



# My Life Legacy Business Plan 2019 - 2020



# Chairman's Report



It has been another very good year for My Life. The charity has grown and that growth is planned to continue over the coming three to four years.

The number of learners supported at My Life Learning has doubled and all those learners who are eligible for a further year's education wish to return. Day opportunities has shown a steady increase in members at both Standish and Leigh sites. The charity has been asked to extend the advocacy contract it has from Wigan Council. We have invested in new facilities on the Standish site: a new café, improved respite lodges, and more accommodation for our staff and members. At Leigh we are considering expanding into further accommodation.

Most importantly, My Life has launched My Life Support. This is something we have always wanted to do; to provide care and support for people with complex and enduring needs in a very person centred way in the community – where they live and where they want to be. To do this we have invested in advance of the first few cases 'going live' and are now gradually building up our staffing and processes.

The quality of the care and support we are able to demonstrate from the outcomes that our members attain and also from the number of unsolicited enquiries we receive. The retention rate of those members who use our services

is very high but we strive overall to enable our members to move on and live the life that they want.

Referring and funding organisations are now approaching the charity to support individuals with complex and enduring needs. Families often worried about the future care of their loved one when they no longer can provide it themselves see My Life as a trusted organisation.

Growth brings with it challenges; the need for improved processes and systems without losing the ethos of the charity. We have recognised this and commenced a thorough work programme to review all of the systems we use and, where necessary, to redesign the processes in order that they are fit for purpose going forward. This 'business planning' will be a major management focus of the coming year.

Our ability to continue to deliver high quality personalised care and support is due to our staff and the positive working relationships we have with individuals and their family members, referrers, professionals. We look forward to a further successful year working for and with all of our members and families.

**Steve Jones**  
Chairman

# Executive Summary

From the Chief Executive Officer



My Life is a charity developed by families for families who have a loved one of any age or ability who needs support, and who are looking for meaningful things to do with their day. It was inspired by a small group of people who really wanted to develop a sustainable life for their loved one that was both of high quality and person-centred in the event of something happening to a family member.

The charity itself is one that continues to look forward and is evolving into a model that is sustainable – after all our ambition is to support families for many years to come. Whilst funding is critical to do this, it is our workforce that is our most valued asset, therefore we are continuing to build a team that has the ability to drive the culture and ensure what we are learning is embedded into practice.

Since its conception around my kitchen table in 2012, My Life has been nurtured to evolve and grow in a way that the community both need and want. The 'My Life Way' is about considering the whole family and we strive to ensure that we don't just support the individual themselves but think about what makes sense to the whole family.

The following Business Plan reflects the fact that each area of the charity has its own specialism which is embedded in the My Life culture of enabling every individual to flourish, recognising each person has their own skills and gifts.

**Caroline Tomlinson**  
Founder and CEO





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# Background

**My Life is a community of ordinary people from the towns of Wigan and Leigh and the surrounding areas across the North West, a community which has come together to work for a better life for local people. We are passionate about achieving real change.**

**Our passion stems from the fact that each of us has had direct experience of struggle – struggle because of poverty, disability, the lack of educational opportunities, or sometimes simply as a result of who we are and how others see us.**

We have struggled to be part of mainstream society, to make a contribution to that society, and very often we have struggled to discover our true identity and how we can live a good life on our own terms. Some of us have experienced these things directly for ourselves, some of us have close family members who have had to struggle and been excluded in this way and for some it has been friends or neighbours.

Members of the team at My Life have worked in education or the care system for periods of time, and we have seen that traditional approaches often fail the people we care about. This is

not usually because of a lack of compassion, instead it is more often because things start with an unhelpful set of assumptions – a focus on the question of “what’s the matter?” without giving enough thought to “what matters” to the person seeking help. Traditional services start from the best of intentions, but their staff don’t always seem able to really get to know the person and stick with them, walk with them as we say, when the going gets really tough.

Despite these negative experiences in traditional services, many of us have acquired skills which we are now able to adapt and bring to bear through our work with My Life Support, our service helping individuals to plan and organise their support. We find that most of those we work with are very ready to talk, to tell us about their passions and enthusiasms, about the important people in their lives, and to share their hopes and dreams for the future. Asking

“what matters?” does seem to make sense to people, and it gives us a basis for encouraging a person to think about what they want from life and the support they want and need in order to get there. As a team, we are proud of the skills we bring, and we firmly believe that they provide us with a strong foundation on which to build.

The spark for My Life was provided by Caroline Tomlinson, whose son Joe was one of those people who, from a young age was excluded by society. In founding My Life, Caroline drew upon her learning in assisting Joe to build a life for himself. She also drew upon her later work for the charity In Control in promoting person-centred approaches and personal budgets in care and health. In this way she was able to lay down the foundations for My Life Support.

Caroline continues as the inspiration and the driving force of the organisation. In this, she is assisted by many members of the local community, including Steve Jones, former chief executive of Wigan Council. Steve supported Caroline in devising and developing what became a “personal budget” for Joe and is now Chair of our Board of Trustees.

In many ways those who work as volunteers and paid staff at My Life are the community in Wigan and Leigh. They are the people who, through the relationships they forge and the unconditional acceptance that they demonstrate, ensure that we will succeed in our ambitions to build a better life for people as members of a more inclusive, welcoming

society. This is the reason why our workforce is our most precious asset in the years ahead.

This Business Plan sets out our broad thinking for the next phase of My Life’s development. It builds on our work at our two existing sites in Standish and in Leigh and moves us more wholeheartedly into the community, closer to where people live and work through My Life Support. It tries to reflect and incorporate the things that individuals and families have told us they value about our work, as well as the conversations we have had with commissioners in care and health.

The Plan is about building community in a time of austerity: we know there is less money around for care services, and we know that there are more people than ever who need support. The Plan is also about enabling choice and control for all, through providing an infrastructure to make the most of personal budgets, direct payments, personal health budgets and the personalisation of support services – approaches which were introduced over the last fifteen years or so but which have yet to realise their true potential.

Our hope and our firm belief is that if we do what we know works for people, if we really listen to them, if we see who they are and what they have to offer – each person different – **if we walk alongside them, then we can go on to do great things.**

# About My Life Legacy

My Life Legacy was originally established as a not-for-profit community interest company (CIC) in June 2012. Our success has meant that we have flourished and grown rapidly over the past seven years.

We are a company limited by guarantee and became a registered charity in June 2016. We felt that this would allow us greater opportunities to continue developing our unique community-led offer for the benefit of more people.

We are striving to be an organisation which meets compliance and regulation frameworks, whilst delivering high quality, person-centred support.

We have been designated to deliver personalised support within the legal frameworks of the Children and Families Act 2014 and Care Act 2014. We are developing a model called 'My Life Support' to deliver integrated personal commissioning within the NHS England Framework.

**The objects, as set out in My Life's governing document are:**

- To promote social inclusion for the public benefit by preventing people from becoming socially excluded; relieving the need of those people who are socially excluded; and assisting them to integrate into society by the provision of support, education and practical advice throughout England and Wales
- For the purposes of this clause 'socially excluded' means being excluded from society, or parts of society, as a result of age, ill health or disability
- We primarily deliver locally across the North West but are rooted in the heart of the Standish and Leigh communities in Wigan borough. We actively get involved in all aspects of community life, encouraging people we support to be integral and active contributors. All that we do is inspired from the needs of local people

# Our Vision

Our vision is simple – for people to have a good life. Our belief is if we all give a little, we all gain and grow together.

Our goals are based on the Citizenship Model and focus on seven key themes:



**Freedom**

For people to have the freedom to live the life they choose.



**Money**

To be financially secure by having a sustainable income and money for support, as required.



**Self-determination**

To have real choice and control, but understanding that the more choice and control you have, the more responsibility you need to take.



**Housing**

To live in the right environment, with people you choose to be with.



**Direction**

To have a plan for the future, no matter what age you are.



**Support**

To have support provided in a way which makes sense to you.



**Community**

To have friendships, relationships and be able to contribute to your community in a meaningful way.



A man with a beard and a baseball cap is working on a project with a young boy. They are in a workshop or garage setting. The man is holding a piece of wood and the boy is looking on. The background is slightly blurred, showing various tools and equipment.

## Our Mission

To work in a person-centred way with people of all ages who may need support to achieve a good life for themselves, and to enable people to feel in control of their own lives, have the emotional support to get through the tough times, and have all the information and help they need to work out their own solutions.

## Our Values

We are one team, working in a collaborative manner, with no artificial or perceived boundaries;

- We celebrate and value the contribution of all people to society;
- We respect individual aspirations and needs; and,
- We broker and/or provide person-centred high quality, life-enriching services.





## Overview

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We are an innovative and growing charity that connects people of all ages in need of support with their communities.

We were formed because of a passionate group of people wanting to offer something different to members of their families. Their desire was to be able to access far more personalised care and support for their loved ones.

Our founding members wanted much greater choice and control over their own lives than had traditionally been made available to people with disabilities through health and social care services. They wanted an opportunity to lead meaningful lives and be active contributors to their local communities. But most of all, they wanted to make friendships and relationships that would keep them safe for the rest of their lives.

Importantly, we seek to promote independence by giving people a 'hand up' rather than a 'hand out'.

We pride ourselves on our asset-based approach to community development. This means we can recognise and nurture the skills, gifts and talents of individuals to make a positive and lasting difference to people's lives.

We are a membership-based charity operating out of two location hubs in the North West of England that are equidistant from the cities of Liverpool and Manchester: Thompson House Equestrian Centre (Standish) and Leigh Sports Village. We have recently acquired an office base location at Smithy Court in Wigan where we host My Life Support and Wigan's Care Act Advocacy Services.

Our membership is diverse and widely drawn from across the UK but primarily in the North West.

We provide a range of daytime opportunities, information, guidance, advocacy, coaching, training and support in education, health, care, employment and planning for the future. By enabling several social enterprises to operate under our umbrella, we integrate our activities into and with the local communities. This allows us to provide real-life learning opportunities and to play a full and active part in those communities.

We are registered with the Educational, Skills and Funding Agency providing a wide range of bespoke educational opportunities for 16 to 25-year olds with special educational needs and disabilities (SEND).

We are registered with the Care Quality Commission and currently hold a 'Good' rating from our first inspection due to not operating for very long. Excellent work with longevity brings an 'Outstanding' rating from the CQC.

We are an AIM Awards accredited training provider and people of all levels of ability can work towards recognised qualifications in a wide range of subjects.

Our objective is to create meaningful opportunities that can be individually tailored.

Primarily, we are about giving people a purpose, independence and a sense of belonging. Through the provision of quality support, education and practical advice, we help reduce and prevent social isolation and loneliness.

With individuals, their family members and carers, we craft and implement cost-effective, innovative, personalised solutions to achieve the lives that individuals with complex continuing needs strive for. We reach positive outcomes by maximising funding streams, listening, and thinking through solutions to the whole life needs of the individual.



# Aims

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By focussing on the seven keys of Citizenship, we aim to assist people to achieve a lifestyle change and to participate more fully in their communities in ways that make a real, sustainable and positive improvement to their lives.

We feel we have a unique offer for those seeking our support or wishing to work with us.

We were among the first people to make personalisation happen and have done it for ourselves and our loved ones. We know not only what it is like to support and care for people, but what it feels like and what the stresses and strains are.

We have a history of supporting people successfully, a deep knowledge of personalisation, the ability to scale using the best IT systems that we developed ourselves for this express purpose, and we can make markets, so we get the most cost-effective solutions.

We plan with individuals, thinking laterally about what monies might be available and what other resources we might access to meet their aspirations.

We work with those with whom we have a trusting relationship. We think through all aspects of what might be necessary, from care to housing, from specialist support to opportunities to be part of the local community. We are local and therefore have that local knowledge.

Finding and sustaining the right carers is vital. We recruit, train, match, manage and give ongoing support to personal assistants and other carers. If this is not done well, very little else will work for an individual.

We create an infrastructure, so local families are able to live their lives and age with the confidence that their loved one will be loved and cared for, for the rest of their lives.

We offer the space, place and opportunities for people to come together to build natural connections and friendships. This enables us to facilitate relationship-based support, which provides an infrastructure and back-up support from familiar people if an individual's regular team are on holiday or are sick.

We have brought together a team of individuals who have an in-depth knowledge of community-based health and social care market solutions. They bring with them a vast experience of personal budgets and the services that relate to them.

We bring innovative thinking and solutions to the delivery of more effective care services, providing better care outcomes and value for money solutions for the NHS and Local Authority budget holders, based around local communities.

My Life improves the quality of life of those using our services through promoting social inclusion and providing meaningful opportunities to relieve the effects of social exclusion; be that because of age, ill health or disability.







# Our Services

## Thompson House Equestrian Centre - Standish

Since autumn 2014 we have evolved on the 84-acre Equestrian Centre in Standish and offer a whole array of opportunities for all ages which include:

### Day Opportunities

Our vast range of Day Opportunities include animal care, doggy day care, equine assisted therapy, horticulture, dance, drama, crafty experiences, yoga, bush craft, outdoor adventure, cookery, woodwork, site maintenance, off site activities such as swimming, shopping and so much more. Each individual coming along has a wide and varied programme to choose from, whether they have high or low needs they are encouraged to enjoy and take part in a wide range of opportunities. Current attendance based on 50 people per day averages out at 80% capacity across the week. We will be looking at how we can increase this over the next year.

In addition, we work to support the transition for children and young people through our all-inclusive holiday club as well as working with a variety of schools, giving their students taster days. The attendance for this isn't significant but is of high quality and helps with transitional relationships and assessment.

### My Life Learning

A fabulous opportunity for 16 – 25-year olds with SEND to Prepare for Adulthood. The My Life Learning model, which is registered with the Education, Skills Funding Agency, provides a person-centred curriculum for all of its students. There are a wide range of subjects to explore such as animal care, horticulture, media, music, dance and drama as well as embedding literacy and numeracy skills into subjects of real interest to an individual. In addition, we offer real work experience and placements across the community where individuals are fully supported with our experienced job coaches.





## Our Services

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### **The Stable Door Café**

A significant investment is the creation of The Stable Door Café which is a public facing café hosting locally grown and sourced feel-good food in addition to our Pop-Up Kitchen which serves our students and members lunches. Not only do we offer a fabulous dining experience, but equally coach our students and members in catering and hospitality. The vision for The Stable Door Café is to increase the options on site and off site to offer a wide variety of catering options which can be showcased at various events and drive the field to fork initiative.



# Our Services

## Hospitality

The Standish site has three accessible Holiday Let style lodges for individuals to stay with their family, their own support and with support from the My Life Support team. Two of the lodges were funded by Wigan Council’s Deal and have been a lifesaver for many individuals and families.

**The lodges can offer: -**

- A short break for individuals – with support provided by your own family, team or My Life Support
- A place to help develop independent living skills
- A location to have a short break with friends (we can support 2 or 3 people sharing)
- An opportunity for My Life Support to assess and build confidence for individuals who would like to move home from a residential or clinical setting
- Emergency Respite with My Life Support
- An excellent training or meeting venue
- A great place to not only stay but to choose to join in activities on site or go out
- Job coaching for members in hospitality
- Themed breaks for individuals and their families or small groups e.g. equine assisted therapy, outdoor adventure, country crafts
- An option for people travelling with individuals who need accessible facilities or who have dogs or horses





## Our Services

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### My Life Support

In the summer of 2017, we became Care Quality Commission (CQC) registered which enabled us to provide support to individuals in their own home. Our first customers came to us in November 2017 and since then we have grown to provide support to 38 people in their own homes. Many of the individuals we support have Personal Health Budgets or Personal Budgets through Social Care or a small minority self-fund. The individuals all have very different but complex needs and require very specialised and bespoke teams around them.

Through My Life Support, we are now gradually building up our staffing and processes. We have done this in a fairly wide geographical area and particularly in East Lancashire where we have been a very active part of the Pilot Personal Health Budget programme with Calico, Alocura, and the East Lancashire CCG. My Life senior staff have trained Calico staff to enable them to prepare support plans, refined our attraction and selection of people wishing to become Personal Assistants through our Pathways2Employment Programme and developed personalised recruitment of teams of Personal Assistants for individuals.

My Life Support we believe will continue to grow. We will not provide care and support where funders are engaged in a ‘race to the bottom’ in terms of the unit price they will pay for care.

Organisations that agree to do this find that the quality of care suffers, staff turnover becomes impossible to manage, and continuity of care is lost. Quality and continuity are the elements of sustainable care and support that individuals most want and need.

My Life Support engages with those with very complex and enduring needs. This is the charity’s ‘unique proposition’ and is becoming known by referrers and funders. The needs of these individuals are large – they may require ten or more Personal Assistants – and the processes for managing those needs are complicated. My Life Support in association with Alocura has developed many of those processes so that the growth we anticipate in this area can be handled well.

### Support Planning

A support plan works in a person-centred way to look at all of the options for individuals and find a solution that works for them. It may be that My Life is part of that solution or it may not. Our ethos as always is to work in the best interests of the individual to help them plan for both the short term and long term, considering all aspects of their life.

A support plan is developed with the individual, their family, friends, professionals and any other important people in the person’s life. It is designed to look at what they want their life to look like and the steps on how to achieve this, utilising the funding available and the assets available to them in their local community. We will help them to find and choose who they want to support them and how they want this to work.

We have a team of highly experienced support planners who will guide individuals through this process and will look at achieving positive outcomes. This can include setting people up as employers or finding a great care provider, right through to sourcing housing and meaningful things for people to do. The list is endless but equally it is about making it happen on the ground for people in a way and at a pace that makes sense for them.

### Advocacy

My Life deliver the Local Authority contract for statutory Care Act Advocacy across the Wigan borough. We also provide occasional general advocacy. We have been delivering the service since January 2016. We are contracted presently to 31st March 2020.

This includes providing independent advocates for people who have a substantial difficulty in at least one of four areas of engagement and don’t have an ‘appropriate individual’ in their lives to advocate for them. Within this entitlement criteria we primarily participate as advocates for vulnerable individuals during care act social care assessing, social care reviews and safeguarding enquiries.

We also provide a much smaller amount of general advocacy which is very diverse in nature and is delivered according to informed appreciation of significant need and holistic value of intervention.

Through our admin/helpline provision, we provide signposting to services and deliver information and advice services to clients, as this is intrinsic to the role of a knowledgeable advocate helping a person’s views be represented.



## Our Services

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### Leigh Sports Village

In June 2015 we inherited Future Steps from Wigan Council which was based at Leigh Sports Village. Over time we have increased the capacity and developed the hub as a place for individuals to learn a wide range of new skills both on and off site. Our vision is to create more options for our members which enable them to flourish in ordinary life and build their confidence so they can contribute to their community in a way that makes sense for them. This will include a wider option to learn skills in media and production, the arts, eating well for less, getting out more – which includes finding exercise options that people enjoy and big upcycling initiatives to help save the planet.

We are currently looking at expanding by renting an additional space that has the potential to increase the membership by a third. This will increase the current numbers from 16 – 20 members per day to around 30 per day over time. This won't necessarily mean a big investment in staffing.

### Smithy Court, Wigan

In July 2019 we needed to extend our workspace and now have a central office which is far more conducive to office-based work. The My Life Support team together with the Care Act Advocacy team are based in this space. This has enabled us to free up more space at Thompson House Equestrian Centre for our students and members to use.

## Membership

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My Life has always stated that we work with people of all ages and abilities. We pride ourselves on using the social pedagogy model that fundamentally is about building and fostering positive relationships.

We don't have a 'typical' customer, we have members who represent a wide range of people from the community and if they think we can help them we generally can. We work on the premise of trying to find positive solutions that enable and help individuals to achieve a good life. From conversations to offering free training to actual support, we do what we can to help and support as many people as possible.

My Life has always prided itself on being a membership organisation and the ethos of creating a sense of belonging is what has worked, setting us apart from many different organisations. People contact us initially for information and advice which is freely given and then this may transpose into a conversation that is about "can you help me?" This has been the basis on which the charity has evolved – we find a problem and work hard to create a solution.

This is fed into our **Funnel** which identifies the gaps that people tell us and enables us to identify where our enquires come from and how people get in touch. We offer support to

individuals and their families in understanding how the system works and make suggestions of how they could explore the options discussed with more vigour.

The next stage is the **Pipeline** which is when a much more solid referral comes through usually from a funder but equally could be from the family themselves. We look into much more detail about what an individual requires and make recommendations for the next step, where we work out the solution with the individual.

If a solution needs to be explored we will work with the individual and their family to develop, if they would like, a **Support Plan**. Sometimes councils do their own support planning, such as Wigan, but this is less commonplace in Lancashire or with Personal Health Budgets.



## Quality Assurance

We have an experienced team of Quality Assurance Officers who work directly with all of our members to ensure that they can equally contribute to the development of the organisation.

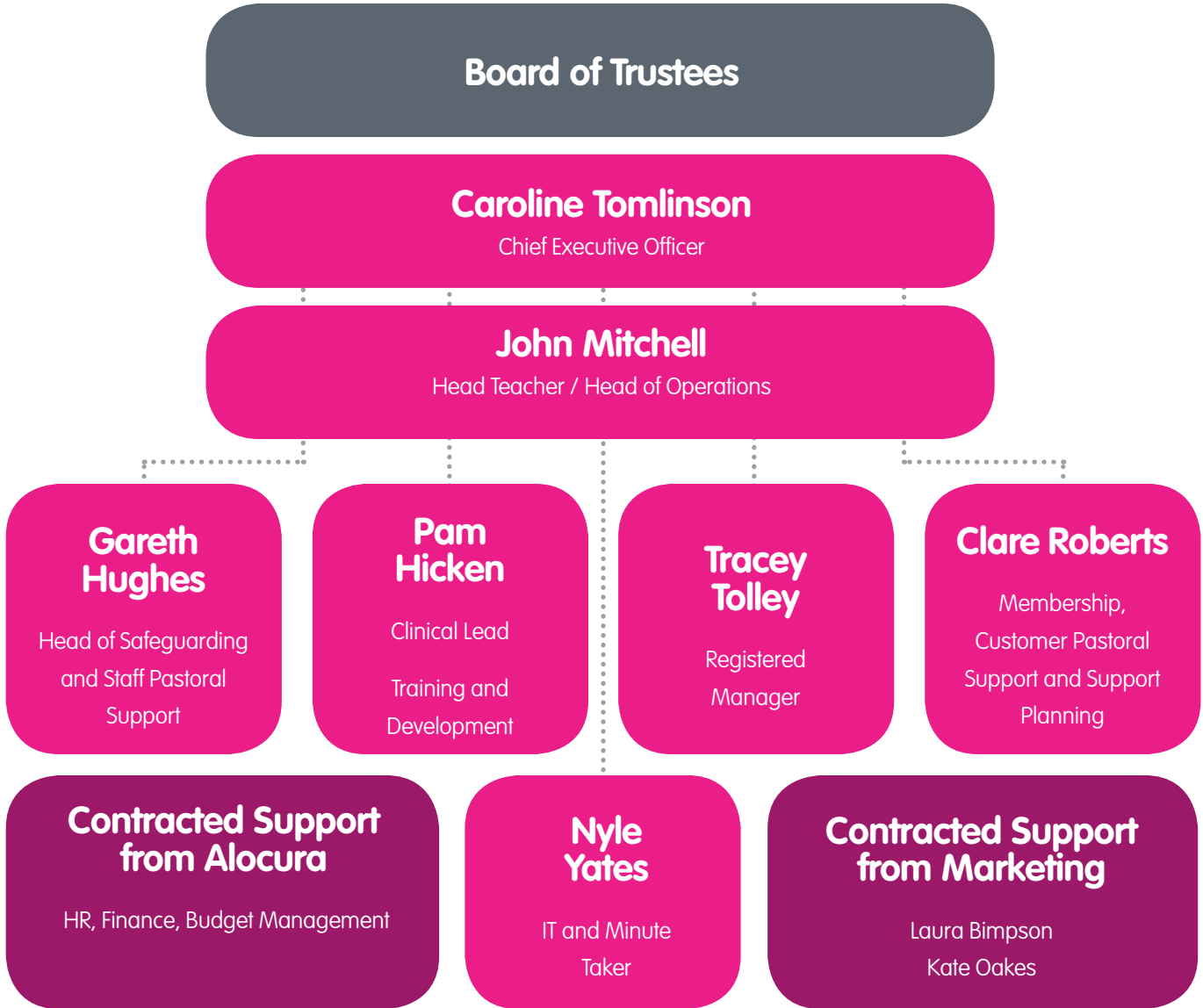
The team meet members and their families and published reports are developed which are shared with the CEO and the Board of Trustees, who publish their response.

We are able to demonstrate the quality of our care and support from the outcomes that our members attain and also from the number of unsolicited enquiries we receive. The retention rate of those members who use our services is very high, but we strive overall to enable our members to move on and live the life that they want.

Referring and funding organisations are now approaching the charity to support individuals with complex and enduring needs. Families often worried about the future care of their loved one when they no longer can provide it themselves see My Life as a trusted organisation.



## Organisational Structure





# Board of Trustees (BofT)

We are governed by a highly experienced Board comprising of eight trustees, who give their time freely to the charity (with the exception of our founder who was employed as CEO in mid 2016 but who remains an important trustee).

Their expertise and time have been invaluable to the growth of My Life and to it becoming self-sustaining. The Board of Trustees meets formally every 8-12 weeks to set the direction and priorities for My Life and to monitor performance.

All Board Meetings are fully documented, and decisions are by committee. Any conflicts of interests are declared at all meetings and Board members must leave the meeting if such items are discussed.

Being a trustee means making decisions that will impact on people’s lives. They use their skills and experience to support the charity, helping it to achieve its aims. Trustees also often learn new skills during their time on the Board.

The Board of Trustees (BofT) has recently been extended to bring a wider range of expertise. This will give the charity a lot of help and support to further extend the development of each of its departments. The Board meet quarterly and provide governance and oversight to the charity.

## Board Members

- **Steve Jones** – Chair (holding the Board and Executive Team to account for the charity’s mission and vision)
- **Amanda McDonough** – Trustee (Staff Feedback and Whistle Blowing)
- **Alan Bell** – Trustee (Business Oversight)
- **Helen Gaskell** – Trustee (Governance and Safeguarding)
- **Steven Noonan** – Trustee (Finance and Audit)
- **Kevin Massey** – Trustee (My Life Learning)
- **Dave Galvin** – Trustee (Customer Feedback)
- **Caroline Tomlinson** – Trustee
- **John Mitchell** – Staff Representation

## Senior Management Team

My Life has a Senior Management Team (SMT) which has grown significantly, so we are about to restructure to the following:

### Members of SMT

- **Caroline Tomlinson** - CEO
- **John Mitchell** – Head Teacher / Head of Operations
- **Tracey Tolley** – Registered Manager
- **Pam Hicken** – Clinical Lead
- **Clare Roberts** – Membership, Pastoral Support and Support Planning
- **Gareth Hughes** – Safeguarding and Staff Pastoral Support
- Support from Alocura – HR, Finance and Budget Management
- Support from Marketing
- **Nyle Yates** – IT / Minute taker

The SMT will be an effective executive team with strategic focus, who will work towards the vision for the organisation and will invest considerable time and energy at a strategic level. They will balance risk and innovation, anticipate future needs and opportunities, and seek to ensure the organisation’s sustainability.

They will work together taking an enterprise wide view of their individual and team functions. They will model for the entire organisation ways to break down silos and will develop solutions to business problems together. They will prioritise the interests of the charity over everything else.

They will be intentional in their interactions. They value their differences, listen and communicate well, seek input from each other, and trust and respect one another. These behaviours make teams more effective. Crucially, they also model for the rest of the charity what team interactions should look like.

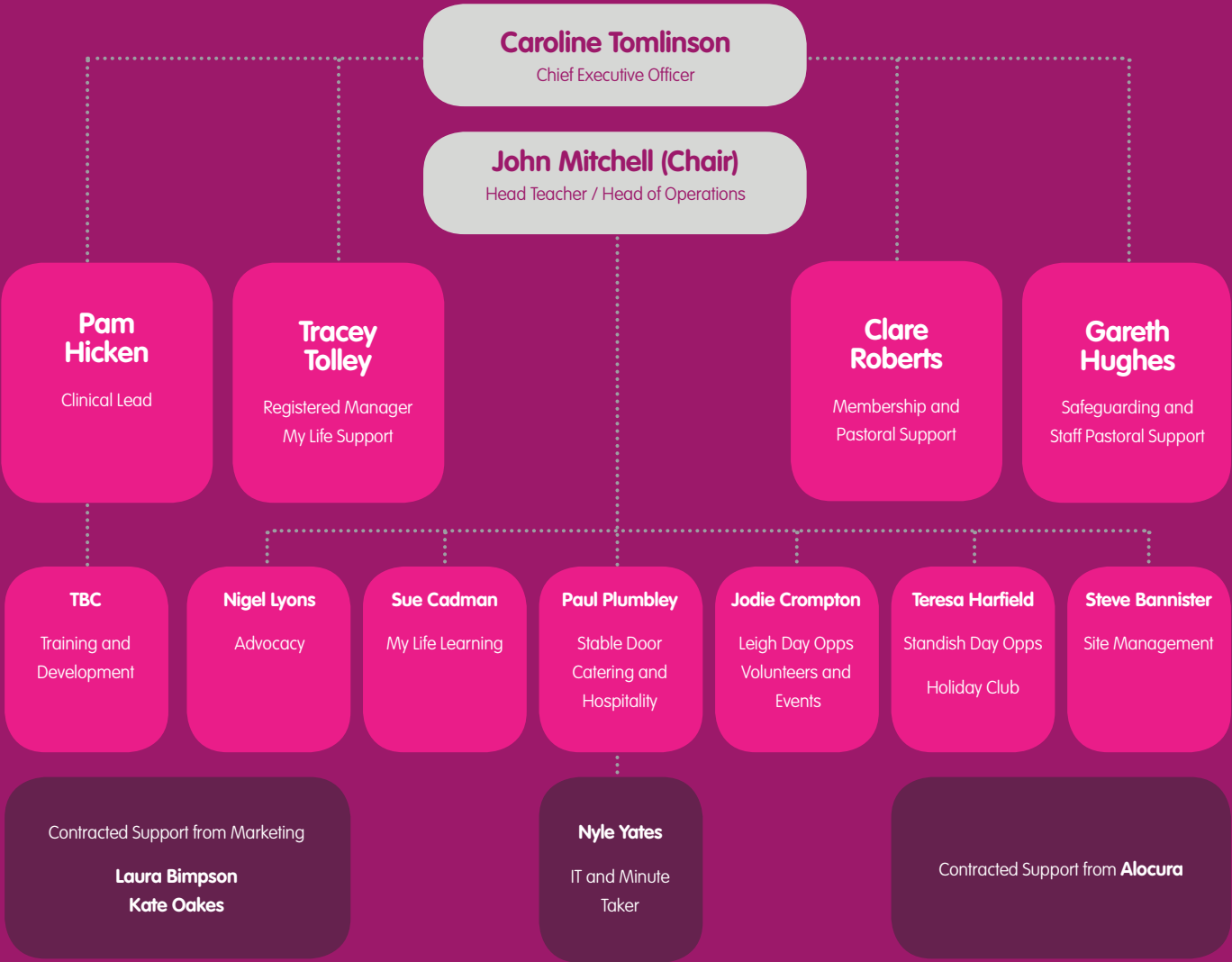
### The SMT will meet monthly and will be responsible for:

- The business function of the charity
- Quality assurance and performance
- Good communication across the organisation, embedding values and the culture of the organisation and external relationships
- Managing risk, overseeing health and safety and maintaining the risk register
- Implementation and review of policies and procedures
- Workforce – recruitment, retention, training and development, pastoral support, HR
- Finance – overview of charity, profit, loss, resourcing, capex projects, grant funding
- Problem solving at a strategic level
- Monitoring outcomes and celebrating achievements

Minutes will be shared across the staff teams – anything confidential will need to be issued as separate items e.g. safeguarding issues.



# Senior Operations Team (SOT)



At the heart of our strategic vision, our ‘One Team’ approach aims to support creative responses from every member of our workforce in order to benefit each and every person using our services, from clinical care, fundraising, education, catering, horticulture, hospitality, to animal care and the support services. There is an expectation for everyone to support colleagues beyond their own team.

## These are the key areas of the SOT: -

- To ensure that all within the team have a grasp of the charity’s structure, values and purpose and have opportunities for involvement in its further development
- Ensure the maintenance of confidentiality in respect of staff, volunteer and client records and all privileged information relating to the services of the charity, its customers, staff and volunteers and particularly the area for which they are directly responsible
- Promote and foster My Life’s reputation and standing within the community and with private, statutory and voluntary sector agencies and organisations
- The philosophy of My Life is based on a multi-skilled, cross-departmental approach. Staff regardless of grade or discipline, are required to participate in this concept. The role of volunteers is integral with the work of My Life and paid staff are required to underpin this in their attitude and actions
- All staff must be empathic towards our customers and their families and able to project the philosophy and concept of My Life
- My Life has in place provision for staff support. Staff are expected to exercise responsibility in accessing and providing whatever forms of support might be appropriate for them to ensure that they are able to offer the professional care and support or other duties for which they are employed





# Senior Operations Team (SOT)

**The SOT will meet monthly on a cycle which will follow the SMT.**

**Senior Operations Team Members**

- My Life Learning – **Sue Cadman**
- My Life Support – **Tracey Tolley** or **Pam Hicken**
- Day Operations Standish – **Teresa Harfield**
- Day Operations Leigh – **Jodie Crompton / Kim Mirrelson**
- Volunteers and Events – **Jodie Crompton**
- Site Management – **Steve Bannister**
- Hospitality and Catering – **Paul Plumbley**
- Office / IT – **Nyle Yates**
- Advocacy – **Nigel Lyons**
- Membership, Pastoral Support and Support Planning – **Clare Roberts**
- Safeguarding – **Gareth Hughes**
- Marketing – **Laura Bimpson/Kate Oakes** as required
- Training and Development – TBC, as required
- Alocura – Finance and HR as required

**They are responsible for: -**

- Departmental budget management including procurement as appropriate
- Health and Safety - day to day operations including all aspects of risk management
- Asset management - maintaining standards in each environment within which the team works
- Excellent customer relations with individuals, families, professionals and others
- People management - workforce planning, recruitment and selection
- Departmental communication and staff support
- Performance management
- Staff development including regular 1-2-1's, and annual appraisals
- Staff support including Health and Safety and wellbeing awareness
- Facilitation of a culture of learning and respect for difference
- Personal development - induction of staff and identifying training needs
- Monitoring outcomes and data which assists the charity
- Regulations according to the departments
- Meetings with funders and associated business
- Putting in grants for funding in line with the strategic direction of the charity
- Reporting to the Board of Trustees

**Departmental Meetings**

These are held as often as required and need to be minuted and fed into SOT, SMT and the BofT. They include the Department Heads and their teams.

**Staff 1-1's and Appraisals**

All our staff receive 1-1's every 12 weeks (or proportionate in line with the hours they work). They receive an annual staff appraisal and are encouraged to get on a CPD pathway.





# Business Support

## Finance and Human Resources

No organisation can function without high quality business support. From the end of 2017 early 2018 our predicted turnover was increasing, and the infrastructure needed to manage the finance and HR functions was becoming much clearer. We had tried to operate on site with this work, but this wasn't conducive to the technical skills required. We decided to subcontract out to Alocura who had the ability to manage HR and Finance and were already working with us to manage Personal Health Budgets as a significant part of our work during this time. Although we have all been learning together, we have really started to build an excellent and efficient way of working.

## IT Support

For any organisation working in today's world, you cannot do anything without using IT. My Life has excellent IT support and has developed a first-rate suite of IT technology which is working well. The challenge has been that many individuals who are skilled in front line delivery are not as computer savvy as you may wish – so training and development is critical for the wider benefits of the organisation.

We are currently going through an IT review which will consider the business needs of both My Life and Alocura and will make suggestions as to how to align things better, using the IT resources and tools we already have more effectively and making any required recommendations.

## Marketing

Marketing has always been critical to the evolvment of My Life and our presence has a far reach, with over 5000 people across the world now following us on social media. We had inhouse marketing support for a number of years which we utilised well, but we needed to do things a little differently. We now have two people working freelance to market the organisation who have been excellent in bringing all our materials up to date and supporting the organisation in the public domain.

We are now ready to share our learning with our peers and other critical organisations, and really want to spend the next couple of years building our external training and development portfolio to share our learning over the past few years as we believe we have a model that is worth franchising with a social conscience.

## Training and Development

Our workforce is our biggest asset and our ambition is to create a hugely successful team that is well equipped to deliver high quality training in all aspects of care, support and life. We now employ over 150 staff who all work in very different environments providing high-quality person-centred care and support – many have significant skills and gifts to share.

We have developed a competency framework in which all our staff are employed. Regardless of their starting position staff are encouraged to develop a career pathway through this framework. We invest heavily in staff training and development and encourage every member of staff to join a continual professional development journey using our My Life Training and Development Passport.

We have recently launched our Give, Gain and Grow Training and Development Programme which invites people to offer training (GIVE), identifying their training needs (GAIN) so we all can GROW together. From this we will be launching our full programme of training and development across the organisation to be launched in September 2019.

In addition, we are building up our outward facing Training and Development portfolio and will be offering training to external organisations which include Hampshire CC, South Tyneside CCG, Cornwall CC, Harrow Council, Greater Manchester Consortia, Lancashire Parent Carer Forum and potentially more. This brings in a whole array of sharing learning and a brilliant knowledge exchange as well as income that can be reinvested in the charity.





## Measuring Impact

Working in a person-centred way, we judge our ongoing success through the improvements we are able to help bring to people's whole lives. We use the nationally recognised Personal Outcomes Evaluation Tool (POET) to gather feedback and to measure an individual's personal journey and the tangible difference we are making. In addition, this provides information and evidence that means we continually improve by comparing our performance and sharing best practice with other organisations.

We use 'distance travelled' measures to identify an individual's progress against a range of wellbeing factors at agreed intervals. This allows us to evaluate the return on cash invested in achieving 'softer' outcomes (e.g. increased self-esteem, the social value created).

We have developed our own software tool in partnership with the Social Value Consultancy, called the Social Profit Calculator. This tool draws upon Treasury approved data from the Global Value Exchange and is accredited by 'Social Value UK'. The tool will help us to measure the efficiency savings we create.

## Managing Risk

We have in place strategic risk management arrangements. Through this, we have taken stock of what we consider to be the key external factors that are likely to have either a positive or negative effect on the sustainability of our operations over the period covered by this Business Plan:

- Impact of central government cuts/policy changes to key commissioners of My Life's services, i.e. local government, health and further education;
- Poor level of awareness amongst health and some social care professionals of the rights to personalisation conferred under the Care Act 2014 (right conferred to those funded by social care, not health funded clients at this time);
- Limited level of awareness amongst eligible personal budget clients of their legal rights (social care) and/or ability to request a personal budget (health);
- Limited level of awareness of alternative (to traditional institutional based health and social care services) support services - like those available at the My Life sites - amongst members of the community and/or carers who are not eligible to receive financial support from health or social care, i.e. self-funders; and,
- The potential of emerging sub-regional commissioning models favouring bigger service providers with existing economies of scale in the sector.

My Life operates a full risk register which is governed by the Senior Management Team and is overseen by the Board of Trustees every meeting.





# Finance

It has been another very good year for My Life. The quality of the person centred care and support we have continued to provide for individuals remains exceptionally high, we have grown through personal recommendations rather than overt marketing, and we have invested in the future activities and facilities of the charity drawing prudently on some of our cash reserves.

The underlying revenue position if our new investments are excluded is strong and getting stronger. We are no longer a charity predominated by income from donations, grants, or block time-limited contracts.

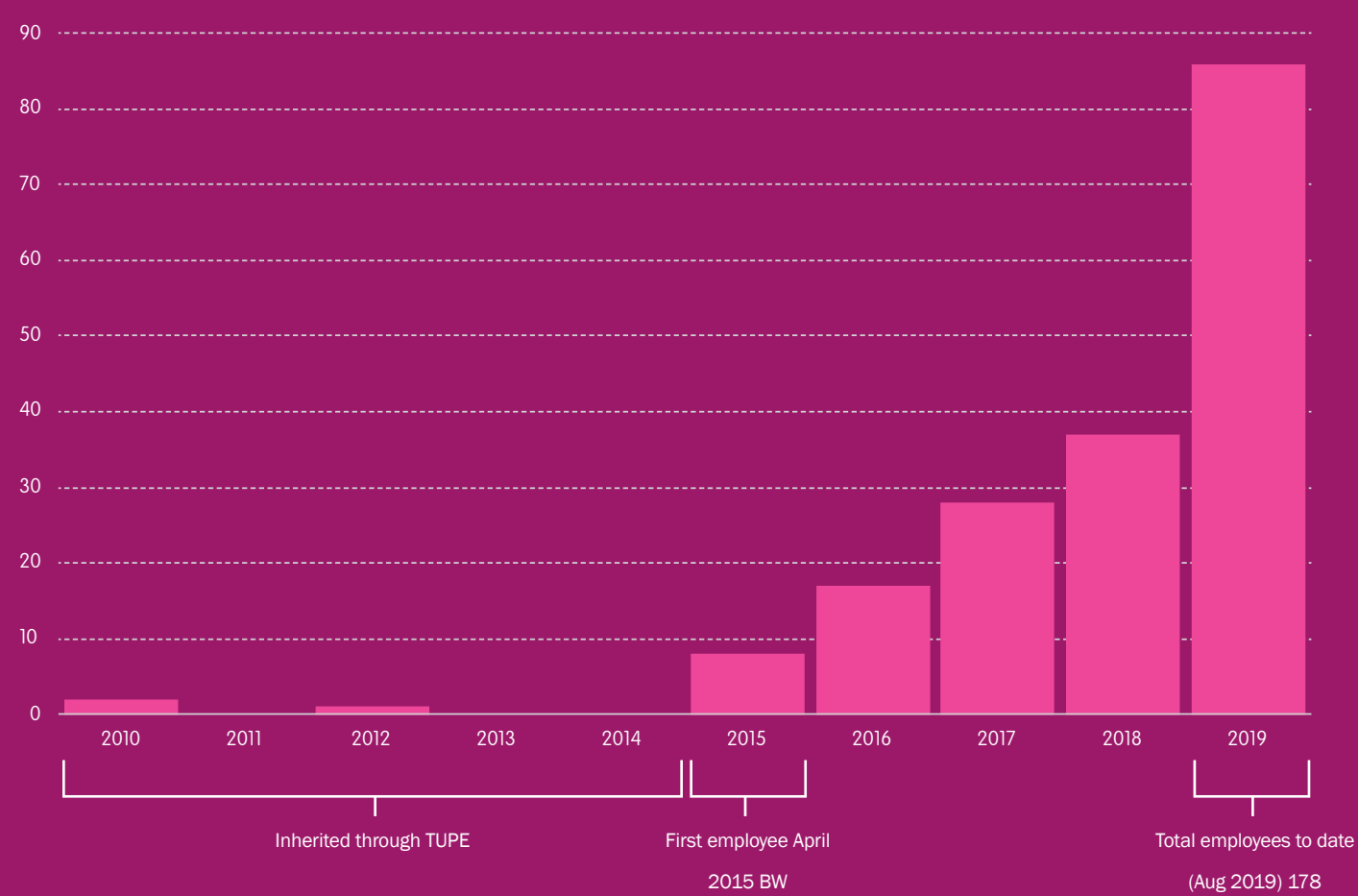
These are still very welcome and are put to good use, but now most of the income of the charity derives from individuals who chose to buy services from us using their own resources or exercising their right to use their Personal Budgets (be it in social care and/or health care) with a trusted provider.





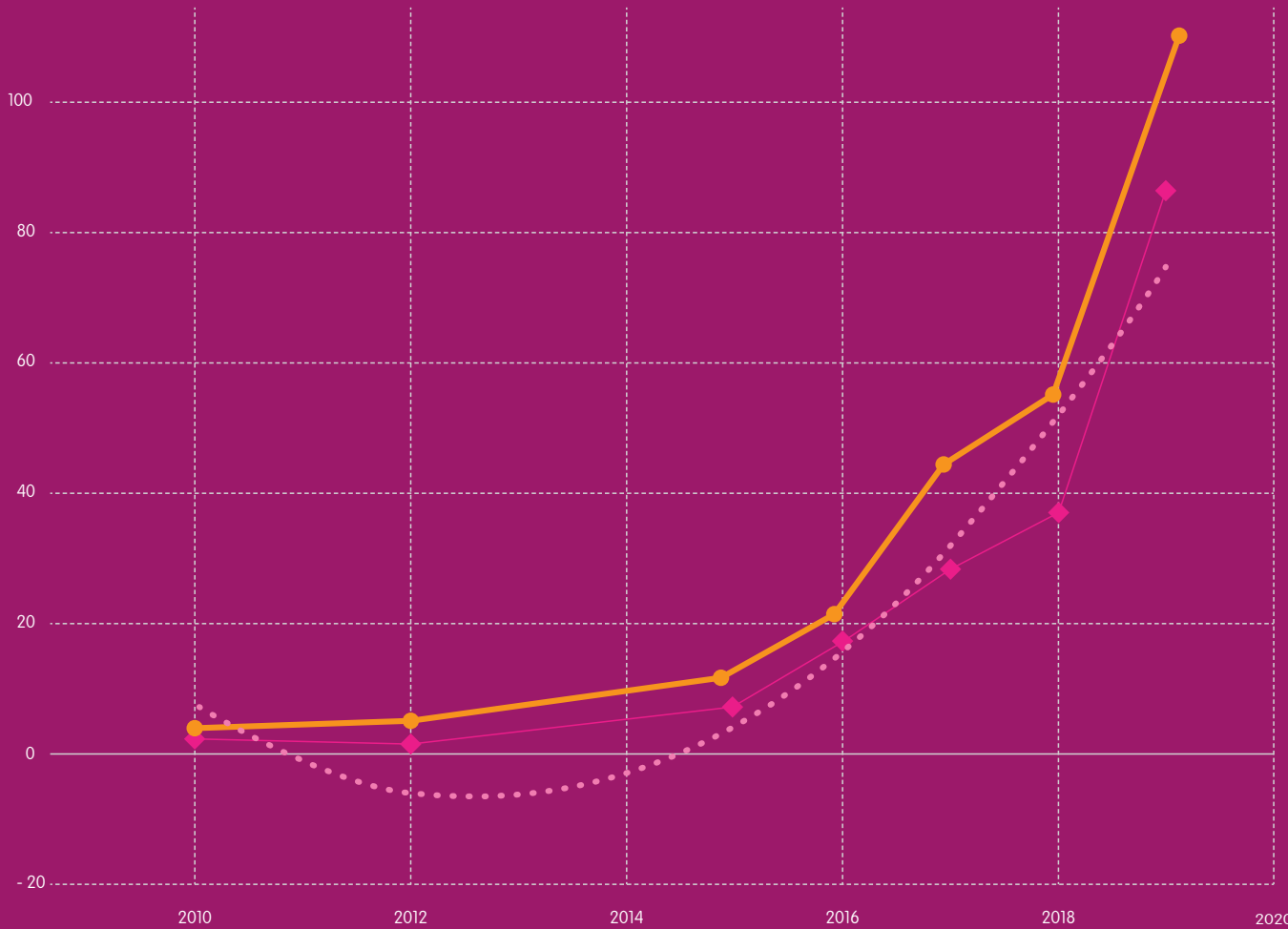
# Employee Growth and Revenue

The number of people employed by the charity has grown dramatically, as illustrated by the following graph.



# Employee Growth and Revenue

A comparison of employee growth and revenue made by the charity demonstrates that they have a direct correlation. The revenue-to-employment gap is positive and increasing, enabling future growth (with 2016-2017 and 2017-2018 being key indicators). This is clear verification that the current employment and business strategies are effective for long-term scale.





## Conclusion

Work has been undertaken within My Life to create robust departmental Business Plans, ensuring that our work can be quantified, assessed and improved upon, with each department clear on its future objectives and strategies for achieving these.

It is important to recognise however, that whilst each department has differing individual goals, these all come together to achieve the overarching aim of My Life – to enable every individual, regardless of who they are, to live their very best life, one in which their own needs, wants, skills and gifts are recognised. This is the My Life Way.







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