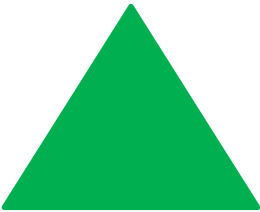


Organisation name Carers Plus Yorkshire (Scarborough & Ryedale Carers Resource)	
Grant Details: Total Grant: £79,634 Amount funded to date: £79,634 Amount remaining: £0 Start date: 1 January 2019 End date: 31 December 2021 Date of Report: 9 February 2022	
Grant Summary Scarborough and Ryedale Carers Resource provide free, confidential and independent information, advice and emotional support to unpaid carers of children/adults who have physical/learning disabilities; long/short term life limiting illness; mental health problems, or need support due to the effects of substance misuse or age. The grant will provide the opportunity to explore new, sustainable funding pathways and realistic external partnerships/collaborations. It will provide additional hours for the core strategic team to explore/secure future developments, consistent with the organisation's long-term strategic goals. In addition, increased management time would be used to produce the charity's first sustainability plan to include strategic and operational development, marketing and funding plans. carersplus.net	

1. What is the first expected key achievement?			
Establish and embed the role of Development Manager within the organisation - this role is a new and emerging post with wider reaching responsibilities including: <ul style="list-style-type: none"> • Taking a holistic view of the organisation – considering its development to date, and exploring its future potential • Developing our new 5-year plan for the organisation - working to include realistic funding and marketing plan that broadens the scope of the organisation and its income generation (2020 – 2025) • Consolidating existing opportunities and exploring new partnerships 			
Measures for this achievement	Target date	Progress towards these measures	
1a. DM Post established - role to be developed with the support of	October 2018	Year three - and what an incredible transformation of the role and the difference made to the business. The Trustees and the CEO saw the development of the role as vital to the charity's survival both in terms of funding and positioning of the organisation - as such the BDM (Business development	

	<p>the Triangle Trust.</p> <p>Development and Definition of post purpose defined with TT</p> <p>‘Targets’ and milestones confirmed for the post holder through supervision and appraisal</p> <p>Decision on TT and the initial development of a 3-year plan for the postholder in terms of sustainability of post after funding support. TT to share contacts to start networking and considering experiences of other TT funded projects (including their success through social enterprise)</p>		<p>Manager) now carries the title of Deputy CEO. This has not been about the promotion of a single person - this has been about the value the role and the difference a post positioned with the senior management infrastructure can make.</p> <p>The role now holds the brief to lead:</p> <ul style="list-style-type: none"> • Marketing and Communications • Partnership Developments • Service Oversight • Funding and sustainability • Deputising for the CEO <p>As the Charity has developed over the last 3 years we have come to a position of understanding that we are running a business as well as a charity; for the CEO this was a lonely realisation and the post of having a deputy shares the overwhelming responsibility felt at the top.</p> <p>As this report will share, we have become exceptionally well regarded for being a generous leader over the last 3 years and as such are approached for much more work and consultation with VCSE colleagues/peers, statutory and health care partners. Being mindful of our business needs is important in these conversations without losing the heart and essence of the Charity and our core purpose.</p> <p>Our work and scope of the resulting role has helped to ensure we are positioned well and seen by others as proactive and a force for good. Now often referred to as a ‘Generous Leader’, our position within the VCSE network is strongly regarded; the CEO and Deputy CEO are often used as reference points and consulted with; seen as keen to support others to be strong.</p> <p>Whilst Triangle Trust support funding has now ceased - the role is truly embedded into the fabric of the organisation - valued by all (especially the Trustees and the staff team) and accounted for as a priority in our future business planning.</p> <p>The postholder has never been held to discrete targets around business continuity or funding, as the charity believe targets are ‘owned’ and shared by the whole team, however KPI’s are an important motivator for this post and the senior team as a whole. KPI’s are set within the business plan and personally through supervision. Supervisions for the postholder are used to push ideas forward and develop an understanding of how current developments are performing. We have developed a significant level of trust between the postholder and the CEO - no wrong door (only learning opportunities) in terms of the developments we choose to explore for the Charity.</p>
1b.	5-year plan drafted and	October 2019	The development of the 5-year plan was seen as a critical document in 2019-2020 - written to span 2020-2025 it was approved by the board and published ready for the

<p>ready for Board approval. New organisational plan to support the organisation's development through 2020-2025. Plan to include operational plans for marketing, funding, sustainability of services</p>		<p>commencement of a new financial year. This Business Plan coincided with the 25th Anniversary of the Charity and was due to be launched with the celebration of our inclusion in the Parliamentary Review. Just the mention of our inclusion in the Parliamentary Review offers an indication of the level of investment we have made to push the organisation forward and ensure we are celebrating the importance of our work. In terms of intent, this is much more about ensuring 'unpaid carers' are recognised for their true value and worth, than it is about the organisation per se.</p> <p>The Business Plan was written in plain English - strategic in nature setting out our ambitions - building on our strengths and sending a clear signal to all stakeholders our values and intentions (see attached).</p> <p>However.....</p> <p>Soon after publishing we issued an addendum to ensure all partners were clear about our COVID support for carers and the wider community (Q1 of 2020/2021). Recognising the Business Plan was designed to have longevity - it was published with a folder in the back (for those created physically) to allow for additions and addendums to be added and yet the document kept all together. Its electronic presence was built on the same premise.</p> <p>A further complication with the Business came shortly after this first addendum. In September 2020 SRCR was approached to consider a merger with a partner site in Hambleton and Richmondshire. We firmly believe the stability and leadership capacity/competency now evident within our organisation, gave North Yorkshire County Council the confidence to approach us and ask us to consider supporting a less developed Carers Centre. Over the course of the following 12 months (to June 2021) the CEO and Deputy CEO dedicated significant time to working initially through the 'merger process' and latterly through the closure of the minor partner to allow for novation of contracts and the takeover by SRCR. This unexpected turn of course affected our Business Plan trajectory - the Trustees asked for the suspension of our 5-year plan and the issuing of an interim one-year plan 2021-2022 to ensure all stakeholders were clear about the changing landscape and business model now to be adopted by the organisation (attached).</p> <p>The clarity and solid foundations of our organisation's strategic position has been developed from the 'time investment' afforded by the Triangle Trust. This post (the postholder) and the capacity it has afforded the CEO, has demonstrably given us the where-with-all to strategically work on the 'merger' and maintain a strong organisation whilst doing it.</p> <p>We are presently in the process of re-writing our 5-year plan. The new business plan will now run from 2022 – 2027. The</p>
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			<p>CEO has felt empowered and now has the time to write this plan. This is a significant strategic change in her capacity to do this critical job for the organisation. It has been a privilege to see both roles grow as a consequence of the funding. We will forward a copy of the 2022-2027 plan as soon as it is completed and ratified by the Board of Trustees.</p>
1c.	<p>Training and development – Identification of training opportunities for Development Manager to explore social enterprise - Information to be shared with trustee board. Support internal staff to develop skills to write successful funding applications and small grant applications. (Supported upskilling of internal team)</p>	<p>January 2019 onwards</p>	<p>Growth of the internal team, both immediately within the Senior Management Team and within the operational team has changed unrecognisably over the last 3 years. This has been a carefully planned process but one which has followed the successful skill development of the Executive Team (as now defined). The CEO, the DCEO and the Finance Manager have worked together to carefully build the foundations of:</p> <ul style="list-style-type: none"> • A stronger and more diverse funding base (to strengthen the Carer core) • A more adaptive and dynamic community reach - widening our geography to do more carer work over a wider footprint, as well as broadening the scope of our work by securing ‘like-minded’ and complementary contracts that add to our charitable objectives (not weaken or dilute) • A stronger staff team – as we look to take them on our ever-changing journey of success. We have worked hard to support the staff team to manage this change and to retain the ethos/culture of the organisation as we grow beyond our original expectations. • A sustainable offer to carers (and vulnerable adults) across a significant geography in NY – whilst expansion may not have been our original intention – our strength, strategic acumen and delivery quality has been developed as a result of Triangle Trust making the right investment at the right time. • A reliable, trusted and generous partner for colleagues within the statutory, health and VCSE sector <p>Developments consolidated over the last 3 years have helped the team to not only grow as a whole but made the individual service teams think more entrepreneurially for themselves. In line with the ambitions of the funding grant, individual teams work closely with their Service Manager to consider and apply for small grants promoted through Carers Trust (nationally) and local charitable organisations/foundations. In addition, the teams have developed in their confidence and success of securing donations from local employers and community groups. The Development Manager has helped build this confidence by co-writing, offering a critical eye on writing/applications and offering guidance on creativity, focus on ‘answering the question’ and being realistic with outcomes/expectations.</p> <p>The Service Manager has been supported to draft larger applications, often in partnership with the DM, but this has started to spread the responsibility of income generation and</p>

			sustainability of the team/activity. This is a building area of work - the staff team are developing a greater sense of ownership of the work now they are more fully engaged in the developing, writing, implementing and reporting of new services/projects. This has not necessarily reduced the workload of the SMT, however it has bought the service team closer to the whole process and has helped to develop a greater understanding and appreciation of the complexities of sustainable service provision.
2. What is the second expected key achievement?			
Establishing Scarborough and Ryedale Carers Resource as a well-known centre of excellence. Known by service users and partners as an organisation successful in providing positive solutions and high-quality services.			
Measures for this achievement		Target date	Progress towards these measures
2a.	<p>Ensuring robust and consistent messages emanate from all staff and media communication.</p> <p>All service' poster to be established - adding clarity to our core provision internally and externally.</p> <p>Messages to be used consistently and activities/funding applications to be consistent</p> <p>Annual media plan drafted</p> <p>Plan of action confirmed with internal team regarding co-ordinated contact with GP surgeries</p>	April 2019	<p>What amazing learning a merger has been learning and development of skills of the Executive and Senior team has been exponential - and without the DM (and the ensuing fund success) we would not have had the capacity to even attempt this service acquisition. Having joined forces and taken the decision to adopt a new name the challenges of ensuring our profile and confidence in our organisation remained high, required careful and consistent messaging coming from the organisation.</p> <p>We were fortunate to draw upon the skills of a Board Trustee (who owns a design and marketing organisation), to advise us throughout the process. The team were determined to ensure the new branding was confidently co-ordinated and translated to all stakeholders; the DM was able to write (for the first time) a Communications and Marketing plan that contained branding guidelines, and internal protocols for consistent application of our message and 'look'. We have recognised the importance of streamlining the interpretation/translation of messages through fewer hands, and as such we have assigned a marketing and communications role to one of our talented administration staff. This staff member has now been promoted to 'Business Support' as we have seen the value not only in her flare to support this, but also in focusing on message delivery to the external world.</p> <p>Our Communication and Marketing Plan gives us focus, clarity and an opportunity to review progress. It reminds us what we are striving to achieve and helps us to differentiate our approaches and messages according to market audience.</p> <p>Carers Plus Yorkshire was launched in Carers Week June 2021 - we approached this pivotal moment with absolute confidence and determination. Our messages and image have been strong from the moment of launch. We have worked hard to ensure new materials were disseminated across School, Healthcare places, public spaces and into carers</p>

			<p>homes. Our plan saw an overnight saturation of print, radio and TV and social media.</p> <p>The last 7 months has been spent ‘shouting from the rooftops’ – at all levels. Talking about the strengths of the ‘new’ brand/organisation and in our newer geographies, unexpectedly having to establish a new presence. We have been surprised at the quick shift and recognition of the new name/organisation - we believe this is testament to our planning and preparation for the change - and the ‘covering of all bases’ attention to detail in our communications. The investment of time and energy has been significant, but has resulted in a seamless transition and in many aspects an increase in ‘noticeability’.</p> <p>Our work with the Healthcare sector has been building over the last 3 years – we initially targeted our communication work to improve connectivity with GP’s - whilst this has been an important driver, we could not have predicted the impact of the pandemic and the significant changes in the healthcare infrastructure/management and its relationship with the VCSE. We have worked hard to ensure we are positively contributing to transition conversations as GP’s developed into larger PCN’s (Primary Care Networks); and latterly how CCG’s and ICS’s have formed and developed new relationships with interested partners (including Carers Plus Yorkshire).</p> <p>Undoubtedly our organisation has benefitted from the ‘strategic thinking space’ afforded by Triangle’s investment, allowing us to position ourselves appropriately - demonstrating our agility and insightfulness in how to work in genuine partnerships; often leading to the development of meaningful collaborations.</p> <p>Our work with the healthcare sector has proved helpful in terms of business development but it has also broadened our ability to advocate for the voice of carers within the patient journey, enabled us to identify hidden carers, and almost certainly lead to solid, well-integrated contractual opportunities.</p> <p>In terms of printed communications this year, we have re-launched everything with the new branding - this includes a new website, new social media platforms, a quarterly newsletter and a more targeted approach to sending the right message to the right audiences. We have, through our Business Support postholder, streamlined all communications through one/two staff members - this does not act as a gatekeeper/controller, but more as a quality assurance measure that has allowed our communications are ‘on-message’ and brand appropriate.</p>
2b.	Strong relationship with NYCC provision	April 2019	New partnerships are plentiful – relationships with PCN’s are stronger, Hospital teams now understand our work and value.

<p>demonstrating integration of service - Living Well and Stronger Communities</p> <p>Over the next 3 years - work with a minimum of 3 organisations per year to develop a stronger, strategic working relationship across services - this may include partnership working and joint bidding. Year one: Age UK / Sitting Services / Schools</p>		<p>We have strengthened relationships, developed equality at tables and entered operating collaborations with (exampled by):</p> <ul style="list-style-type: none"> • Tees Esk and Wear Valley NHS Trust - holding contracts now to develop their carer networks • Humber Teaching NHS foundation Trust - holding contracts to support their NHS volunteering, their Patient and Carer Participation Groups • South Tees NHS Foundation Trust – introducing our Carers Champion training and supporting their carer journey developments <p>But our work has also strengthened with VCSE partners - especially demonstrated in Hambleton & Richmondshire, our new contract area. We have invested time in getting to know colleagues, understanding their business ambitions and exploring their potential to work with us in a mutually beneficial way.</p> <p>New VCSE partnerships include:</p> <ul style="list-style-type: none"> • POSCH - parents of children with special and hidden needs • Hambleton Community Action - developing shared carer groups, establishing a Local Leaders group together, and nurturing a working relationship that includes joint bidding • Leyburn Arts Centre - operating with them out of a shared location to deliver outreach services to carers within familiar surrounding for them. <p>Our approach, now confident enough, has been to work as a 'generous leader' - entering conversations and actions not for what we can achieve financially but for how we can gain greater reach and impact for our primary audience.</p> <p>We have ensured our staff team has been exposed to the impact collaborative working can have; many have shadowed and been given structured training on how to develop and mature working partnerships. The staff team are more confident to support our partnership work and have built a network of proven providers they regularly work with to enhance our offer.</p> <p>Covid has strengthened our relationship with the Local and District Authorities. Securing COVID related contracts has added significantly to our organisation and our 'equal' relationship with the authorities on the ground. The emerging recovery of communities has become a solid feature within our portfolio as a result of work and intelligence built over the last 2 years. In terms of bringing networks, communities and partners together, Carers Plus is now seen as a 'go-to' provider – often used in a consultative capacity (as proven by the recent commission of North Yorkshire Carers Service - we were consulted on the specification briefing, recommended detail for service inclusion, and asked to facilitate carer-voice sessions). Being held with this level of regard by the local</p>
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			<p>authority and other strategic partners, is incredibly important to our sustainability. In many respects we have learnt a lot over a 3-5 year period – especially the importance of looking further ahead than we were previously. The make-up of the organisation has changed - our thinking about the senior team and their roles, has changed – our leadership and management has grown, changing for the better, embedding new values and operating practices that empower internally and externally.</p>
2c.	<p>Create a regular carers network meeting between the key contributing organisations. Establish current landscape for networking opportunities and discuss potential for collaborative network of VCSE providers (and relevant statutory providers)</p> <p>Have established a network meeting of interested providers; meeting 2 x per annum. Consider this in partnerships with others to potentially build on existing networking opportunity.</p>	July 2019	<p>This year has been all about the development of Carers Plus Yorkshire in every sense - it has been about redefining our culture, our ambition and our purpose with existing and new audiences - including positioning ourselves in mutually beneficial networks that give us an opportunity to place carers 'front and centre' either strategically and/or operationally.</p> <p>Over the full 3 year period, our presence at meaningful networks has allowed us to become known for being proactive, driven, and determined to look for the 'carer dimension' in appropriate agendas. Very often we have been able to raise the profile of the agenda where it may have been hidden:</p> <ul style="list-style-type: none"> • in Business Networks (eg the B2B and various Rotary Clubs, the Freemasons, Lions Clubs), • in Health Partnerships (the CCG's, Patient and Carers Groups, NHS collaboratives, Mental Health Forums, PCN development networks) • in School networks (where we have been focused on promoting our Ambassadors programme and our Schools Charter) • in the VCSE circuit (Hambleton and Richmondshire Leaders Network, Community Networks, VCSE Alliance, Volunteering Networks). <p>Our perception of being part of networks has changed over the last 3 years:</p> <ul style="list-style-type: none"> • COVID has driven the success and purpose of networking harder than ever before. At a time when we couldn't physically travel; the virtual networking world has made it easier and faster to make impact with partners over large distances. It has accelerated us being able to 'getting to know each other' and build strong bonds, across areas, in extremely difficult times. • There are generous gains from being at the table - we have been able to see the larger benefits of 'influencing' not always taking from networking opportunities • We have had increased notoriety from being at network tables – our name, our dynamic approach, our fundamentally important offer has resulted in us being invited to networks and tables that have proved important to our business development and expansion plans. This notoriety within the Healthcare sector has been especially important in raising the profile of carers across many Trusts operating across our footprint.

			<p>If we had been asked 3-5 years ago if we had the time to invest in networks at the current level, the answer would have been NO. It has taken the investment of this post to add capacity enough to build successful outcomes from networking. Now comfortably recognised by the Board of Trustees as one of the pivotal features of our current standing within the North Yorkshire marketplace.</p>
2d.	<p>Add capacity and strength to the management of the organisation and its future sustainability. Development of the role such that it is embedded and supportive of the current leadership team - adding capacity to the role of the Chief Officer in relation to local strategic partnerships.</p> <p>Plan and evidence of direct core funding being secured to ensure the post of Development Manager is self-sustaining beyond March 2022</p>	<p>On-going</p> <p>April 2021</p>	<p>The impact of the post (and the capacity it has afforded the CEO), has been transformational - it has changed the dynamics within the senior management team, the wider business structure, and our operating portfolio. It has been a fast paced, an exponential learning curve, and a leap of faith at times for the CEO and the Trustees.</p> <p>The organisation has proved its 'metal' in terms of offering the postholder her head, to be bold with new ventures and work alongside the CEO in a trusted and respectful partnership that means representation of the organisation at strategic tables is shared.</p> <p>The CEO/Trustees have operated as the postholder's checks and balances - but the belief in their measured risk taking (something new for the organisation) has placed our Charity at the heart of the wider VCSE sector, and built us a reputation of being a progressive, innovative, and agile Carers service with a solid framework for longevity.</p> <p>The Trustees have committed to investing in its leadership team as a whole - including the development post (and we feel the value they place upon us). This has been a significant business decision but has been one that has already proved its success - extending this into the future is not under question. Our 'affordability' as a leadership team is embedded in all funding applications, and is built into negotiations with funders who are increasingly appreciative of the need to have strong infrastructure behind our operations.</p> <p>The business (and we now see ourselves as a Charity with essential business acumen) has had to become smarter at fund management, planning and forecasting. Our Finance Manager (now with a financial assistant) has a more complex and diverse funding base to manage - a purposeful manoeuvre to ensure we have multiple funding sources and a reduction on our dependency on Local Authority funding. Together as an executive team, the CEO, Development Manager and Finance Manager work closely each quarter to track our financial position, and ensure the changing picture of income/expenditure, new grants and 'free reserves' are used or built appropriately.</p>

3. What is the third expected key achievement?

Through the capacity created - explore and develop realistic and sustainable options for the organisation – including:

- relationships/links with the local corporate community;
- ensure our relationship with the Local Authority is well balanced and maintained
- broadening the scope of funders;
- exploring costed services and other options to even the % and current reliance on grants and contracts (notwithstanding the importance and benefit of holding these).

Measures for this achievement		Target date	Progress towards these measures
3a.	Confidence in the service to either extend our core contract or ensure we are in a strong position to secure a tender for core services (Adult and Young Carers)	July 2019	<p>Our success this year with a number of new grants and funding applications has built a wide portfolio of Carer and non-carer services within the organisation. Our primary ambition in the first half of the year was to prepare for the geographical expansion into Hambleton and Richmondshire - recognising that the core contract due for novation was not sufficient to deliver a quality experience for carers in the area. So our energies focused on the building of grants that would allow us to recruit more Carer Adviser time at the point of takeover. This was successful and we now have a strong team in all areas we cover.</p> <p>Our ability to be confident in our staff team, our capacity to cover all geographies, and our quality of service has been critical this year as we approached a major tender in September 2021. Looking at the run up to the tender being issued, the Local Authority had been supportive of our takeover plans, had included us in the development of the specification for the new tender, and asked us to arrange carer focus groups so they could consult with carers prior to the tender being issued. As a result, when the tender was announced we felt, the Local Authority had listened and it reflected a lot of our influence.</p> <p>The tendering process was a significant learning curve for all of us. The CEO had previously experienced competing within a tender for carers services, but the pressure remained high on both the CEO and Development Manager as the lead writers. The Trustees were behind us and allocated support funds for a 'Tender Management' consultant to work with us as required.</p> <p>Our approach was to draft our application before sharing with the consultant - this allowed us to write from the heart - to include everything we wanted and build the picture as we saw it. When the draft/wording was offered to the consultant, he was able to quickly 'tenderise' the writing. The final submission felt a very different style of writing to our usual applications - but it helped us understand how to write factually, answering the question and being very direct. We are confident in our submission and will hear by the middle of February. With the impact of the Triangle Trust funding, we can confidently say we felt tender ready - our organisation is in the strongest position it has ever</p>

			<p>been - it is highly respected and integral to health and social care services in North Yorkshire. The tender will be assessed on an 80/20% split - 80% quality/ 20% price - we feel our application demonstrated the quality North Yorkshire will be looking for.</p>
3b.	<p>Currently we hold 3 contracts in partnership. Looking to increase and to hold</p> <p>4 by 2019 5 by 2020 6 by 2021</p> <p>To be reviewed and work to be focus on retaining partnerships thereafter</p>	April 2021	<p>Partnerships are at the heart of our success. We have learnt a lot over the last 3-5 years. Operating in genuine partnership is quite challenging; we believe we are successful in partnership by ensuring our approach is mutually respectful, with clear expectations and objectives. Our partnerships are reviewed regularly with our partners - offering the chance to openly discuss how they are meeting needs and adjusting arrangements if necessary.</p> <p>New partnerships this year include:</p> <ul style="list-style-type: none"> • The Freemasons • Hull Clinical Commissioning Group • Humber Teaching NHS Trust • Tees Esk and Wear Valley NHS Trust • Help for Health Partnership (East Riding) • Humber Coast and Vale Partnership • The Armed Forces Covenant Fund - and First Light Trust • The Scarborough Rotary Club • Ryedale District Council • Scarborough Borough Council <p>But our relationships/partnerships with previously reported organisations have not stood still - we pride ourselves on maturing partnerships, extending them and reviewing them continually. We believe our ability to maintain and build on funded and unfunded collaborations has contributed to our current standing within the provider marketplace.</p> <p>Our openness to consider each potential partnership for its 'fit' and appropriateness for the charity has led to new avenues being introduced within our offer. We have learnt to make informed choices for the charity - not simply following funding or partnerships for the sake of it (or when asked - flattering though this may be), but exploring each opportunity that could positively add to the carer experience/journey.</p> <p>One of the key successes of our partnership working has to be the increased awareness and understanding of unpaid carers across North Yorkshire. Whilst the network of partnerships and collaborations have helped to build a strong and sustainable organisation for ourselves, we have had the opportunity to influence each and every partner to better understand the part they play in supporting carers as well as helping us to further our vision and mission.</p>

3c.	Maintain current capacity over the next 5 years. Closing the funding gap:	April 2019 by 2,700 April 2020 by 28,000 April 2021 by 100,500 April 2022 by 121,000	<p>With our current thinking and planning on the sustainability of the organisation, we have never been more confident of our direction. Our new business plan (2022-2027) is in draft and is built on a strong set of values, ambitions and a core vision that we are all passionate to work towards. With a number of quality marks achieved in 2021, we recognise our performance and quality is high, our partnerships plentiful and our strategic positioning strong. We are keen to see the tender secured but feel confident in the survival of the organisation either way. We obviously want to win the tender and continue to be the provider of choice for the Local Authority, BUT we firmly believe the charity has a strong and broad base from which to re-build should we lose our core commission (including independent carers services). In terms of income, the delivery of the core carer services accounts for 35% of our income at present, but this has a value beyond its £ worth as we believe it gives us the credibility and base on which to pull in the remaining 65%.</p> <p>In working through the funding strategy for the future, we have a 5-year forecast that is constantly reviewed by the Executive team and Trustees. The projections at present show a healthy number of contracts stretching into the future and therefore we have lessened the 'cliff-edge' and replaced it with a number of service specific pressures we will need to address. The plan at present means we have built in time to review and plan to secure funding service by service when needed.</p> <p>We believe in the 3 years supported by Triangle Trust we have been able to build a stable position for the Charity whereby the hand-to-mouth existence has moved from 12-18months to 3-4years. In this regard we have 'closed the funding gap' previously anticipated in 2019 when we began, and have created space for the Senior Team to run the Charity rather than fight fires.</p> <p>We have become very clear in our financial forecasting and in our management of the reserves. In our funding applications we are now confident to explain our financial position, with a transparency around our reserves policy and the free reserves available to the business. It has been important to broadened the senior management team's understanding of the accounts and the financial positioning of the organisation (previously something the CEO and Finance Manager would have managed in isolation); the sharing of this intelligence has helped the senior team better understand how the organisation's make-up is shaped, and how their profiling and management of individual projects/services can contribute to financial pressure points/savings in the business.</p>
3.d	Support from internal team on	April 2019	As noted in previous answers, the postholder has been able to upskill and support managers (and others) to

	<p>securing future funding. Commencement of side-by-side support for internal members of the team identifying pots of funding - support with bid / grant writing to maintain activity levels.</p>		<p>contribute to the writing of applications - we have built a strong portfolio of previous applications (successful or otherwise) that now work as a reference bank for all. We have learnt that we do not need to start from scratch for each application, and that the work we write is often able to be used to apply to different funders.</p> <p>The team have grown in their understanding of the actual cost of services and how the infrastructure of the organisation is afforded. This knowledge has resulted in a more careful use of resources, and a greater success rate in acquiring support from external sources.</p> <p>The team are now more alert to funding opportunities, and have the confidence to ask, bring forward and secure funding. There is an obvious proudness when this happens that is amazing to see.</p>
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4. Optional – please detail any additional expected achievements you would like us to know about.

Our ambition will be to maintain current staffing levels over the coming years - this will be a measurable achievement of the development work of the post holder. Our intention is to retain the skills and expertise of our staff team wherever possible.

Our staffing structure has significantly changed over the last 3 years. We have added new services, new geographies and grown as an organisation beyond the vision we originally had in 2019. The confidence of the organisation to absorb and embrace these changes has to be attributed to the developing strength of the senior management team.

The organisation in 2019 had a CEO and Finance Manager (supported by the Board). When Triangle Trust offered support, the team was added to with the Development Manager's post. As the team grew (through successful positioning and funding acquisition) the Senior Team has grown to include: 2 x Service Managers and a Quality Improvement Lead. This level of management support is now essential to run the breadth of services and appropriately support a growing staff team.

Without question, we have a strong team - with 37 staff (a mix of part-time and full-time), more than anticipated in 2019. Our challenge now will be to manage the end dates for each project/service line, targeting our fundraising strategy to meet the needs of the services as they approach their conclusion. We recognise that some services will come and go (and we have to be realistic about this in terms of specific funding) but we have worked hard to define which services are essential to our core delivery, and therefore which will need timely intervention to ensure security moving forward.

The cost of having a strong management team is now built into each application we make - we have been unable to identify sufficient funders to solely meet these costs (sadly) but their/our role is pivotal to the success of the organisation so must be met through project applications. We have been able to develop a costing model that builds in a tolerable % of management and overhead costs to cover some of the core costs and where possible accrue underspends from grant funding to bridge the gap.

We would like to maximise the impact of our anniversary year - including a proactive programme of external events, new partnerships and messages to celebrate our 25th anniversary in 2020.

COVID over ran our 25th and our 25th+1 years - however the anniversary has now passed and in many respects was rightfully overshadowed by the takeover and the launching of Carers Plus Yorkshire. We are now looking forward and awaiting a celebration of securing the new tender and another 3 years of delivering outstanding services to carers. This years Carers Week will mark a cause for celebration if the contract is secure, the Queen's jubilee and our CEO's 21st year with the organisation.

5. If you specified in your Expected Key Achievements document that there would be additional income generated as a result of the grant please include the final income figures (including all income sources e.g. trading, contract grants etc.)

	Start date of year	Total additional income		
		Expected at start of grant	Reforecast	Received to date
Year 1	Apr 2018	£ -	£	£
Year 2	Apr 2019	£ 2,491	£2,492	£2,491
Year 3	Apr 2020	£ 10,060	£13,043	£13,043
Year 4 (if required)	Apr 2021	£ 22,279	£21,172	£5,000

Please provide an explanation for these figures and how they relate to your income and expenditure forecast.

The figures in the table above are unchanged from last year. We thought it more useful to present a narrative of the financial situation.

At the start of the funding period the turnover of the organisation was approx. £½ million with a funding gap of approx. £100K. This felt very uncomfortable, and it was through careful management by the Trustees and the work of the CEO/BDM on securing new funding, partnerships and contracts, that the gap was successfully filled. In the subsequent years, turnover has grown hugely, as demonstrated in the graph below.

Due to the nature of our funding – a mixture of contracts and shorter-term project funding, there will always be moments when we need to focus efforts on one service or another, and inevitably there will be times when the funding position feels uncomfortable, but we have demonstrated internally we have the skills and agility to overcome this - and certainly more adept at working on this sooner rather than later.

The role of the BDM and the Finance Officer continues to be to manage this rolling programme and to ensure replacement or new funding is found before the old one finishes.

As mentioned elsewhere in this report, the takeover of Hambleton and Richmondshire Carers Centre took place in July 2021. This has contributed to the increase in our overall income by £200K from existing contracts in the area. It has also provided the opportunity to look for funding in a different geographical area that has already proved fruitful and led to an increase of service provision in that area.

The first draft of the 2022-23 budget we are showing a deficit of £53K. Though the overall income is standing at £1.15 million. This demonstrates a smaller percentage gap, that we are confident will be filled as the year progresses - especially now we have a track record of meeting a target like this. We will continue to look for new funding to both sustain and develop the organisation in all the areas of North Yorkshire that we cover.

6. Did any aspect of the grant delivery not progress as expected and were any subsequent changes made?

We could not have predicted in 2019 that the development of the Senior Management Team and the organisation would have grown in the way we have. If we look at overall turnover we have now reached the £1m mark – whilst this sounds like the organisation would now be of sufficient size and security to move forward on its own accord, we have learnt that more income simply means more out goings and does not automatically mean more surpluses/reserves. The Trustees have been exceptionally strategic in their investment of free reserves back into the business – holding 3 months operating costs in restricted reserves and a running free reserve of approximately 50k at any one time.

In 2022 we are determined to tackle our work with the business community. With the takeover/tenders/developing a ‘one-team’ culture from two, and COVID, we have not achieved our ambitions to break into a corporate landscape. Our ambition in 2022 will be to finally identify time to focus on this aspect of the business.

The postholder’s personal ambition over the 3 years has been to allow the CEO to be a CEO - to give her the time and capacity to take the organisation forward strategically - the current position of the Charity is proof this have been achieved.

7. Has the grant achieved the expected results overall or did anything need to change?

We have achieved more than we anticipated and certainly more than we hoped in the last 3 years. Winning the tender in February 2022 will be the icing on the cake.

8. What are the future plans for the development funded by this grant? (include details of any further funds secured to continue the work)

We have not secured any specific funds to pay for the Development Managers post - however the funds identified for this post are not at risk and have been built into 2022/2023 budgets. In our current predictions on this coming financial year we will be setting a deficit budget of only 53K which includes all service and management costs.

9. Is there anything you have not included elsewhere in the report that you feel we should know? E.g. you might have some wider reflections about the impact of the grant overall both within your organisation and beyond.

We have lots of developments and successes we could share at this point but our overwhelming comment in this final report is simply to thank the Triangle Trust for their belief and investment in the organisation. The post has made a significant difference in our future security, in the confidence of the CEO and her team, in the range and scope of our services, and in the respect of strategic and operational partners. As an organisation we now know what we need to do and how to reach it.

We are committed in the following 24 months to:

- Consolidating one team and ensuring we have consistent practice across all of our geographies
- Identifying funds that support the core infrastructure of the organisation
- Maintain core services at risk of losing funding in the next 12 months (namely the Young Adult Carers Service)
- Identify funding to support known gaps (including Mental Health support for Carers)
- Built back better our outreach provision

- Develop a portfolio of corporate partners.

Thank you for pointing us in the right direction!

10. Please email us a copy of your latest annual report and full accounts independently examined by a qualified accountant covering the last 12 months (if you have not already sent them).

Date this form was completed

Claire Robinson: 07/07/2022

Thank you for providing this feedback. Please return this completed form by email to info@triangletrust.org.uk