

Strategic Plan St. Joseph's Pastoral Centre 2010 – 2012



Aims of the Strategic Plan

- To **respond** to the strategic objectives
- To **re-assess** our situation and renew the strategy
- To **create** a realistic action plan deriving from the objectives
- To **underpin** the action plan with a financial plan including budget
- To **plan** the sources for the finances in a related Funding Plan

St. Joseph's Pastoral Centre Strategic Plan 2010-2012

Executive Summary:

The Mission: The Mission, which is 'to support individuals with learning difficulties, their families and friends' leads us to affirm the value of each and every life and the person's right to inclusion and participation. We promote and support Gospel values and the 'culture of life'.

Review: In 2009 this support has been given in the varying contexts of:

- the Activities Centre in Hendon where some 120 adults access a portfolio of courses and therapies which promotes their personal development and place in society
- the 'Outreach' in the Diocese, where the focus is on supporting participation in the faith life and social community of the parish
- and new this year a developing social advocacy project whose aim is to enable families to gain their rights in economic, educational and leisure provision through information and advice

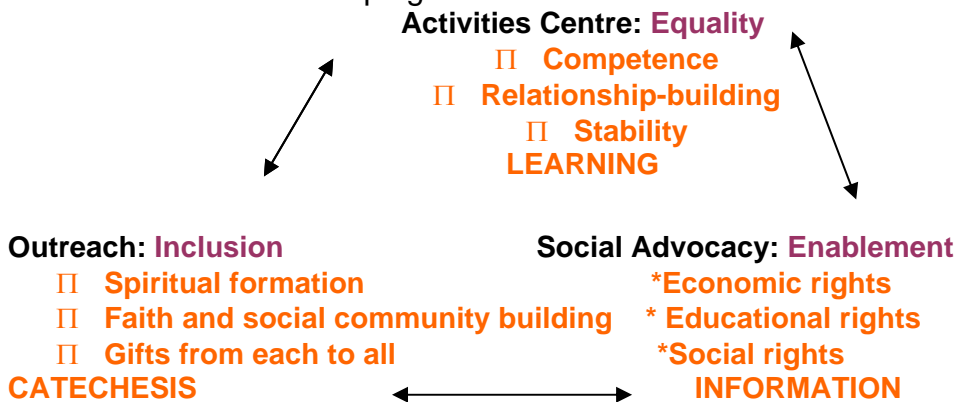
The cost to the Diocese has been exactly as budgeted, whilst the full planned and energetic programme has operated. Quality has been improved and our profile in the Diocese raised. Staff and volunteers have demonstrated much hard work and commitment to achieve this and new staff and Management Committee members, recruited this year, bring new energy and ideas to the mission work.

Strategic overview

What impact on society do we want to have?

We want to see a world where attitudes are changed, so that people with learning disabilities can engage with the world on an equal footing; where they are included in community and faith-life and assisted to participate; and where they are enabled to achieve the rights due to citizens.

How does St. Joseph's look and organize itself in order to make that impact? A coherent model is developing.



Objectives

The strategic objectives cover 4 areas:

- finding and reaching out to people with learning difficulties and their families in the parishes
- the provision in the Activities Centre, aiming to help the person to reach his or her full potential
- development of the profile
- the development of fundraising capacity

Significant progress has been made in the achievement of our strategies as detailed in the previous three Plans, with but 2 key areas, PQASSO (a quality assurance scheme) where accreditation has yet to be attempted, and the work on creating a sustainable volunteer cadre is unfinished. Of great moment has been the development of our skills and resources in communication with people with learning disabilities via symbol supported resources and signing.

Looking Forward: 2010-2012

Building on the quality in the Activities Centre (where we reaching building size limitations) and the capacity of the Outreach (where we have not touched some areas) will be the focus, with an organisation-wide strategy of '**Go to the Olympics and Paralympics**' forming the context. So we will in:

Year 1: **Assess and evaluate** the potential. Develop the self-esteem and confidence of individuals, staff and students. The theme of 'seeds' encourages this nurturing of foundation skills.

Year 2: **Make ready**. Develop the social skills, the competence to travel, and develop the accessibility programme to enable individuals to be volunteers in the work or spectators at the events. Seek further resources – volunteers and, say, a mini-bus to enable the project

Year 3: **Participate**. Join in this iconic moment in society using developed skills and organisational capacity. We hope that our people, trained in the official Olympics volunteer programme, can work as volunteers in the games. We also hope to be able to take or support groups to enjoy this London event together with other local citizens.

Detailed **Operational Objectives** for each area of St. Joseph's are in place.

A **Budget summary for 2010, and a Financial Plan for 2011 & 2012** are also available.

This document has been critiqued and approved by the Management Committee of St. Joseph's Pastoral Centre, and the Pastoral Board of the Archdiocese of Westminster.

Helen O'Brien
Director
October 2009

- A Mission and Introduction**
- B Review of the year 2009.**
- C Strategic Overview and Strategic Objectives 2010- 2012**
- D Operational Objectives**
- E Budget 2010 and Financial Plan 2011-2012**

A: Mission and Introduction

St. Joseph's Pastoral Centre has been working in the Archdiocese of Westminster for over 30 years. Its inspiration was in the need of families in the parishes for support from their church in living their faith and their lives whilst lovingly caring for a child with learning difficulties.

The Mission is 'to support individuals with learning difficulties, their families and friends'.

The work and activities that we undertake are described, evaluated and indeed celebrated in this document. In all that we do we affirm the value of each and every life, and call on our parishes and communities to enable people with learning disabilities to access and be included in all aspects of life. We promote and support Gospel values and the 'culture of life'.

B: Review of the year 2009

St. Joseph's has continued to deliver and develop its support to adults and children with learning disabilities in various ways and in different contexts:

- In the centre in Hendon some 120 adults, in the much commented upon warm community atmosphere, access a portfolio of courses and therapies which promotes their personal development and place in society
- in our 'outreach' in the Diocese, where the focus is on supporting participation in the faith life and social community of the parish
- and this year has seen a developing social advocacy project whose aim is to enable families to gain their rights in economic, educational and leisure provision by means of information and advice

By this coherent approach we fulfil our mission to help individuals with learning disabilities to participate with equality of opportunity in their communities.

In spite of the recession the budget has been met – that is the cost to the Diocese has been exactly as budgeted - whilst operating the planned full and energetic programme. Partly because of the need to manage the finances, and partly because of difficulty in filling staff vacancies, our people, particularly in the Outreach, have been stretched. Meeting the work-load has drawn on a lot of goodwill and commitment – a situation which should not continue indefinitely. More resources are needed to sustain in the long-term this vital life-affirming work.

Activities Centre

The centre has now run for a full school 'year' with its two managers, one focused on learning the other on organisation. Whilst there has been the expected settling down period of clarification and communication, the structure has enabled great strides to be made on the development of new and innovative courses, of staff development, and of the management systems.

Our 22 courses support healthy living, independent living and employment skills and leisure activities. Emotional and social needs and the person's spirituality also are gently supported. We are now an ASDAN (Awards Scheme Development and Accreditation Network) centre and certain students are working towards certification. We are writing and developing our own 'Enriching My Life' course, following our partnership with the Southwark Diocese in piloting their course 'Live Fully', and also other new or recent courses such as Horticulture, Cook and Eat, and Music and Production. We plan our first social enterprise in Ceramics, and also new computer courses aiming to illuminate and extend students' lifestyle. Our aspiration is to produce our own accredited courses and resources.

This year for the first time every student received a written assessment, building links with them and their homes. Staff have also enjoyed the first stage of comprehensive training in Makaton signing and symbols use.

Our management systems allow us to identify both total cost and direct cost profit figures for each course and, with the re-vamped database, we can now hold and access important information to support the students' safety and activities. The fee income has risen from £144,000 in 2008 to an anticipated £160,000 in 2009 and 2 major funders for the Activities Centre have entrusted us with 30,000 each, over a 3 year period, with others in the pipeline.

Outreach

This team has been equally busy with developments in parishes particularly in Hertfordshire and North London, new ministries in schools and new types of social clubs.

We took 65 people to Lourdes, and were supported by Redcaps from St. Dominic's college in Harrow as well as some, helpfully, strong young friends from the East End parishes. The fundraising in parishes for this, ranging from balloon races to African evenings, engendered great spirit and support and contributed to the amazing total of £32,000.

In the parishes we have seen:

- 20 + sacramental preparations
- 41 on-going social clubs
- 17 inclusive Masses
- other respite events

We have supported staff and volunteers with:

- enrichment days

- attendance at the SPRED conference
- Symbols of Faith courses.

Lively workshops with schools and confirmation groups have added to our awareness-raising, as too has our presence at the Conference of the Agency for Evangelisation. And we have run appeals in Central London and Hertfordshire, seeking new volunteers in the parishes. A first parish audit, on facilities, accessibility and attitudes, is ready for the youth group to take forward, and forms a pilot for this planned project.

We have completed the scoping project for the **social advocacy** work which we wish to develop and are currently in discussions with a major funder. We are clear that there is a need for this work because we have identified that there are no obvious links or pathways between the families and the scattered or inadequate services. Our 'unique selling point' is the link that our outreach network can forge, via a new and innovative social advocacy information and signposting service, between families and support. The enhanced website, which is in the design and fund-seeking stage, is cutting-edge work and will be important for this initiative.

Operations and Support

In the continuing improvement of the management systems necessary for good decision-making, we have completed the Database project for the Activities Centre and done further work on the website. Occupying, as we do, an old building not purpose-built for its function, we continue the developments needed to meet the needs of our vulnerable clients. Decoration and refurbishment has taken place, enhancing the atmosphere and cleanliness of the Centre while measures are in place to meet the swine flu threat and other health issues. We have installed an electric door accessible to wheelchair users who form an increasing percentage of our students, and have provided other equipment in support of the dignity of centre users.

Funding

New forms of funding are developing, such as legacies and pilot social enterprises, and new volunteers are running different social events. Links are being developed with significant funders, in line with our new strategic objective on Funding, and the results are propitious - with advice and networks from mission-led grants bodies accompanying the funds. The Director's membership of ACEVO (Association of Chief Executives in Voluntary Organisation), CSAN (Catholic Social Action Network) a part of Caritas and the CLDN (Catholic Learning Disabilities Network) have all been most helpful and the latter, in particular, has led to some exciting and innovative partnership working.

Governance

We have welcomed two new Management Committee members this year and new staff members and volunteers in the Centre. We hope by the end of the year to have filled vacancies in the Outreach team also. We said farewell to some, of course, including some very generous volunteers now moving on to planned employment. A particularly sad farewell was to our Choir leader, Ann

MacDonald, who died suddenly in August, and to whom we pay tribute for long, effective and kindly support of the mission. I extend thanks to all for their work, presence and commitment.

During the period September 2008 to July 2009, as well as our usual work, Cardinal Cormac Murphy O'Connor celebrated Mass for us in Westminster Cathedral; the Cardinal also visited us in Hendon as both farewell and encouragement; Bishop Bernard Longley, Head of the Pastoral Affairs Department, spent a day with students and staff in the summer; in July the new Archbishop Vincent Nichols met us on the Hendon site; and we led a major pilgrimage group to Lourdes also in July. Wonderful and affirmative – if slightly breathless.

Building on that year are our strategic plans, specific objectives and aspirations and financial budgets for the next 3 years as described in the following pages.

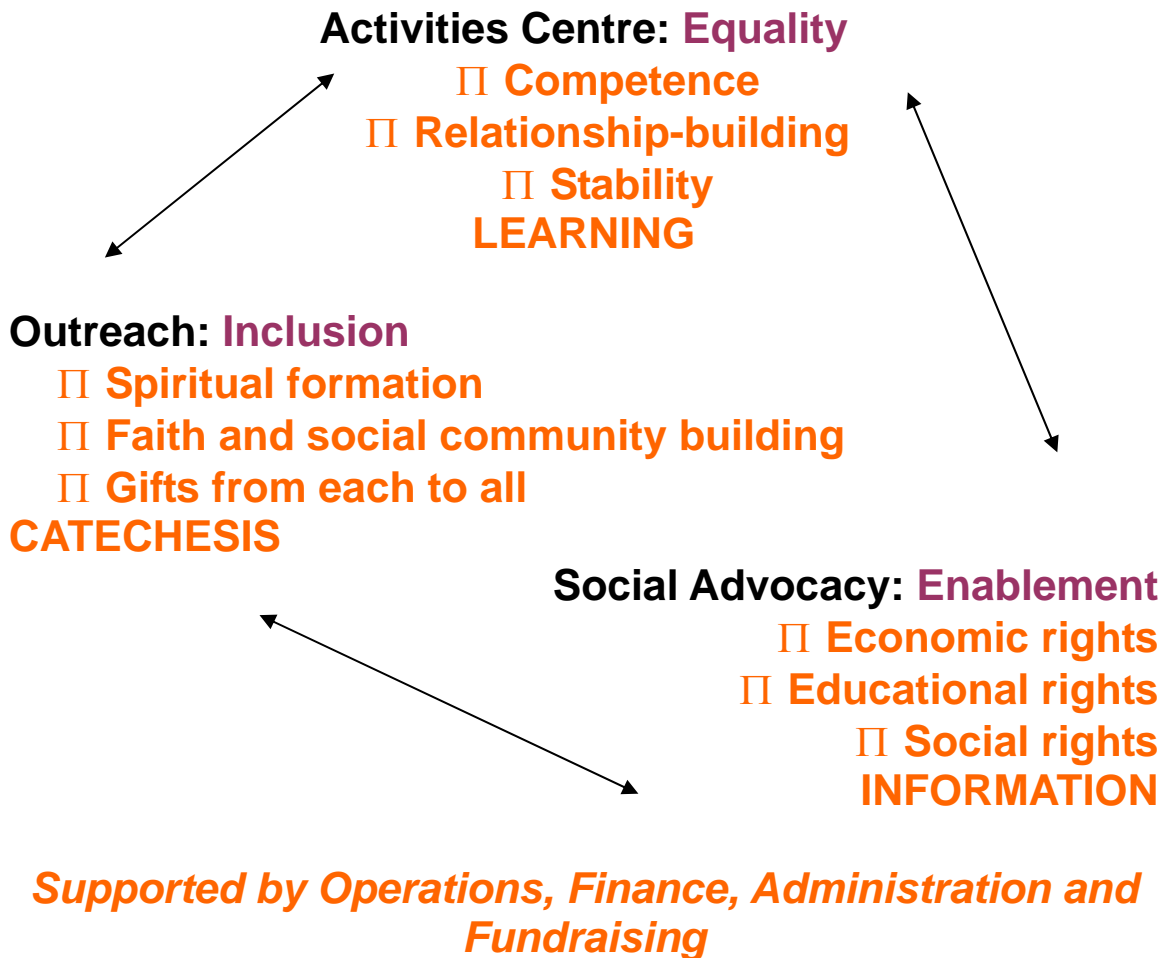
C: Strategic Overview and Strategic Objectives 2010-2012

What impact on society do we want to have?

We want to see a world where attitudes are changed, so that people with learning disabilities can engage with the world on an **equal footing; where they are **included** in community and faith-life and assisted to participate; and where they are **enabled** to achieve the rights due to citizens.**

How does St. Joseph's look and organize itself in order to make that impact?

The different 'arms' of St. Joseph's Pastoral Centre work towards this ideal in different but complementary ways: In the different environments in which they operate, **learning, catechetical, or informational**, we put in place the building blocks of our work to achieve that impact.



How we do it: Strategic Objectives

1. Find and reach out to people with learning difficulties and their families through our outreach provision in the communities and parishes in London and Hertfordshire, and offer appropriate spiritual and social support and advocacy.
2. Provide quality courses and therapies in the Activities Centre at Hendon which aim to enable adults and children with learning difficulties to reach their full potential.

- 3. Develop an environment where people with learning disabilities are a high priority in the Diocese of Westminster and its parishes by means of organisational profile, credibility and quality.**
- 4. Develop relationships with sponsors, major and corporate funders and local communities so that we may acquire sustainable funding whilst enabling others to achieve their social and ethical objectives.**

Review of progress on Strategic Objectives

Many of the aims which resulted from the over-arching strategy above as recorded in earlier plans are now an intrinsic part of the way we do things with significant milestones reached along the development path. Two still need focused work - achieving final PQASSO accreditation and the sustainable development of the outreach volunteer cadre. Nevertheless this represents significant progress to celebrate.

Good progress on the systems and policies in the Activity Centre, consolidation of the robust Finance systems, and one-third of the Database project complete, means that we shall self-test on PQASSO before the end of this year, and seek external accreditation next. Next year also, it is planned to have a particular part-time post in Outreach specifically to sustain the volunteers in parishes, to develop more broadly their commitment and capacity.

Last year following SWOT and risk analysis, we identified the recruitment needs in the Management Committee, which have now been addressed. It also highlighted the need for a more strategic approach to fundraising as recognised in the new strategic objective. This latter has begun well with developing relationships with major funders; partnerships with other dioceses; long-term legacy work; and discussions around potential new funding sources from Diocesan restricted funds.

The 'dynamic interlinking of all areas' was also called for. The work on developing the 3 'arms' of the organisation in an integrated fashion has been supported by:

- joint working during the Lourdes pilgrimage, with the social advocacy expertise used and shared with the outreach team during family assessment and funding work
- a tutor joining us as a support worker on the pilgrimage gained an insight into the very different sort of input required than that in the Centre.
- this same individual designed and ran a fundraising event in Hendon which encouraged participation by students and parishioners together. It met the social mission and exceeded the financial target
- the innovative design of the evaluation resources for the social advocacy scoping project, symbol supported and inviting choices to be made and

feelings to be expressed, is also being strongly developed in the Activities Centre courses and the outreach in general. Further training and development in this area, it is hoped, will improve our capacity for excellent communication with people with learning disabilities to the level of transformation.

Looking Forward: 2010-2012

Activities Centre Strategy

At the major planning session at the beginning of the 2009/2010 'school' year managers and staff sketched out a 3 year strategy, with the major moment in London's life, the Paralympics and Olympics, in mind. We recognised the work already done towards developing as a Centre of Excellence through course design and delivery aimed at supporting the full potential of each student. Therefore, with students evidently developing their capabilities, we felt able to plan to '**Go to the Olympics and Paralympics**':

Year 1: **Assess and evaluate** the potential of students. Develop the self-esteem and confidence of the organisation and individuals, staff and students. The theme of 'seeds' encourages this nurturing of foundation skills.

Year 2: **Make ready**. Develop the social skills, the competence to travel, the accessibility programme for students to enable them to be volunteers in the work or spectators at the events. Seek further resources – volunteers and, say, a mini-bus to enable the project

Year 3: **Participate**. Join in this iconic moment in society using developed skills and organisational capacity. We hope that our people, trained in the official Olympics volunteer programme, can work as volunteers in the games. We also hope to be able to take or support groups to enjoy this London event as spectators together with other local citizens.

Outreach and Social advocacy strategy

'**Go to the Olympics and Paralympics**' can clearly be planned as an inter-linking project within the general strategy of spiritual and social support and the context of inclusion and participation. This will be developed within the next 6 months.

D: Operational Objectives

Activities Centre

1. Support student assessment and links with homes and families by individual reports each year
2. Support the planning, delivery and evaluation of courses with appropriate staffing, resourcing and marketing. Run the Open Day and Certificate Day.
3. Within each course content, include skills development suitable for the 'Olympics' strategy.
4. Introduce ASDAN processes within our systems and start the work towards accreditation for 5-10 students in 2010/2011.
5. Continue the development and writing of courses to coherent course plans and session structures. Complete 'Enriching My Life', 'Cook and Eat', 'Horticulture', 'Music & Performance', and Music & Recording' in 2009/10.
6. Develop a joint music therapy/music and movement therapy project for families to begin 2010/11.
7. Complete the Makaton training. Introduce Makaton symbols throughout the Centre by end 2010/11.
8. Make management decisions on continuance or introduction of courses based on mission aims; student interest or needs; profit/loss profile; and building constraints. Develop the tutor role in this.
9. Identify the themes and groupings within the work (e.g. the Healthy Living cluster) to promote cross-pollination of ideas for course content and student progress. Use the groupings to both attract Funding and to promote discussion and 'blue sky' thinking with staff
10. Complete a fully-funded computer project to enhance student provision and tutor skills
11. Begin one social enterprise in year 2009/2010 – Ceramics or Horticulture
12. Work towards a social enterprise in Hospitality for the year 2012/2013 deriving from the Olympics work.
13. Ensure policies for health, security and care systems are in place, understood and adhered to.

Outreach and social advocacy

1. Continue to offer the friendship, time and commitment to individuals and families, the key characteristic of the Outreach work. It is impossible to put a time or value to this.
2. Complete the recruitment of outreach co-ordinators through the Diocese as possible. Introduce a new post for a volunteer leader as funding allows – 2010 ideally.
3. Develop new training personnel, supporters and volunteers. Plan 2 enrichment sessions each year in support.
4. Identify 2 locations for retreat week-ends and recruit families
5. Continue links with the Lourdes pilgrimage team and our pilgrims via reunions and Masses at the Cathedral.

6. Support sacramental preparation in parishes via the use of available and confident volunteers; training courses or sessions; and developing use of database and information retrieval.
7. Develop the profile-raising and attitude-changing work in schools, parish confirmation groups, UCM groups. Achieve 2 per year in each category.
8. Work with the organisers of the Inclusive Masses throughout the Diocese, and complete the work on 'Guidelines for Liturgy' in support.
9. Use the Evaluation report on 'Symbols of Faith' as a basis for expanded work on the use of symbols and the use of the course by people with learning disabilities. Obtain funding for this.
10. Continue to develop the social clubs throughout the diocese, and leave in the care of local volunteers. Introduce 2 new initiatives in 2010.
11. Within every area of service include developments (of volunteers or of interest or activities) to enable participation in the 'Olympics' strategy.
12. Work with the CLDN (Catholic Learning Disabilities Network) in partnership on a major project on innovative sacramental Preparation resources for children and adults. St. Joseph's is to manage the project on behalf of the consortium.
13. Complete the work on the Outreach Database, with professional guidance, by the end of 2010
14. Participate in the major website project to produce a discrete area accessible and inter-active with people with learning disabilities, and a discrete area for the social advocacy information and signposting. Obtain funds and operate a research project for this cutting edge proposal.
15. On completion of the scoping project, obtain funding for next stage of social advocacy for 2010 – 2012. Continue to embed in the outreach service

Operational Objectives: Operations and Funding

1. Develop further policies around health of staff and students as required by mid 2010
2. Manage the capital projects, IT, lift, emergency lighting in 2010 and 2011
3. Recruit sufficient volunteers for administration support.
4. All SMT to assist with design of database project and of website project, including analysis of software and hardware support required
5. Introduce up-graded accounting package for financial information and systems by end 2010
6. Develop one new major funder relationship each year
7. Prioritise the further development of PR and marketing tools and support in year 2010, 2011
8. Build in website support and up-date into the staffing structure
9. Meet the budget and address the targets in the Funding Plan

Financial Overview: Strategic Plan 2010 - 2012

In 2009, we spent slightly more (£410,000) than we had income in that year (£404,000) but the difference was easily absorbed by the Restricted Funds. In that year the income increased by £30,000 over the previous year, part of that growth and development in terms of activity and presence reflected, of course, in the gently increasing turnover (£313,000 - £404,000 over a 3 year period). The budget for 2010 reflects that trend.

The budget predicts income of £543,000 in year, with a large expectation on the Restricted Funds on £191,000. This includes some ambitious projects which will go ahead as funds are won. They are an intrinsic part of the strategic development so I am hopeful that funders, including Diocesan funds, will be inspired by the plans and will determine to allocate the funds. The balanced budget will be protected throughout. It is fair to say that some of the projects may take more than one budget year to reach maturity and begin, but the main funds required are shown here. Those projects referred to are:

- Social advocacy - £30,000
- Website development for accessibility for people with learning disabilities, and for use as social advocacy tool - £23,000
- Computer suite – For Activities Centre, to teach independent life skills to students, and also to train tutors and LSAs (learning support assistants) in use of computers - £27,000

Success in attaining this amount will leave the 'reserves' in the Restricted Funds in the healthy position of about £100,000.

The cost of generating funds has held steady year on year. This offers a ratio of 1:8 - that is £1 of spending raises £8 of income. For a small charity this is reasonable, although I would like to improve the major funds income. We have gained new relationships with major funders this year and will continue that work.

A major improvement has been the increase in Activities Centre fees – predicted to achieve £169,000 in 2010. However, I believe a plateau is being reached in what the present building can accommodate. Consolidation of the numbers and income, development of the quality, and achieving accreditation and external recognition will be the focus for the next 2 or 3 years. Other or additional alternatives may be explored during that period.

There is no unrestricted or fees income achieved in the Outreach service, as may be expected, although we do achieve some significant Restricted Funding, particularly for the specific projects such as the Lourdes pilgrimage. However, the basic work via employees and volunteers on the faith and sacramental life and the pastoral support of people with learning disabilities in the parishes is almost impossible to fund from outside the faith community itself. We do intend to achieve some lines of income for 'Outreach' from the innovative resources which are currently in development in partnership projects.

In overall terms, we are delighted to have been able to balance the budget in 2009 and know the task will be no easier in 2010. However, we rely on the quality of our offering, innovation in all areas, and rigorous financial systems to continue to develop and to protect the budget whilst developing the mission.

Helen O'Brien, Director

St Joseph's Pastoral Centre Summary Budget 2010

INCOME (£000)

	Total outturn 2009	Budget 2010		Budget Total 2010
		Unrestr.	Restr.	
<u>Funded Income</u>				
Diocesan contribution	123	123		123
General donations	32	35		35
Restricted Funds	65		191	191
<u>Generated Income</u>				
	16	17		17
<i>Sub Total</i>				366
<u>Earned Income</u>				
Activities Centre	160	169		169
Outreach	1	1		1
Services	7	7		7
<i>Sub Total</i>				177
TOTAL INCOMING RESOURCES	404	352	191	543

RESTRICTED FUNDS:

B/F 2010	98
Income 2010	191
Expen 2010	188
C/F 2010	101

EXPENDITURE (£000)

	Total outturn 2009	Budget 2010		Budget Total 2010
		Unrestr.	Restr.	
<u>Cost of generating funds</u>				
	42	45		45
<i>Sub Total</i>				45
<u>Cost of Charitable Activities</u>				
Activities Centre	205	189	41	
<i>Computer project</i>			27	257
Outreach	106	49	61	
<i>Social advocacy project</i>			30	
<i>Sacramental Resources</i>			2	142
Services	29	38		
<i>Website</i>			23	
<i>Database</i>			4	65
<i>Sub Total</i>				464
<u>Governance & Management</u>				
	28	31		31
<i>Sub Total</i>				31
TOTAL RESOURCES EXPENDED	410	352	188	540

Capital Budget 2010

Project description	Income	Expenditure		
	Planned source of funding	2010		
General				
Computer suite project				
Refurbishment of darkroom plus alterations to extend present computer room into single suite.	Restricted Fundraising	11,000		
New computers (6), plus touchscreens and printers (2), interactive whiteboard, and new furniture for computer suite (workstations + chairs)	Restricted Fundraising	15,500	26,500	<i>Restricted</i>
IT equipment requirements				
New Laptop and printers	Unrestricted Diocese	1,500		
New server (existing sever was installed in 2004)	Unrestricted Diocese	9,000		
New workstations (2 in 2010, 5 in 2011, 5 in 2012)	Unrestricted Diocese	1,500		
Software upgrade (MS Office, operating system)	Unrestricted Diocese	3,000		
Health & Safety				
Emergency lighting - First and ground floors	Unrestricted Diocese	3,500		
Evacuation chair	Unrestricted Diocese	1,500	20,000	<i>Diocese</i>
		<u>SUMMARY</u>	26,500	Restricted Fundraising
			<u>20,000</u>	Diocese
			<u><u>46,500</u></u>	

Financial Plan 2011 - 2012

CAPITAL

	Income	Expenditure	
	Planned source of funding	2011	2012
IT requirements			
New workstations (5 in 2011, 5 in 2012)	Diocese	4,000	4,000
Software upgrade (MS Office, operating system)	Diocese	3,000	
Lift and Health & Safety			
Lift - Full door sensors	Diocese	2,000	
Lift - Essential tests and new ropes	Diocese	3,000	
TOTALS		12,000	4,000

REVENUE

by SOFA head

Cost of generating funds

'Steady state'	Diocese	47,000	50,000
----------------	---------	--------	--------

Activities Centre

'Steady state'	Fees & fundraising	240,000	249,500
<i>Accessibility Project</i>	<i>Restricted funds</i>	<i>2,000</i>	<i>2,000</i>

Outreach

'Steady state'	Diocese & fundraising	111,000	114,000
<i>Lourdes</i>	<i>Fundraising</i>		<i>30,000</i>
<i>Social advocacy</i>	<i>Restricted funds</i>	<i>32,000</i>	<i>34,000</i>
<i>Community work towards Olympics</i>	<i>Fundraising</i>	<i>5,000</i>	<i>5,000</i>

Information & Services

'Steady state'	Diocese & fundraising	40,000	42,000
<i>Database</i>	<i>Diocese & fundraising</i>	<i>4,000</i>	<i>4,000</i>
<i>Website</i>	<i>Restricted funds</i>	<i>10,000</i>	<i>10,000</i>

Governance & Management

'Steady state'	Diocese	33,000	35,000
----------------	---------	--------	--------

TOTALS

524,000

575,500