

# Stuart Low Trust Business Plan 2019-2023

## 1.0 Executive Summary

1.1 This business plan sets out the direction of the Stuart Low Trust over the next 3 years to ensure that it continues to fulfil its mission; to ensure that local people, especially those experiencing social isolation or mental distress, have access to the support they need for better health and wellbeing. In February 2018, SLT's Board agreed an ambitious 3 year plan. In addition to maintaining the frequency and high quality of SLT's present activities, 4 key areas will be the focus for the next few years:

(1) To bring in activities for younger people via feasibility studies so that services can be provided that will attract this population.

(2) To increase Saturday Project workshops to 52 weeks a year. SLT has already made some headway here with 28 Saturdays provided last year.

(3) To develop, in partnership, a volunteer befriending service, so that participants can be supported outside of activity times.

(4) Once the befriending service is set up, to endeavour to link in more closely to GP's and health professionals so that more vulnerable residents can be reached.

1.2 This increase in the frequency of current services and the development of new services will require additional resources to deliver. Over the next three years SLT will need to double its turnover in order to expand its service offer. This will be achieved by the recruitment of a part time fundraiser. In order to assist manage the expansion in the organisation's activities, an Operations Manager will also be recruited to plan, set up, implement, manage and report on the new services, whilst overseeing the present ones.

1.3. The key milestones and outcomes by which the Business Plan will be assessed and judged are set out in section 11.

## **2.0 Introduction**

2.1 Stuart Low Trust is a lifeline which brings people living with or recovering from mental health issues together, via it's out of hour's activities. SLT provides safe, non-judgemental environments that combat social isolation and build confidence, mental well-being, social skills, opportunities for volunteering and a sense of belonging. All are welcome. With only 3 part time staff, its activities are supported by 55 robust volunteers, who give over 4,000 hours per annum. The State of Equalities Report 2018, produced by Islington Council, purports that an estimated 3,774 Islington residents are living with a serious mental illness; and that 17,878 Islington residents are living with depression (the highest numbers in London). The suicide rate, particularly amongst younger men, is higher than the national average.

## **3.0 Mission and Values**

3.1 SLT's Mission is to ensure that local people, especially those experiencing social isolation or mental distress, have access to the support they need for better health and wellbeing. Our core values are Inclusive; Welcoming and friendly; providing encouragement, support and opportunity; A culture of volunteering; Effective and efficient and Working with local partners.

## **4.0 Regulation and Governance**

4.1 Stuart Low Trust (SLT) is a registered charity (1102325) and a limited company (5001948), incorporated on 22/12/2003. It operates in Islington. Governance is undertaken by a Board of 9 trustees, to whom the CEO reports regularly. SLT Trustees wish to recruit a participant to the Board so that this perspective and input can inform future services. Stuart Low Trust is bound by Charity Commission regulation and Company Law. It chose to sign up to the Fundraising Regulator and works within the parameters of the Healthy London Workplace Charter. The Trustees have considered the Charity Commission's guidance on public benefit including the guidance on fee charging.

4.2 The Stuart Low Trust relies on grants, donations and fees for all our activities. The fees are set at a level that does not prevent those on low incomes using our services. Most of our activities are offered free of charge. The Trustees have complied with the duty in section 4 of the Charities act 2006 to have due regard to public benefit guidance published by the commission. The trustees examine risk and apply the risk management model recommended by the Charity Commission.

4.3 The Board want to involve Participants more in the governance and management of the organisation. To this end, SLT intends to target the recruitment of a trustee who has experience of being a Participant of SLT's services.

## **5.0 Partnerships and Awards**

5.1 Stuart Low Trust has built successful partnerships and funding arrangements with Islington Council, the British Medical Journal, the Estorick Gallery, St Mary's Church, Culpeper Garden, Cripplegate Foundation, Islington Museum, Claremont and others. SLT's high points include recognition of the Queen's Award for Volunteering in 2015 and receiving the Healthy London Workplace Charter in 2017, both of which demonstrate high standards and good practice with volunteers.

## **6.0 Volunteering Programme**

6.1 As a small, local charity, SLT relies heavily on its committed volunteers. SLT has 55 volunteers who contribute over 4000 hours each year to enable the organisation achieve its mission. SLT's volunteering programme continues to attract robust, supportive and motivated volunteers and we have seen an increase in the number of participants who wish to volunteer. During 2017/18 SLT received funding for a project to enrich the lives of vulnerable Islington residents, 22 of which volunteered and participated in 4 bespoke training sessions, supervision and support. Of these, four went on to produce a CV, supported by iWork, Islington Council's employment coaches. One succeeded in finding employment. The project included a Volunteer Coordinator. We are pleased with the outcome and now seek further funding to continue this work. One attendee said, " I appreciate all the opportunities that SLT makes available for volunteers and feel that I have learnt a lot and had a lot of benefit from my involvement with SLT: thank you".

## 7.0 Current Services

### 7.1 Friday Evening Events

“Uplifting joyfulness”, said one participant. Taking place 52 weeks a year, SLT’s Friday Evening Events promote mental wellbeing by bringing people together in an easily accessed, enjoyable and non-threatening environment with simple nutritious food, informative and entertaining presentations and opportunities to socialise and volunteer. Between 60 - 100 people attend regularly or just drop in.

Presentations included Finding your way through distressing beliefs; Human Rights and Mental Health; Art therapy as a coping mechanism and How to boost your confidence. Performances/other topics included Sing along with the Jukes; Nature’s orchestra; A history of Soho and Roman London. A participant said, “Wonderful, beyond words”.

### 7.2 Saturday Projects

“Totally absorbing through whole session – feeling a good result immediately”, said one participant. SLT ran 28 Saturday Project workshops in 2017/18 , with an average attendance of 26. The Saturday Projects comprise 3 strands, which enable participants by providing a ‘tool kit’ of coping strategies and techniques that can be used at home (e.g. a calming effect when feeling anxious). These are:

- (1) Social skills, speaking out, assertiveness, singing, confidence boosting and getting back to work.
- (2) Increasing mental wellbeing through gentle activity, e.g. chi kung, mindfulness, aromatherapy massage self-help tips, visualisation and relaxation.
- (3) Expression when words are hard to voice, e.g. creative writing, drama, dance, arts and crafts, comedy.

### 7.3 Sunday Philosophy

SLT’s Philosophy Forum, launched in 2011, runs during term time and is led by volunteers under the expert guidance of two Philosophy lecturers. It is a unique opportunity for experienced philosophers and participants to come together and

explore ideas in a safe environment. Participants can choose to take part in discussions or just listen. Light refreshments are shared in the break. One piece of feedback was, "Made my brain hurt but I got so much out of it".

#### 7.4 Art workshops in partnership with Estorick Gallery

During 2017/18 SLT provided 8 art workshops in partnership with the Estorick Gallery. Each workshop focused on a particular theme and participants engaged in opportunities to work with different mediums. SLT wishes to increase the frequency of the art workshops to 24 per annum. One comment was, "Worthwhile, fun, enjoyable and stimulating".

#### 7.5 Tuesday evening Choir

"Singing lifts your spirit and exercises the lungs", said one participant. SLT's experienced Choir tutor brought her warm, encouraging style and more challenging pieces of music were tackled. The Choir performed at Islington Assembly Hall, SLT's Friday evening event and Culpeper Garden. 16-20 participants attend each week and they hold the Choir in high regard.

#### 7.6 Gardening

SLT's Gardening Club brings together a diverse group of local people and encourages sharing in the cultivation of plants in a beautiful environment. Tea and snacks are available, so that gardening is as much a social occasion as a horticultural one. The garden brings holiday feelings of peacefulness and tranquillity. A participant commented, "I feel like I am in Cornwall".

#### 7.7 Outings and Narrow Boat Day Trips

In 2017/18 SLT's Outings included a tour of Arsenal Emirates Stadium; Golders Hill Park; Songs in the Garden and 2 Temple Place. Up to 20 participants enjoy each outing with socialising over tea, as well as learning about a new place. Outings are free. One participant commented, "Very welcoming social gathering".

Up to 12 people attended each of the 3 Narrow Boat Day Trips on 'Angel 2'. They paid a £15 fee to cover hire costs and lunch. SLT seeks funds to cover this.

Participants are encouraged to help prepare lunch, have a go at steering the boat and tackling the locks. One participant said, “I enjoyed the lovely scenery and helping out with the boat”.

## 7.8 SLT’s Impact – Research and Evaluation

The Board approved a new, annual, evaluation tool which participants across all SLT activities will complete during the spring of 2018. This will result in an annual snapshot, from participant’s viewpoints, on how they feel SLT is doing and what SLT may need to change, do more of, less of etc. It will help inform SLT’s future work and development.

## 8.0 Finances and Funding

8.1 Income and expenditure for 2017/18 were £111,109 and £110,829 respectively. Year-end actual income was £128,703 and expenditure £109,170. We have delivered more activities than expected but kept a very tight control on costs. SLT trustees intend to designate the surplus; which came about due to exceptional fundraising efforts from British Medical Journal and Macquarie Infrastructure Team; towards new services.

8.2 In 2017/18, SLT received £42,925 from grant making trusts and corporates. Individual donations totalled £11,177, amounting to 9% of income. Coffee morning and Afternoon Tea events raised £2,692 including Gift Aid. Sponsored events raised £2,577 including Gift Aid. Waitrose Community Matters tokens raised a total of £4,294 via 17 of their stores.

8.3 Over the next three years SLT will need to double its turnover in order to expand its service offer. This will be achieved by employing a part-time fundraiser. Income will need to increase by £78k in 2019/20; £92k in 2020/21 and £107k in 2021/22.

8.4 Appendix 1 details income and expenditure plans for 2019- 2023

## 9.0 Future Plans

9.1 At an away day in February 2018, SLT's Board of Trustees agreed that in addition to maintaining the frequency and high quality of SLT's present activities, 4 key areas will be the focus for the next few years:

9.2 To identify and provide activities that will attract younger people aged 25 – 45. The late Stuart Low was 27 when he killed himself after searching in vain for appropriate help. There are still not enough choices for people in this age group to find help and support. Men, in particular, in Islington have a higher than average suicide rate. SLT will start by undertaking a feasibility study with a University to identify which activities would attract the differing populations within this age group (e.g. single mothers, students, young professionals), and how best to communicate that.

9.3 To increase the frequency of SLT's popular Saturday Projects to 52 weeks a year. SLT has already made some headway here, with 28 Saturday sessions taking place in 2017/18. To increase the frequency of SLT's art workshops, in partnership with the Estorick Gallery.

9.4 To set up a befriending service, in partnership with another likeminded charity so that SLT's participants are supported through the week, outside of activity times, if they wish to be. The befriending service may also attract new people to start attending SLT activities. The volunteer befrienders could also lead some of SLT's outings, building further rapport, companionship and trust with SLT participants.

9.5 Once SLT's befriending service is up and running, to then link in more closely with GP's and health professionals so that they can refer vulnerable adults to the service. We hope this will be a way of attracting more hard to reach participants. SLT will also look at whether the befriending may have an impact on hospital appointments/admissions.

## 10.0 How we get there

10.1 The recruitment of an Operations Manager (28 hours per week), to plan, set up, implement, manage and report on the new services, whilst overseeing the present ones. Reporting to the CEO, the proposed Operations Manager will work with a University to set up a feasibility study to identify the proposed younger person's services, set them up, ensure adequate resources, manage them and design an evaluation for reporting. They will set up a partnership with an identified charity, with support from the CEO, and bring in a new volunteer befriending service, write appropriate policies, including lone working and personal and professional boundaries, undergo risk assessments, undertake recruitment and supervision of volunteers specifically for the befriending, design and deliver bespoke training plus produce an evaluation tool for reporting.

10.2 The Operations Manager will increase the frequency of the Saturday Project (52 weeks a year) and Estorick Gallery workshops (24 weeks a year), setting up regular supervision meetings with groups of trainers. Once the befriending service is in place, with the CEO, they will procure close professional relationships with GP's and health professionals and attend appropriate meetings so that GP's can refer in to the service, plus design some research and present a report demonstrating the impact the befriending service has on hospital appointments and admissions. The Operations Manager will be appropriately qualified, have proven skills that demonstrate they can fulfil the functions of the role, e.g. excellent organisational ability, plus have significant management know how and experience.

10.2 The recruitment of a Fundraiser (14 hours per week) to bring in at least £65,000 plus their own salary in the first year. The proposed fundraiser will assist the CEO by raising the necessary funds with which to deliver the new services (in addition to maintaining present services). The fundraiser will have significant proven success in writing 3-5 year funding applications and securing substantial corporate fundraising support. They will also have experience of managing community fundraising events including local festivals, coffee morning sales and sponsored runs/cycle rides.

10.3 It is SLT's intention to form partnerships with likeminded organisations, e.g. for SLT's proposed befriending service. We have already identified and undertaken initial discussions with a prospective partner, whose services include an elderly person's befriending project. Partnership working will ensure that a wider population is reached through the complementary expertise that both partners will bring.

10.4 In order to increase the frequency of current services and provide the new services, the Board are proposing a restructure of current staffing arrangements. Part of this proposal is to dissolve the present role of Development Manager and

replace it with the new senior post of Operations Manager (as outlined above). With its present staffing structure, SLT would be unable to achieve successful provision of the new services as agreed at the Away Day in February 2018.

Present SLT Staffing Structure:

<b>Job Title</b>	<b>Hours per week</b>
Chief Executive	28
Development Officer	14
Volunteer Coordinator	12
Bookkeeper	4

Proposed SLT Staffing Structure:

<b>Job Title</b>	<b>Hours</b>
Chief Executive	28
Operations Manager	28
Fundraiser	14
Volunteer Coordinator	12
Bookkeeper	4

## **11.0 Outcomes**

11.1 At the end of the 3 year plan, the Board would wish to see the following outcomes. These are the outcomes by which we will assess the success of the plan.

Achievement of new, bespoke services for younger people in the evenings or weekends (Increasing as follows: One new service over 26 evenings or weekends in 2019/20; service increases to 39 evenings or weekends in 2020/21; service increases to 52 evenings or weekends on 2021/22)

Achievement of new Befriending Service, in partnership with identified charity (Increasing as follows: to match 10 volunteer befrienders to 10 isolated adults in 2019/20; to match 30 volunteer befrienders to 30 isolated adults in 2020/21; to match 50 volunteer befrienders to 50 isolated adults on 2021/22)

GP's/ health professionals directly referring to SLT new Befriending Service

Friday Evening Event 52 weeks a year

Saturday Project from 28 weeks to 52 weeks a year (including a summer school).  
(Increasing as follows: 42 weeks in 2019/20 and 52 weeks in 2020/21)

Sunday Philosophy Forum 30 weeks a year (term time only)

Tuesday Art workshops in partnership with Estorick Gallery from 10 to 24 weeks a year (Increasing as follows: 14 workshops in 2019/20; 19 workshops in 2020/21; 24 workshops in 2021/22)

Tuesday evening Choir 30 weeks a year (term time only) with occasional performances

Thursday gardening club – from March to November each year

Monthly outings to galleries, museums, gardens and other places of interest

Two or three narrow boat day trips per year (between May and October)

### **Appendix 1. Financial Projections 2019 – 2023.**

<b>Baseline Projection Estimates</b>	<b>2018/19</b>	<b>2019/20</b>	<b>2020/21</b>	<b>2021/22</b>	<b>2022/23</b>	<b>(As we are now)</b>
Income	105,530	108,695	112,239	115,606	119,074	3% infl uplift
Expenditure	105,146	108,462	112,006	115,373	118,841	3% infl uplift
Reserves	52,765	54,347	56,119	57,803	59,537	
<b>Surplus/deficit</b>	<b>384</b>	<b>233</b>	<b>233</b>	<b>233</b>	<b>233</b>	

<b>Projections New services</b>	<b>2018/19</b>	<b>2019/20</b>	<b>2020/21</b>	<b>2021/22</b>	<b>2022/23</b>
Baseline + new services Income	122,250	174,545	192,089	210,806	214,274
Baseline + new services expenditure	129,866	174,312	191,856	210,573	214,041
Reserves	61,125	73,772	96,044	105,403	107,139
<b>Surplus/deficit</b>	<b>-7,616</b>	<b>233</b>	<b>233</b>	<b>233</b>	<b>233</b>

#### **Income Notes 2019 -2023:**

2019/20 Fundraiser to raise own salary +£65k. 2020/21 Fundraiser to raise own salary + £78k.  
2021/22 Fundraiser to raise own salary + £93k. 2022/23 Fundraiser to raise own salary +£93k.

**Expenditure Notes 2018/19:**

£129,866 includes restructuring costs approx £6-7K; 7 extra Saturday workshops, bringing total to 35 Saturday's; Fundraiser Dec-March salary £4720; Operations Manager salary Dec-March approx £10k; plus £10k befriending service set up (includes contract partnership working, new policies; identifying and finalising training and supervision, publicity, plus preparation for the service to start). (Project costs have been calculated via present SLT Saturday Project costs and guidance from other charities).

**Expenditure Notes 2019/20:**

£174,312 includes 7 extra Saturday workshops bringing total to 42 Saturday's; Fundraiser salary £14k for 14 hours a week (£30k pro rata); Operations Manager salary £27k for 28 hours per week (£30k pro rata); £11,700 start younger person's service (26 sessions, includes venue, facilitators, equipment, refreshments, publicity, administration costs); and £10k befriending service (to match 10 volunteer befrienders with 10 isolated people with mental ill health). (Project costs have been calculated via present SLT Saturday Project costs and guidance from other charities).

**Expenditure Notes 2020/21:**

£191,856 includes 10 extra Saturday's bring the total to 52 Saturdays: Fundraiser salary £14k for 14 hours a week; Operations Manager salary £27k for 28 hours per week; £17,550 younger person's service (39 sessions) and £15k befriending service (up to 30 befrienders matched). (Project costs have been calculated via present SLT Saturday Project costs and guidance from other charities).

**Expenditure Notes 2021/22:**

£210,573 includes 52 Saturday's; Fundraiser salary £14k for 14 hours a week; Operations Manager salary £27k for 28 hours a week; £23,400 younger person's service (52 sessions) and £20k befriending service (up to 50 befrienders matched). (Project costs have been calculated via present SLT Saturday Project costs and guidance from other charities).

**Expenditure Notes 2022/23:**

£215,041 includes 52 Saturday's; £14k Fundraiser salary for 14 hours a week; £27k Operations Manager for 28 hours a week; £23,400 younger person's service (52 sessions) and £20k befriending service (up to 50 befrienders matched), plus 3% inflationary uplift. (Project costs have been calculated via present SLT Saturday Project costs and guidance from other charities).





