbeing	0-18 wellbeing model
Cross Group	Self Help tools	Big Life publications Big Life modular personal development programme Self Help groups and training

Challenges and Risks

Political and policy	Continued public sector austerity leading to commissioners divesting or wanting more for less. (MCC budget cut from £1.06bn in 2010 to £0.78bn in 2014; DWP budget cut 40% since 2010/11).
	Devolution leading to more centralisation and protection of public bodies (Manchester Single Provider) at the expense of social enterprise sector.
	Government and policy changes - Schools, Nursery funding
	Brexit - loss of BIN Roma vendors; changes in procurement
	Growth of division and discrimination leading to restrictions in access to public services, fewer opportunities for the people we work with and less public support for our work
Economic	Competition and austerity forcing a race to the bottom in terms of wages and staff terms and conditions, making recruitment, delivery and retention difficult
Competition	There are third sector providers in every field we work in
	Big Life asset based approach; holistic; coaching and MI interventions are becoming mainstream
	For profit competitors may be more cost effective and have better infrastructure
Internal capacity and capability	Fast growth has led to some poor performance on delivery and reputation damage
	Big Life is not the expert in any one area - its revenue stream in any one area is small compared to other competitors
	Small profit margins and lack of balance sheet strength to invest in infrastructure
	Geographic spread leads to challenges to management and infrastructure, including IT
	Reliance on short term contracts
	Delivering an integrated offer when we only deliver one service in an area

Targets

Big Life group income in 2016/17 reached £19.8m (£15.8m turnover). Our target for the next three years is to increase turnover to £30m.

In order to achieve this we will double the turnover in Children and Families division, increase turnover in Health and Wellbeing division by 50% and sustain turnover in Skills and Employment division.

Summary by Division (£'000) - assuming 100% of the existing contracts and tenders, and weighted average of new opportunities (C: 10%, b: 50%, A: 80%)

	2017-18	2018-19	2019-20
Big Life Company	518	518	518
Children and Families	5,359	7,009	10,209
Health and Wellbeing	9,155	12,651	14,252
Skills and Employment	2,082	2,157	1,851
Total	17,114	22,335	26,830

We are also aiming to increase revenue from trading by £2m to £5m and grant revenue to increase by £2m. We have not allocated this target across the divisions since we expect that this revenue is most likely to derive from innovations in service design and delivery that we are working on across the group.

Our longer term strategic objective is to reduce our reliance on short-term contracts by developing trading income. By achieving the targets for increase in trading and grant revenue we will reduce our reliance of contract revenue from 83% of total revenues to 76% of total revenues over the business planning period.

Turnover target by type of revenue stream (£'000)

	Contracts	Trading	Grants
Turnover target 2017/8 (£)	14,158	2,619	337
Turnover target 2017/8 (%)	83%	15%	2%
Turnover target 2019/20 (£)	23,440	5,051	2,339
Turnover target 2019/20 (%)	76%	16%	8%

The contract revenue above are based on existing contracts, including those that are available for retender during the business plan period, plus a percentage of known opportunities based on our experience of our success rate for different opportunities.

These are stretch targets based on our current understanding of each of the markets within which we operate.

Balance Sheet Strength

The summary of key balance sheet data (below) shows that the balance sheets for each of the charities are strong with significant net assets compared to annual turnover. However, Big Life Company Limited has modest net assets. Big Life Company balance sheet strength is important in order to

- Provide cash flow flexibility for periods of change such as contract mobilisation/exit.
- Provide a contingency reserve to enable us to deal with unforeseen circumstances and take advantage of opportunities for innovation and growth
- Meet the requirements of commissioners for larger contracts
- Attract investment to enable us to fund growth

Our aim is to increase net assets to £600k over the period 2017-2020. This will provide us with core reserves of £200k and ensure that our cash flow is sufficiently flexible through contract mobilisations and exits.

This will also enable us to fund up to £200k of business development projects, including the cost of first stage investigations of potential mergers and acquisitions, whilst maintaining core reserves of £200k and maintaining flexible cash flow.

Balance sheet summary by legal entity (uses Feb balance sheet forecasts for year end 2017)

	Fixed assets	Current net assets	Net assets
Big Life Company	2,206,763	403,881	212,165
Big Life Schools	7,692,571	328,480	8,020,950
Self Help Services	-	966,829	966,829
Big Life Centres	1,250,042	469,400	1,719,443
Big Issue in the North Trust	31,695	272,576	296,723

In order to achieve this we would need to generate profits after interest and tax of £388k over the 3 year period. We have set the following targets.

Forecast annual turnover

	Turnover inc grants £'000	Profit Target £'000
2017/18	17,147	90
2018/19	24,868	130
2019/20	30,863	168

Buildings

Of the five entities in the group only Big Life Schools, Big Life Centres and the Big Life Company have capital assets. Big Life Schools owns Longsight Community Primary and Unity Community Primary; Big Life Centres owns the Zion Centre; and The Big Life Company owns Stretford Road and Longsight Children's Centre.

The capital assets of Big Life Schools (Longsight Community Primary and Unity Community Primary) are restricted to the Trust and would return to the Secretary of State if the schools ceased to operate.

The Zion Centre is wholly owned by Big Life Centres and doesn't have any restrictions or outstanding charges against it. It is subject to a head lease with Places for People who manage the sinking fund for major structural repairs. The capital assets of Big Life Centres are restricted to the charity and would transfer to another charitable organisation if it ceased to exist.

Big Life Company own the Longsight Children's Centre building, and leases the land from Big Life Schools for 15 years. In light of plans to integrate the nurseries and schools, we intend to explore Big Life Schools purchasing the Children's Centre from the Big Life Company and leasing it back. This would provide greater efficiencies in managing the building and better integration of services.

Over the last five years we have developed comprehensive cyclical maintenance plans for each building we own and created sinking funds to finance building improvements. All of the other services operate from premises that are leased or licensed, with the exception of the Kath Locke Centre, whose ownership is still undetermined.

Fixed Assets

The space used for group services at 463 Stretford Road HQ and Kath Locke are not ideal as HQ space, and operational teams in other parts of the group are located in space that is on short term lease. We need to find a new HQ and move the operational teams into existing space at 463 Stretford Road and Kath Locke Centre.

We have therefore decided to evaluate options to purchase a new HQ. This will mean that we can build equity in the fixed asset over time and this will improve the balance sheet strength and can be used as security for investors.

We are currently exploring three options:

- Extension to Kath Locke Centre. This requires clarification of the lease and this will require the cooperation of several agencies.
- Asset transfer: MCC are in discussion about the transfer of a building on Stockport Road. The building would require substantial refurbishment and so we will need to negotiate lease terms that will allow us to secure a loan against the site.
- Commercial purchase: To acquire premises at full value will require a mortgage and we are considering a joint purchase with Self Help Services. It will be important to ensure that the basis of the equity split, including any future increase in value, is clear and fair to both Big Life Company and Self Help services. We have not identified a potential site at this stage but continue to look at opportunities as they arise.

The space required is likely to be in the region of 800 m². The cost of commercial properties of a suitable quality range from £950 - £1400 per m². This would result in an asset value in the region of £750,000 - £1,100,000.

The key risk in owning the HQ would be the risk of increasing interest rates or a decline in property values. The long term advantages include flexibility in changing the use of the space to meet changing needs and gradually building equity in an asset that could be used as security for future investment.

Investment

Historically the group's growth has been funded internally, but during the last five years we have secured social investment for the delivery of a public sector contract requiring cash flow, and investment from our bankers for expansion of our nursery business. The social investment required a lot of work to secure and was withdrawn when the contract was suddenly ended by the Government. The bank facilities have been easier to secure and manage but are limited.

We have continued to explore social investment opportunities as a means to fund future growth. However, we have not pursued any of these to conclusion for a number of reasons:

- Lack of clarity about what we wanted to fund and how we would repay investment
- Timescales required a quicker solution for funding than social investment provided
- Inability to provide financial data in the timescale or formats required
- Cost of social investment is high compared to mainstream banks
- Profitability of contracts/opportunities could not fund repayment of investment

In the next three years, in addition to the investment in fixed assets identified above, we will require investment in working capital to support growth in revenue and for development of innovations such as the Big Life App. Increasingly customers and commissioners are looking for easier ways for people to access services and we need to expand the channels of support we can offer – web chats, online tools etc.

The growth in Children and Families Division is expected to be primarily due to the expansion of Big Life Schools although £0.75 million is due to expansion of contract revenue for children and family services. Since our costs incurred for these contracts are primarily staff costs, the working capital requirement for Big Life Company could be of the order of £0.15 million. Schools expansion is not expected to require significant additional working capital, however, the school nursery development at Unity Primary School is likely to require investment.

Growth in the Health and Wellbeing Division is expected to be primarily public health and mental health contracts with the NHS and local authorities as the commissioners. Again, the costs incurred are primarily staff costs and so the working capital requirement could be as high as £0.8 million. Most of this increase in working capital will be required by Big Life Centres or Self Help Services as the operational entities responsible for delivering the services, but there will be a modest increase in working capital requirements for Big Life Company. Both Big Life Centres and Self Help Services have strong balance sheets with positive cash balances and so we do not anticipate that the need for investment will be a barrier to growth.

We will be looking at opportunities to develop a training academy to deliver training funded by the Apprentice Levy for our staff and external agencies. This may require investment to partner or develop our infrastructure.

Investment required for innovation is very difficult to estimate at this stage and growth opportunities could exceed our current forecasts. Our aim, therefore, is to build a relationship with an investment partner who will understand our organisation and so be able to respond on the tight timescales of most tender opportunities.

Investment in our new HQ is likely to be challenging for most investors but there are investors, such as the Northern Powerhouse Fund, which will lend without security albeit at a higher rate of interest than other lenders. This could be a worthwhile for an outstanding opportunity such as an asset transfer.

Who works for us

	2012-13	2013-14	2014-15	2015-16	2016-17
No of staff	304	377	514	517	490
Turnover (not including TUPE)	18%	12%	18%	16%	19.5%
Days lost to sickness per staff member	4.7	4.9	5.7	6.7	7.9
BME	29%	30%	26%	26%	30%
Staff living within two miles of workplace	30%	28%	34%	37%	31%

The number of staff employed by the group has grown in response to securing new business over the last five years.

The turnover rate has remained relatively high compared to national benchmarks of 15%. This level of turnover presents challenges and leads to a need for greater investment in training, leadership development and culture. However, turnover rates vary in different service areas and the senior management level has remained relatively stable during this period. We can conclude that for the most part the turnover rate reflects changes in contracts rather than staff dissatisfaction.

Since 2012 (when contract changes meant a lot of staff were in consultation to change or end their employment), staff feelings of job security has gradually increased from 47% to 69% in 2015/16. However, this might reflect the cycle of commissioning and as contracts are coming to an end again in 2017, we might expect to see a dip.

The staff sickness rate has risen year on year, but compared to national benchmarks the sickness rate is now more consistent with the national average for our sector (7 days), and the increase may simply reflect better recording.

Our commitment to local employment and creating entry level jobs has meant that we have been able to maintain a high percentage of staff from BME communities and people living close to their workplace. However further investigation needs to be done on the distribution of BME staff across managerial and leadership roles to ensure that we are creating development opportunities for people joining the group.

Over the last five years we have asked staff to report on personal experience of mental distress. This is to reflect our commitment to employing people with 'life experience'. We believe this adds value to the services we deliver and ensures we offer employment as an opportunity to people with barriers. In future years we will also monitor our employment of people with life experience of addiction. We will research the impact that employment of people with life experience of mental health problems and addiction, has on both staff members and service delivery.

The percentage of staff with a disability is low at 7.8% compared to public service average of 9.2%. There are currently 21.6% of working age people who are disabled and not in work. We need to develop strategies to attract more people with disabilities and provide a positive working environment for them.

Staff satisfaction

Staff express very high levels of commitment to the mission of the group (93%) and would recommend the group as an employer (94%). This is despite low percentages of staff who feel they are paid a fair salary (54%) or who feel secure about their job (69%). Feedback through the Business Planning process also suggested that the group should try and improve wage levels.

In 2015 the group reviewed all salaries to ensure we were paying the Campaign Living Wage. This was implemented in all areas except the nurseries, whose financial performance did not make this possible. It remains an ambition to achieve this. All staff are paid at or above the legal National Living Wage.

Over the last five years we have developed the staff wellbeing offer including a new Employee Assistance Programme, team days, staff and volunteer Awards events, and flexible working policies. As a result 88% of staff feel their wellbeing is supported at work and 90% feel supported in their role as a carer. This was reflected in the group securing Investors in People Gold Accreditation and the Employer Health and Well Being Award in December 2016.

Training and Development

An organisational development plan was developed in 2015 which identified how we intended to grow the skills of the Leadership Team and succession plan. This included the development of a Leadership Competency Framework which was used to assess performance; providing experience for Operational Directors in different service areas; and opportunities to access external Leadership training.

During this period, the Leadership Team changed with one Director joining the Executive Team and the creation of five Operational Director roles (one being filled externally). A specialist cross group Mental Health Director role was created and two specialist Assistant Director roles developed – Assets and ICT.

While moving members of the Leadership Team to oversee different service areas has had advantages to their understanding of the groups business and cross group working, it has sometimes had an impact on operational performance. In the next three years we need to focus on developing the skills and autonomy of our senior managerial staff.

To date training and skills development has largely been ad hoc and driven by individual services or statutory requirements, rather than the business objectives. Through the business planning process we have identified four main areas of focus:

- Strengthening operational managers
- Improved access and utilisation of data
- Development of the key worker role and expansion of evidence based interventions
- Embed Big Life Way and Asset Based Approach

Monitoring of compliance with training has gradually improved as the HR Database has been modified. In the last two years we have created Job Families to reduce variations of job roles and salaries across the group. We have now a comprehensive competency framework aligned to all managerial posts, which supports staff development. The Job families have also enabled us to clarify training requirements by post.

We will develop a workforce strategy which identifies how we will ensure retention of key roles – Leadership, managerial, specialist and data management – and focus attention on developing the skills of our senior managers. We will explore how we can gain competitive advantage by developing multi therapy training for case worker staff to deliver whole person interventions.

We will also explore opportunities for staff progress by becoming ‘experts’ in their field, rather than moving into managerial roles. We will ensure staff have the ICT skills and understanding of The Big Life Way to deliver a quality service. The Strategy will also provide staff with tools to plan their career and skill development.

Agile working

Mobile working is increasingly important as the group grows and the number of sites we operate from expand. Due to the nature of our contracts, sites may be temporary, or housed within other organisations. Many staff work from community venues and occasionally, from home. As a result, we need to deliver a 'virtual workplace' where staff can work from anywhere using a variety of devices. We need to provide staff with first class connectivity and telephony to be able to operate in this way.

Apprenticeships

	2015/6	2016/7
Number of apprentices	11	7
Number of qualifications achieved	9	7
Number of apprentices moving into work	5	3

In the last two years, apprenticeships were offered in a variety of roles and in all divisions. We had the opportunity to build apprenticeships into some contracts as part of 'added value'. In these cases we were able to pay Campaign Living Wage. In some services we built apprenticeships into recruitment and offered them as entry level jobs – for instance in nurseries, schools and administration roles. However, these were often on lower apprenticeships salaries.

Training was delivered by a variety of local colleges and there was sometimes a financial incentive (up to £1,500) which was used to subsidise the salary.

In April 2017 the new Apprenticeship Levy comes into force. This will cost us £44,000 pa which will be paid to a central fund monthly. We can draw down this funding for training staff and apprentices. In order to ensure we make maximum use of the funding, we will manage this process centrally. Through the workforce strategy, we will identify the training needs of each division and priorities spend accordingly.

We will consider establishing ourselves as a training provider so that we can maximise the impact of the funding available, and explore opportunities for course and qualification development to provide us a competitive advantage and a new income stream.

Volunteers

	2012/3	2013/4	2014/5	2015/6	2016/7
Number of apprentices	101	290	367	428	

The number of volunteers has increased year on year, however, although we are confident this reflects the trend, the information may not be completely accurate as it has been sourced from reports by individual services.

We have championed a 'change exchange approach' recognising that volunteering offers a great entry route for people into work and training, whilst at the same time providing us with a very positive way to enhance service delivery. In the last two years we have introduced volunteering to children in our schools, who have undertaken roles such as mentoring. This is something we will continue to grow.

The Big Life group has maintained its accreditation with Investors in Volunteering and a working group has consistently met to share best practice and review the policy and procedures. The working group has also overseen an annual Volunteer Celebration, which has gone from strength to strength. There are some challenges to ensure participation by all staff who manage volunteers in the working group.

Collection of volunteer data and outcomes is variable across the group. We will design and implement a central system for monitoring and recording progress of volunteers. This will also ensure the quality of volunteer management through consistency of approach.

Service Users

Recently, and influenced by austerity, NHS and public services are being driven to use asset based approaches, to recognise peoples strengths and how they can be used to develop a culture of self-care for individuals and in communities. Phrases such as personal and community centred care are used to describe different ways to support people. This approach has been championed by Big Life for over 20 years, and it is how we developed many of our services, centres and activities. It is how we work with people to identify and develop opportunities with them that are not regularly open to them.

The Big Life group offers a number of opportunities for service users to engage with our work including:

- Employment and volunteering. The group encourages people to volunteer or take up work opportunities so that we can benefit from their life experience
- Joining our boards or governing bodies
- Specific service user involvement services, such as Community Voice and Waves of Hope that are commissioned to support the development of the user voice, influencing service and system development.
- Undertaking Service Experience Audits
- Attending DONUTs, a coproduction group that advises on the development of Self Helps services.
- Giving us feedback through comments and complaints,
- Responding to surveys
- Taking part in focus groups
- Exit interviews after completing a service
- Setting up and taking part in community activities or groups

Although we have a lot of experience in service user engagement, and pockets of excellence, delivery is patchy across the group. Some commissioned services can be less flexible and provide less obvious opportunities for engagement.

Over the next three years we will improve on how we engage with individuals and communities and champion the approach we take. We will not take our work for granted, we can't afford to, as everyone is developing asset based approaches. We will listen to what people want, recognising that while we have contract outcomes to meet, when we listen to people, coproducing support with them to achieve their aspirations, on their terms, people can make remarkable changes. Changes that we can learn from, that then enable us to tailor our services differently.

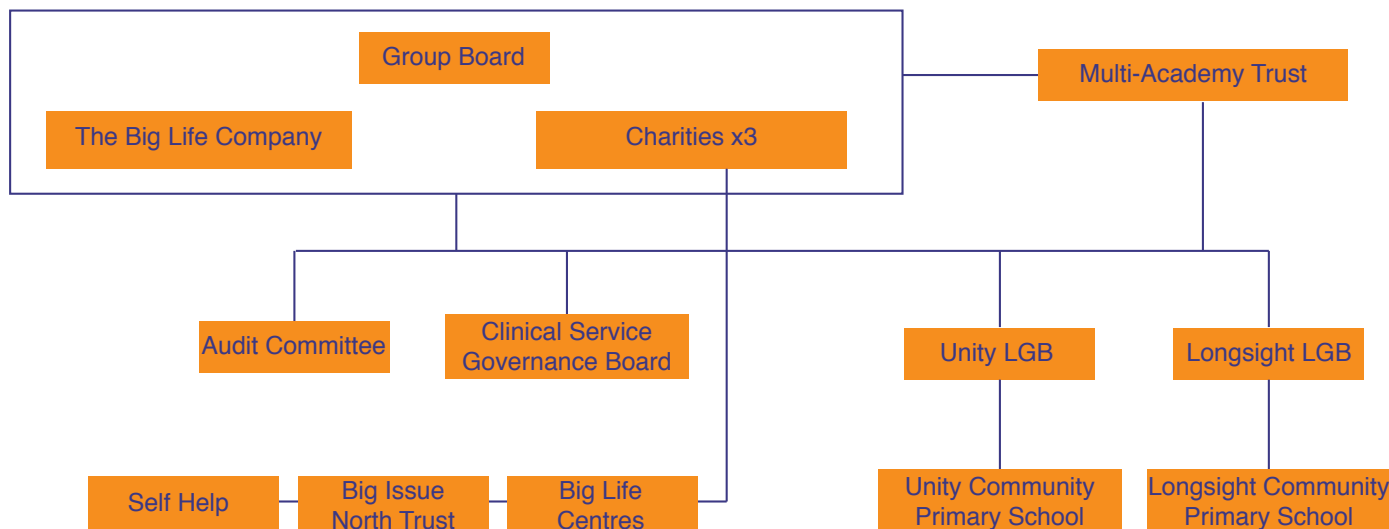
We will do this by updating our Community Engagement policy – *The Big Life Way: A community Engagement Policy*. It will provide key principals and guidance on using person and community centred asset based approaches in all of our work. It will offer a tool kit and resources for using different approaches and techniques suitable to all areas of the group.

We will offer everyone in the Big Life group training in Asset Based Approaches, to develop staff confidence and understanding of asset based approaches and how we can embed it in our work. We will ensure our staff know how to facilitate asset based practice, have the skills and techniques to see people not as problems, but as a solution.

We have an opportunity to show our leadership and expertise in engaging with communities. We will share our progress through blogs, case studies and stories to highlight how we have used asset based approaches in our work and what difference it has made.

Governance

The BigLife group



Corporate Governance

The Big Life group comprises five legal entities – The Big Life Company; three charities (Self Help, Big Life Centres and Big Issue North Trust) and Big Life Schools Multi Academy Trust. They operate as one consolidated group. The Big Life Group Board comprises Non-Executive Directors, Executive Directors and Trustees of the charities. It oversees the Big Life Company and the charities. It has two sub committees – Clinical and Service Governance Board and the Audit and Remuneration Committee chaired by members of the group Board.

Big Life Schools Multi Academy Trust has a separate board, but it is chaired by a Trustee of the Big Life group. It is also represented on the group sub committees. It has two sub committees – LCP and Unity Governing Bodies, which are chaired by members of the MAT.

As part of the Business Planning process we have reviewed the governance arrangements of the group, testing them against the Corporate Code 2015, and reflecting on the lessons of Kids Company and learnings from the Housing Association sector (With the benefit of hindsight, HCA 2015).

Overall we concluded that the governance structures work well and we have a skilled team of Non Executives and Trustees who work co-operatively but independently with the Executive Team.

Over the past year we have simplified the group structure (as complexity was one of the risk factors identified in a number of corporate failures) merging the social enterprise companies into one legal entity (the Big Life Company). We have retained the three charities as separate entities, as there seemed little to be gained from formally merging them due to the need to account separately for their restricted income.

The group board meeting together enables Trustees and Non-Executive Directors to oversee the group as a whole, rather than just their part of the group. This, together with regular visits to services has enhanced their understanding and engagement and ability to work as a team.

The sub committees have both been enhanced in the last year. The CSGB Chair has joined the group board as a Non-Executive Director and in the new year will commit additional time to act as CQC lead. We have appointed a new Chair of Audit and two new members to enhance the skills of the committee.

Going forward, it is proposed that the Chair of Audit be appointed as the Senior Independent Director (SID) and take responsibility for the group Chair Appraisal. The timings of the Audit Committee meetings have now been formalised so that it meets between group Board meetings and receives regular financial reports. Big Life Schools MAT have a Trustee on the Audit Committee and it is proposed for completeness that they also nominate a member for the CSGB.

There is a positive culture of learning lessons and openness about challenges between the Executive and Board members. However, improvements could be made by introducing stress testing to new business proposals to avoid underestimating risks.

Big Life Schools MAT meets separately to the group board and this is thought to be required to ensure that the MAT has the focus it needs during this period of development. The Schools are a very new addition to the group and require the input of experts in the field, which the MAT Board offers. Whilst group Board and MAT members have met together for strategic conversations and at group events, the separation of the two boards does pose a challenge for culture and oversight of the group as a whole. Currently the Chair of the MAT attends the group Board, but that is the only overlap of Non-Executive membership. It is proposed that another MAT board member joins the group board. In addition, the Group and MAT board will meet together for a joint performance review annually and the Group CEO report will be included in MAT board agendas.

Going forward will be to ensure that the MAT board is able to adapt and change as new schools open or join. Currently all local GB Chairs are represented on the MAT board, and a senior staff member from the Big Life group is on every Local Governing Body.

Group Board members receive KPIs and Management Information on all areas of the group at Board meetings. In addition they undertake visits to different service areas to meet staff and services users; and receive internal communications – Big News, Big Bulletin and Big Source. It is proposed that this be extended to all MAT members. All board members (Group and MAT) are invited to an annual strategy meeting, the Staff Awards and a Big Life Friends event.

A pilot to align the governance meetings to school terms in 2015 and 2016, has not proved positive and Group Board members believe three meetings annually has not provided them with sufficient oversight. As a result, Group Board meetings will return to quarterly dates in 2017.

Board induction and minimum training requirements have been identified for each role. Further work needs to be done to embed systems and processes for planning and recording training needs and compliance by Board members.

Corporate Governance recommends a fixed term of office for Board members and appointment to boards by a Nominations Committee and a formal process of appointment. The Big Life group has never adopted this approach, as it has valued the consistency of Board membership and has had sufficient natural turnover to ensure independence and avoidance of 'group think'. Annual appraisals are undertaken by Chairs, of all Board members, and if performance isn't satisfactory, offices are terminated.

A regular skills audit is undertaken to ensure that we recruit members to fill any gaps identified. This is matched with a diversity audit which ensures the group board has connection with the communities it works within. It is not proposed the change this at this time.

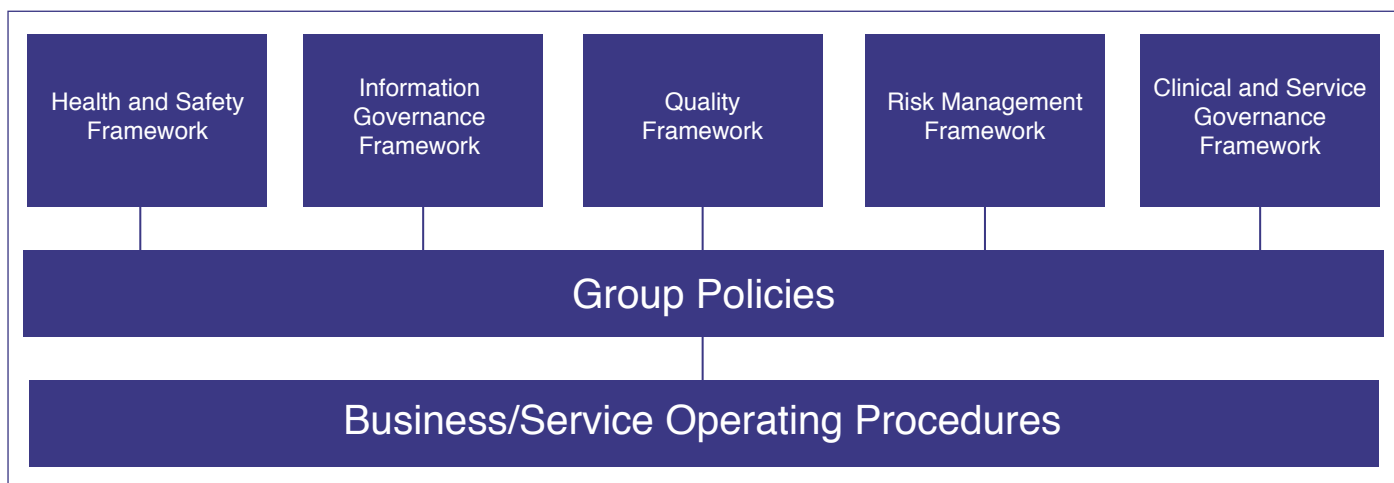
	Number	Percentage
Board members in office for less than 2 years	17	53
Board members in office for 2-5 years	18	56
Board members in office for 5-10 years	2	6
Board members in office for over 10 years	5	15
Number of BME board members	6	18
Number of female board members	19	59

Governance has now become a major piece of work and in the past it has been managed by the CE Personal Assistant who has doubled up as Governance Lead. It is proposed that we identify specific resources to fulfil this role across the group.

Clinical and Service Governance

The Big Life group have a comprehensive system of Clinical and Service Governance which has been embedded over the last five years. A Clinical Service Governance Board, chaired by the Medical Director of the Group Board, brings together all the Executive Directors, Operational Directors and Leads to review Health and Safety, Incidents, Accidents, Service User Feedback, Information Governance, Safeguarding and Adults at Risk issues. Annual Reports have been produced which collate the number and type of incidents and actions taken to learn lessons and improve quality and safety. Lessons learned are cascaded through the Big News and Big Bulletin to all staff.

Currently a variety of databases are used for storing and collating information on clinical and service governance. In the next three years we will invest in a comprehensive system which is simpler to use and provides an audit trail.



Frameworks have been introduced to describe how the group manages quality, risk, and information governance, Safeguarding and Health and Safety. These are supported by a comprehensive set of policies and local operating procedures. The HR Manager is responsible for ensuring all Policies and Frameworks are updated at regular intervals or in line to statutory changes.

Quality Audits have been introduced across all the case management services. These are still relatively new and sporadic in some services and often focus on compliance with form filling rather than quality of analysis or information provided. Further work to embed this with peer auditing, showcasing of best practice, training and skill development in the next three years. The number of different audits is also posing a challenge – both in the time consuming nature of auditing and the overlap between different audits. In the next three years we will refine the audit process to ensure that it is efficient and effective.

We have adopted external quality management standards to provide a benchmark and independent audit of our processes and systems (ISO2001, CHAS) and these have provided a useful aid to driving continuous improvement. Going forward we will need to embed these across the group. In addition we will explore an environmental quality mark to help us raise awareness and minimise our impact on the environment.

Our workforce plans will consider opportunities for employing clinical and expert practitioner roles as a means to driving quality across the group.

The Health and Safety Framework and Policies have been updated in the last year and now provide greater guidance for staff. Health and Safety Representatives have been appointed for the first time in all service areas (previously we had lead roles which were less defined). Over the next three years we will embed the role of H&S leads, ensuring that they provide feedback from the workforce on key issues and improve the safety of our services.

Information requests have increased considerably in the last five years, and we have created an effective system for ensuring that we provide appropriate information in compliance with statutory requirements. The number of Information Governance breaches has also increased, but this is consistent with the increase in the volume and type of work carried out. All of them have been investigated and reported as required. Where we have had Information Governance breaches we have been able to take action and evidence improvements – for instance introducing Cryptshare to share information securely by email.

Information systems and data

Getting accurate information, in a timely way, which enables us to understand our performance is a key priority. The Big Life group requires a range of information from financial performance, Key Performance Indicators and Quality data, to impact measurements.

Significant investment has gone into IT over the last five years. We employed an Assistant Director and two IT staff; procured a new IT provider for the group and for two new schools; developed the Big Life People database; completed the upgrade of the HR database; upgraded SAGE finance systems and introduced three new software solutions (Connect, Poppies and PCMIS). We need to ensure that we have the resources to both implement new software solutions, and staff with the skills to process and collate information. The workforce plan will identify how we will meet this challenge.

Interacting with our customers

As austerity bites and we are required to do more for less, commissioners are increasingly looking for 'self help' solutions, which cost less and reduces the demand on public services. In addition customers are looking for more opportunities to interact with our services in a timely and personal way. For instance, parents want to see what their children's nursery day is like and Big Issue readers want to know more about the vendors they buy from. Digital communication methods are expanding and we need to ensure that we maximise these opportunities to engage with our customers. At the same time we need to ensure that people who face barriers, such as lack of access to a computer or a smart phone, are not disadvantaged in accessing our service. We will support people and work with partner agencies to increase digital inclusion.

We have not routinely used digital channels to communicate with our users and we will explore how we can expand these options and make our websites more interactive. We will develop a digital strategy and explore appropriate use of web chats, text messaging, skype and so on. We will identify requirements for offering information, advice and guidance and evaluate how to facilitate this, including further rollout of our service directory and training of our frontline staff. We will explore online learning resources available. In the education sector, virtual learning environments (VLEs) allow students to access online learning materials as well as assessment, student tracking, collaboration and communication tools. We will look at the potential for a VLE platform, working with all divisions to ensure that any solution is fit for purpose, not only for service users but also for staff.

Centralised systems and data protection

Building on the work we have already undertaken, we need to continue to improve our internal processes and systems to provide a standardised and consistent approach. In particular we will develop:

- A centralised system to monitor volunteers, placements and apprentices and understand our impact
- A quality management system, which facilitates storage of documents, auditing and reporting of incidents including safeguarding.
- An improved payroll function, with the option to move to a new supplier

As we become reliant on technology, we generate and store more and more data. This makes us increasingly open to cyber-attacks. The EU GDPR directive will come into effect in 2018 and we will have a duty of care to ensure our data is securely stored. Our information security policy sets out the principles and practice for ensuring that our organisation complies with legislation and adheres to good practice. To further protect ourselves, we will:

- Review our infrastructure and create a cybersecurity policy and implementation plan
- Work with our ICT suppliers to further evaluate if their infrastructure meets our information and cyber security requirements, including preparing for the GDPR

Social accounts

We will ensure that a social accounting framework is embedded within our service delivery. This will enable us to:

- Demonstrate our social, economic and environmental impact (Prove)
- Continually improve service delivery (Improve)
- Be accountable to our stakeholders (Account).

Measuring our impact was a key priority five years ago and remains so today. It enables us to improve what we do and be competitive. In the last five years we purchased and developed the Big Life People case management system, which has been an essential element to the delivery of the Working Well Pilot and Being Well Salford. It has enabled us to collect a wide range of data and add to the data sets as we review the information and service delivery. However, due to commissioners and prime contractors specifying case management solutions, we currently have nine different client management systems across the group. This can restrict our access to data and reduce flexibility. It also poses a challenge to how we collate comparative performance and outcome data across the group. In the next three years we will:

- Review our client management systems to identify any opportunities for consolidation
- Support services to adopt an integrated, person centred approach through enabling them to join up systems and share data
- Work with divisions to evaluate how data analytics can support them to work smarter and more efficiently

We need to identify the outcomes we need to measure across our services and carry out a review to ensure that data is being held in the appropriate system. We then need to identify and evaluate tools and solutions to help us create better ways of visualising and presenting that data to a variety of audiences. Access to community insight data will also support this process.

The quantitative data that we share needs to be backed up with stories of our success, while the qualitative data that we produce through case studies needs to be strengthened with relevant data. This is crucial to allow us to demonstrate our expertise and to create a coherent sense of the Big Life Way. For instance, we will provide qualitative and quantitative evidence of the impact of employing people with life experience, and delivering services in partnership.

In the past research activities within the group have not been joined up, and have tended to be reactive (i.e. us helping others get answers to questions, rather than others helping us get answers to our questions).

Going forward we will establish a research group comprised of subject matter experts in health and wellbeing, children and families, and skills and employment, to review all research requests that come into the group; and develop and implement a group research strategy. The research group will ensure that research activities focus on getting answers to questions that we are interested in. It will establish relationships with academic institutions so that we can broaden the resources we have available. We will aim to ensure that all of our work is underpinned by a proven research base, and where we are innovating new services – that we research its effectiveness.

Stakeholder communication

Over the last five years, as traditional communication methods in the print media have declined, we have diversified the channels we use to communicate with a wider network of stakeholders. In 2002, The Big Life group had a website, and some (but not all) staff had an email address. Today, we have 11 websites, 527 email addresses, 8 Facebook pages, 6 Twitter accounts and profiles on YouTube, Instagram and Pinterest. In 2017, we sent 9899 social media messages, seen 3.7m times. We created 30 videos watched by 2026 people, while 295,987 people visited our websites.

We now have 15,210 Twitter followers over 6 handles – the most popular of which are Big Life Tweets, We Are Self Help and Big Issue North. Keeping up with innovations in communications will continue to be a key priority. In the next three years we will ensure that our websites are upgraded and we will trial new methods of sharing our messages with our stakeholders – including podcasts.

The lack of consistent data and use of a variety of measurement tools across the group, has meant that compiling reports has been time consuming and challenging. Combining data with good qualitative stories can also be resource intensive. The improvements we plan to make in collation of data will enable us to respond to news events and proactively target campaign messages about the lives of people we work with.

We have developed the 'Big Life Friends' who receive quarterly news updates and are invited to an annual network event. We have produced and distributed annual Impact Reports for the past five years, showcasing our work. We have taken the first steps to develop a customer relationship management system in order to identify our stakeholders' interests and relationships, and will continue to embed this in order to further improve and target our communications.

We will use the new business plan as an opportunity to refresh the group Brand, ensuring that key messages reflect the Big Life Way and the groups expertise in delivering whole person interventions. We will develop a brand strategy which will ensure that the right message is put before the right audience.