



**ST JOSEPH'S
PASTORAL CENTRE**
working with people with learning difficulties

Strategic Plan

St. Joseph's Pastoral Centre

2008 – 2010



Introduction

This is the third of the Strategic Plans in this form and the increased numbers and focus of our operational objectives deriving from our strategic objectives reflect the growing impact of St. Joseph's. As we build our activity and choices both in the Centre and in Outreach; as we train and form staff and volunteers, old and new; as we join in various types of events around the Diocese, and indeed abroad in Lourdes - so the recognition of what we have to offer grows and the call for our support increases. We recognise, nevertheless, that many areas of the Diocese remain untouched – and we address that in this Plan.

This growth needs careful management, since the need is probably without end. The nurturing of our staff and volunteers and the celebration of achievements 'along the way' is as important a strategy as any, if we are to avoid the feeling that the load is too heavy. An important feature of the Plan is that we can measure our efforts, celebrate achievements and have permission to stop when the plan is done.

In financial terms we did not spend quite as planned because of slippage of some projects – caused partly by the loss of the Activity Centre Manager. These projects, in general, have reached the stage of identifying first steps, and remain for future years. Consequently the project funding was not sought so the budget remains balanced. On-going costs remained constrained and the strain points identified in the last plan – around Fundraising and Administrative support to the Director did indeed take their toll. It is hoped that those costs may be supported via the Diocesan grant in 2008.

The Aims of the Strategic Plan

- To respect in our work the long-term strategic objectives
- To create a realistic and achievable action plan, with specific timed operational objectives, which derives logically from the vision and strategic objectives,
- To underpin the action plan with a financial plan, with a budget for 2008.
- To address the sources for the necessary finances in a related Fundraising Plan

Content of the document

1. Introduction
2. Review of the year 2006-2007
3. Mission, Aims, Values and Strategic Objectives
4. Operational Objectives, Supporting Operational Objectives
5. Budget – Revenue and Capital Expenditure: Income

Review of year 2006 – 2007

Outreach

'In daily faithfulness to God and man, you continue to be and represent a real asset for your parish communities. You are one of the most promising signs with which the Lord endlessly comforts and surprises us.' From Cardinal Hummes' Message to Catechists, Oct.07

As part of that growth mentioned above, is the growth in people – volunteers and staff – who are trained and interested in the work. This means that we need to find ways of developing and using these committed people, and of recording and monitoring their progress. These systems are being developed.

We also have a growing number of material resources available to us, e.g. our two new courses and our models of liturgy, including those from Lourdes. We will ensure that we use these materials well so as to be able to support new areas with minimal work. Nevertheless, we continue to identify opportunities or gaps in our resources in the Outreach objectives 15 -23.

In all of this, we build on an extremely successful and enjoyable year. Of the 16 Operational objectives we have fully completed 14 – including the delivery of the two courses to 65 volunteers and taking 60 pilgrims to Lourdes. This latter stretched our capacity but was an enriching and wonderful experience for all, and made us many new friends in the Diocese. We were particularly delighted with the support and engagement of many young RedCaps. One disappointment was that after an encouraging start, Sr. Patricia Lenihan had to withdraw from the SPRED programme due to responsibilities to her Congregation. It is also true to say that, personal links aside, there is no real partnership working with the Agency for Evangelisation.

Induction and support of 3 new Outreach co-ordinators has called for support from the Director and other colleagues and our generous volunteers. The task has been enjoyable and rewarding.

Activity Centre

The Activity Centre is characterised by a person-centred method of planning and delivery underpinned by student choice. We aim to enable students, many of whom have complex needs and challenging behaviour, to reach their full potential, whether that be emotional security and enhanced communication capacity via therapy or leisure courses, and/or vocational learning towards some form of employment. The implications of this inform the objectives for the Plan.

This past year has seen a major input in developing the understanding of the staff around student assessment and the development of each course. This has been accompanied by a review of hours and working practices and variations of contracts as appropriate. The staff is now using the themed approach and the new planning and evaluation systems to good effect. An innovative course being delivered by the Southwark team is a valuable addition to our offering.

All this has been in the context of the unexpected loss of the Activity Centre Manager and the consequent call on our Assistant Manager and the team, and the Director, to sustain and develop the work short-handed. I should like to thank Sylvia Edwards and all the staff and volunteers for achieving both those aims with skill and commitment. A re-structuring for the management team is planned and is being explored with potential partners, but is as yet incomplete and urgent.

We achieved 4 of the objectives and developed comprehensively around that vocational area discussed above. The information project is now in view and will begin in 2008, whilst the improvement in communications with staff and volunteers has, so far, only been via regular staff meetings. We will roll-over that aim to 2008 and 2009.

Operations and Support

The 10 Operational objectives (C) on profile have been met in full, except for some slippage on the on-going website project. The systems support, in Finance, Management systems and H&S are now good, and we have started work on the Database. The refurbishments and safety work are on track for completion and the Centre looks both welcoming and professional.

Some new Fundraising ventures are looking promising and, despite a Fundraiser vacancy for a period, we are confident of starting 2008 in a good financial position. On the governance side, we welcome Fr. Allen Morris to the Management Committee with a particular remit around liturgy and catechesis. Some work on the Committee is yet to be done.

I thank everyone who has contributed to the development of this document, and all our staff and volunteers for their work in 2007. I commend it to the Pastoral Board for their support, whilst, as ever, welcoming critique and suggestions.

Helen O'Brien, Director

1 November 2007

Mission

To support individuals with learning difficulties, their families and friends.

Aims

We aim to fulfil our mission by:

- **Helping to educate society and to transform attitudes, enabling people with learning difficulties to achieve their potential**
- **Working in partnership with other organisations in the field and with people of all faiths or none, enhancing activities and services**
- **Integrating children and adults of faith with learning difficulties into full participation in the life of the Church**
- **Offering training and formation to people throughout the Diocese of Westminster, so that they may support people with learning difficulties**

Values

Our values underpin all that we do. They are:

- Respect** - for the gifts and dignity of each individual
- Love** - expressed in warm care and long-term commitment
- Community** - a welcome which creates friendship and belonging
- Spirituality** - nurtured by that creativity and joy in activity which lifts the spirit

Strategic Objective A

Find and reach out to people with learning difficulties in our parishes and offer appropriate spiritual and social support and advocacy

- Locate the people with learning disabilities in the area of the Diocese of Westminster and evaluate their needs
- Sustain and develop the present volunteers; use them in the work and recruit more as appropriate – especially by location
- Develop the mapping and monitoring of the work, so as to record and evaluate outcomes and impact as well as inputs and outputs
- Develop the database so as to be able to answer strategic and tactical questions
- Develop the expertise and knowledge base for social advocacy
- Develop the use of symbols and accessible communication in our work
- Create occasions for support and celebration

Strategic Objective B

Develop quality services in the Activity Centre at Hendon which aim to enable adults and children with learning difficulties to reach their full potential

- Ensure that the delivery of the courses is person-centred, offering choice, participation and development to suit the individual.
- Ensure that our services embody in their content and in the way they are delivered, the spirit and values of St. Joseph's.
- Continue to develop new courses -vocational, recreational and therapies- to meet the needs of individuals and also to be successful in the financial and commissioning environment
- Continue to develop the systems for monitoring, evaluation, and risk assessment.
- Promote the Centre as model, organisational base and springboard for innovation and outreach

Strategic Objective C

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

- Work towards quality assurance via PQASSO.
- Develop and sustain cutting-edge communication, evaluation and fund-raising tools
- Engage the Diocesan agencies, clergy, and laity in the loving support of and the work with people with learning difficulties
- Develop alliances and partnerships for the purpose of the sharing of expertise and the building of presence and influence. Include church, charity and local government sectors
- Work to provide or enable the provision of accessible catechetical and evangelising materials for general parish use.
- Ensure that we honour the dignity and rights of people with learning difficulties whilst, at the same time, we recognise and benefit from their giftedness. Sustain that principle in the methods of our working practices.

Operational Objectives A - Outreach

People, profile and presence

1. Continue the training and development of the 3 new Co-ordinators. Recruit +1 into West London for end 2008.
2. Catechetical advisor in place until Summer 2008; recruit new personnel for end 2008.
3. Continue the spiritual enrichment and development of volunteers Develop identified volunteer into training role for delivery of courses
4. Take a group of young people to the Bright Lights SPEC week-end, July 2008
5. Take a group of families to Lourdes in July 2009
6. Consider taking a group to World Youth Day in 2010
7. Run two respite week-ends in Hampstead per year 2008, 2009, 2010
8. Celebrate St Joseph's Day in March 2008
9. May 2008 to be Inclusive Mass month for parish groups – workshops to precede
10. Have a Fun Day for families at Hendon and invite funders in September 2008
11. Hold an Inclusive Mass in the Cathedral in November 2008 and in 2010
12. Continue to be a 'listening presence' to our families when in need or distress.
13. Continue Saturday social clubs and develop one new group each in Hertfordshire and East London in 2008. Re-use current 'taster' model if possible.
14. Continue sacramental preparations from referrals and as a result of presence in parishes: use also as training/consolidation experience for newly trained catechists

Sacramental preparation

15. From the successful 'Symbols of Faith' course, develop discrete workshops (e.g. First Eucharist for mainstream catechists; Inclusive Mass workshop) for flexible use with small groups.
16. Continue to deliver the 'Symbols of Faith' course depending on strategic location or parish request. Amend and develop the materials as appropriate (e.g. with new graphics for course members with learning disabilities)
17. Complete the full evaluation of the S of F course, to include sustained learning by course members, and consider it for accreditation or use by other Dioceses

Social Advocacy

18. Continue to deliver and amend the 'Living Signs' course as appropriate.
19. Develop it as a person-centred planning training tool for Activity Centre volunteers and staff
20. Develop a social advocacy project and associated bid for funds. To include scoping and research of need; signposting capacity; website; telephone: and practical support. 2008 for set up. 2009 through 2010 development and continuation

Other material and models for use

21. Write and promulgate material for faith-sharing groups including people with learning disabilities in collaboration with YCW. Devise a method for dissemination and support of the groups. 2008 and 2009
22. Construct 'Guidelines for Inclusive Liturgy' with group to include Fr. Allen Morris, new management committee member. 2008
23. Develop sacramental preparation materials for use by children with special needs, in partnership with Southwark. 2008 and 2009. Consider marketing 2010

Evaluation of the service, for quality and fund-raising purposes

24. Enhance the Mapping and Monitoring system to include the planned development of our volunteers and course location planning. Embed the system into mature practice
25. Contribute to database project (see Objectives C)

Operational Objectives B – Activity Centre

Personnel

1. Appoint an appropriate management team to sustain the new learning and person-centred priorities – by March 08 at latest
2. Evaluate current NVQ training for its usefulness and impact; 2008
3. Develop training plan around course delivery (content) and practice (techniques for pwld) – including Makaton . Consider partnership with Southwark CEC 2008
4. Continue training around planning, evaluation and student assessment systems. Develop partnership with Pield Heath House special school for exchange of professional practice
5. Continue spiritual support of staff via the Chaplain, and also new links with PP at Our Lady of Dolours

Quality of programme, student provision and systems

6. Continue to promote and make real the values of St. Joseph's – including an awareness of care staff practice and student demeanour and comfort. Follow-up any issues as appropriate.
7. Embed and develop the present Evaluation systems, fully in use from September 2007, throughout 2008 and 2009
8. Introduce an opportunity for student assessment feedback in summer term with students, Homes and carers in 2008
9. Create appropriate and confidential management systems; develop the Database into a monitoring and strategic tool. Take part in PQASSO accreditation work 2008/2009
10. Run an Open Day in each of the years 2008, 2009, 2010
11. Use Certificate Day 2008 as an opportunity to invite funders. Use as presentation of innovative work and courses. Recognise staff training achievements as well as students'
12. Continue to provide social opportunities at events at Hendon; develop visits into the community through 2008 - 2010 (at least 2 per year)
13. Input into Social Advocacy project (see Objectives A) with needs of students and their families in mind
14. Develop 2 new courses in 2008/2009 (Computers and Drama). Seek partnerships.
15. Design and run the Bishops' Conference funded Accessibility project

Finances and Funding

16. Follow through with Lottery Bid potential funding for 'Healthy people: Healthy communities'. Apply elsewhere if unsuccessful
17. Create new project bid built around 'Creativity and Expression' to cover other current courses.
18. Develop bid with Diocese for use of strip of land on Hendon estate for development of Horticulture – including organic vegetables and sensory garden
19. Continue to monitor the market's response to new fees structure – monitor the debts and meet with Local Council commissioners and Home Managers as appropriate
20. Sustain the full break-even position planned to be achieved in 2008, for 2009 and 2010
21. Develop the outlets for sale and display of students' work
22. Assist the development of links with sponsors, funders and major donors (see Operational Objectives) by development of clear mission-led course plans and student targets, which will inspire and enthuse our supporters.

Strategic links and partnerships

23. Continue the work of links with local charities and Council bodies
24. Continue research into potential Centre model elsewhere (Hillingdon?) in 2009

Operational Objectives C- Profile and presence

Communications

1. Complete the first stage of the website project by early 2008
 - a. Develop its use for the social advocacy project, 2008 and 2009.
 - b. Use for fundraising and donations. Include 'JustGiving' facility, agency collection, e.g. Christmas Cards, and donations via WorldPay. Ensure appropriate links with RCDOW site. 2008.
 - c. Evaluate its accessibility and link with work on new 'Communications' programme (Widgit graphics) via special pages for readers with learning disabilities, 2009
 - d. Consider email response or interactive messaging, 2010
2. Produce 2 Newsletters per year.
3. Produce an Annual Review each year

Partnerships and Profile

Some profile aims are met under Objectives A (4-11 inclusive)q.v.

4. Director to continue to use ACEVO membership for links with charity field
5. Continue membership of National Learning Disability Advisors Group
6. Membership of Diocesan Personnel Group
7. Underpin development of Outreach school links by Director becoming Foundation Governor of Diocesan Secondary School
8. Participation in Bishops' Conference and other National events as appropriate
9. Attend Deanery sessions, or meetings with individual PPs with Outreach Co-ordinators as appropriate

Supporting Operational Objectives

Governance and Management

1. Recruit new management committee members up to strength. Enhance role of each individual
2. Continue to develop appraisal system. Second round of target setting for senior staff to include formal review of performance of duty. First round of target setting for second-tier of staff.
3. Train managers and supervisors in appraisal
4. Continue management, H&S and job skills training as appropriate. Create over-arching training plan 2008/2009 and obtain funding
5. Obtain funding for and run a Database project, with the aim of creating a strategic, effective and robust tool. 2008 and 2009
6. Develop links with Finance Office and Property Division to support the mature St. Joseph's systems. Consider best methods for cash systems, monitoring income and payments and cash collection via website.

Buildings, Facilities, Administration and finance

7. Design, fund and deliver a project around catering and Healthy Living 2008/2009. Consider supported employment in this area and as cleaner.
8. Continue to develop the systems in Reception. Include the potential for supported employment
9. Explore the potential for a volunteer, volunteer manager

Fundraising, PR and Events

10. Operate the Funding Plan and enhance the scope and type of funders
11. Work with the new Diocesan Fundraising post-holder and exchange ideas and prospects, including a legacy programme
12. Run at least one funders party in 2008 around the Certificate Day
13. Operate the new Christmas Cards scheme and consider one new website driven area
14. Develop new types of events, including those with solely fundraising purpose e.g. a concert and a new sponsored event
15. Appraise the Brent Cross charity collection and consider again for 2008 -2010
16. Approach an identified individual for % working in Fundraising
17. Develop the links with St. Gregory's and one other secondary school
18. Have a website launch party in 2008

St Joseph's Pastoral Centre

Budget for 2008 *(Final version as at 4th April '08)*

Form 5 (2008)

Incoming Resources: Revenue budget		<i>Budget 2007</i> <i>(Unrestricted & Restricted)</i>	<i>Actual 2007</i> <i>(Unrestricted & Restricted)</i>	Unrestricted 2008	Restricted 2008	TOTAL 2008
General						
Diocesan income		101,700	98,725	118,500		118,500
Diocesan income <i>(extraordinary item)</i>			3,525			
General Income (excl. events and grants from Trusts etc.)	Donations	5,500	1,728	2,000		2,000
	Gift Aid (incl. tax rebate)	4,000	1,902	1,200		1,200
	Legacy income		10,000			
	Sundry income	100	234	100		100
Trusts, Grants and Community Fund		52,000	29,800	40,000	111,843	154,943
Interest on Restricted Funds			3,138		3,100	
Total general income		163,300	149,052	161,800	114,943	276,743
Activities in furtherance of Charitable objectives						
Activities Centre	Activities Centre	126,000	138,602	121,000		121,000
Outreach to Communities in the Diocese <i>(including provision of formation courses & materials)</i>	Outreach	76,528	54,589			
	Sale of course books & materials	400	432	750		750
Information & Services	Catering income	5,200	5,325	5,200		5,200
	Catering Project	3,000	0			
	Website / Information Services	6,000	0			
Total activities in furtherance of Charitable objectives		217,128	198,948	126,950	0	126,950
Activities for generating funds						
Events	Fundraising income	8,000	10,150	9,000		9,000
	Choir	1,000	2,043	1,500		1,500
Lettings	Lettings	2,000	2,199	2,500		2,500
Total of activities for generating funds		11,000	14,392	13,000	0	13,000
Resources Generated in Year		Total	391,428	362,392	301,750	114,943
Restricted Funds balances b/f - 1st Jan '08		Total	67,496		92,822	92,822
TOTAL FUND RESOURCES		Grand Total	458,924	450,105	301,750	207,765

St Joseph's Pastoral Centre

Budget for 2008 *(Final version as at 4th April '08)*

Form 5 (2008)

Resources Expended: Revenue Budget

Costs of generating funds

Fundraising & Publicity

Salaries & related costs

Increased staff capacity

Staff Advertising

Publicity (Annual Review/Newsletter)

Website

Fundraising expenses

Volunteers' expenses

Travel

Training

Overhead apportionment of
Admin, Building & Facilities
(8%)

Total of Fundraising & Publicity

Sub Total

Events and Lettings

Salaries & related costs

Volunteers' expenses

Training

Travel

Fundraising expenses

Choir

Overhead apportionment of
Admin, Building & Facilities
(8%)

Total of Events & Lettings

Sub Total

Total costs of generating funds

Total

<i>Budget 2007</i> <small>(Unrestricted & Restricted)</small>	<i>Actual 2007</i> <small>(Unrestricted & Restricted)</small>	Unrestricted 2008	Restricted 2008	TOTAL 2008
19,020	14,921	21,607		21,607
	1,181			
5,000	2,333	3,000		3,000
		3,000		3,000
800	355	400		400
100	0	100		100
150	0	100		100
500	269	500		500
6,225	6,096	6,251		6,251
31,795	25,155	34,958		34,958
1,343	1,486	2,047		2,047
150	0	50		50
1,300	664	700		700
100	0			
6,225	6,096	6,251		6,251
9,118	8,246	9,048		9,048
40,914	33,401	44,006		44,006

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Form 5 (2008)

Charitable expenditure		Budget 2007 <i>(Unrestricted & Restricted)</i>	Actual 2007 <i>(Unrestricted & Restricted)</i>	Unrestricted 2008	Restricted 2008	TOTAL 2008
Costs of furtherance of charitable objectives						
Activities Centre	Salaries & related costs	115,560	95,632	68,941	40,688	109,629
	Sessional Staff	23,440	26,160	26,540		26,540
	Art Materials	3,000	4,103	3,200		3,200
	Training	1,000	289	1,000		1,000
	Volunteers' expenses	1,500	1,538	1,500		1,500
	Staff Advertising	0	700	800		800
	<i>New projects</i>	24,000	0		5,350	5,350
	<i>Certificate day '07</i>				3,000	3,000
	Bad debt provision (2007)		3,000			
	Overhead apportionment of Admin, Building & Facilities (50%)	38,907	36,100	39,069		39,069
Total of Activities Centre	Sub Total	207,407	167,522	141,050	49,038	190,088
Outreach to Communities in the Diocese <i>(including provision of formation courses & materials)</i>	Salaries & related costs	63,950	60,110	35,653	35,000	70,653
	Staff recruitment	250	203	700		700
	Outreach Expenses & Materials	1,700	1,426	1,200		1,200
	Staff Training	1,200	55	1,000		1,000
	Volunteers' expenses	100	0	100		100
	Travel	900	789	700		700
	Formation courses and materials	3,450	3,980	250		250
	<i>New projects</i>	4,500	3,971			
	<i>Cathedral Mass (Nov '08)</i>				5,000	5,000
	<i>Brights lights (July '08)</i>	30,000	14,179		4,000	4,000
	Overhead apportionment of Admin, Building & Facilities (15%)	11,672	11,430	11,721		11,721
Total of Outreach to Communities in Diocese	Sub Total	117,722	96,143	51,324	44,000	95,324
Information & Services	Salaries & related costs	13,123	13,095	13,464		13,464
	Catering supplies	6,000	5,980	6,200		6,200
	Training	300	0	300		300
	Travel					
	Volunteers' expenses	300	149	600		600
	<i>New projects</i>	12,350	0		13,350	13,350
	Overhead apportionment of Admin, Building & Facilities (10%)	7,781	7,620	7,814		7,814
Total of Information & Services	Sub Total	39,854	26,844	28,378	13,350	41,728
Total costs of furtherance of charitable objectives		364,983	290,509	220,752	106,388	327,140

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Form 5 (2008)

		<i>Budget 2007</i> <i>(Unrestricted & Restricted)</i>	<i>Actual 2007</i> <i>(Unrestricted & Restricted)</i>	Unrestricted 2008	Restricted 2008	TOTAL 2008
Support costs						
Governance & Management	Salaries & related costs	22,864	22,827	19,209		19,209
	<i>Increased staff capacity / salary awards</i>			10,000		10,000
	Travel	150	0	150		150
	Training	600	161	600		600
	Legal fees		3,525			
	Overhead apportionment of Admin, Building & Facilities (9%)	7,003	6,860	7,033		7,033
	Overhead apportionment of central IT maint. costs	2,250	0			
Total of Governance & Management	Sub Total	32,867	33,373	36,992		36,992
Total Charitable Expenditure	Total	397,850	323,882	257,745	106,388	364,133
TOTAL RESOURCES EXPENDED	Grand Total	438,764	357,283	301,750	106,388	408,138
Less TOTAL FUND RESOURCES	Grand Total	458,924	450,105	301,750	207,765	509,515
Net FUNDS as at 31st December 2008	Grand Total	20,159	92,822	0	101,377	101,377

RESTRICTED FUNDS

B/F bal at 1st January '08	92,822
<u>add</u> Income received	
	Activity Centre 47,643
	Outreach 54,200
	Information & Services 10,000
	Interest (est.) 3,100
	Sub-Total <u>207,765</u>
<u>less</u> Expenditure	
	Activity Centre 49,038
	Outreach 44,000
	Information & Services 13,350
	Sub-Total <u>106,388</u>
C/F bal at 31st December '08	<u>101,377</u>

St Joseph's Pastoral Centre
Budget for 2008 *(Final version as at 4th April '08)*

Form 5 (2008)

Administration, Building & Facilities

ALL AMOUNTS BELOW HAVE BEEN APPORTIONED ACROSS DEPARTMENTS ON PREVIOUS SHEETS(*shown as Overhead apportionment*)

	Salaries & related costs	29,189	
	Travel	200	
	Vols expenses	1,500	
	Training	500	
	Adminstration	12,550	
	Premises & Utilities	21,700	
	Depreciation - Fixtures & Fittings		
	Depreciation - Office Equipment	2,500	
	Depreciation - Func. Properties	10,000	
<i>Total of Administration, Building & Facilities</i>	<i>Total</i>	78,139	78,139

Capital Budget 2008

Project description

	Planned Source of funding	Unrestricted	Restricted
Refurbishment of darkroom to extend present computer room	Lottery Community Fund		5,000
New computers (2), plus touchscreens and printer	Lottery Community Fund		3,400
Disability access - front door and loop system	Diocese	2,500	
Completion of emergency lighting (<i>in addition to 2007 approved amount</i>),	Diocese	1,500	
TOTAL		4,000	8,400