



***Inclusion Together***  
**Strategic Plan**  
**2018-2021**

## NOTE FROM THE CHAIR AND CHIEF EXECUTIVE

### **Inclusion Together, 2018- 2021**

Welcome to Orchardville's Strategic Plan, **Inclusion Together**, reinforcing our vision of achieving an inclusive society where equal rights are enjoyed by everyone.

**Inclusion Together** is the product of intensive discussion with our key stakeholders – service users/participants, parents/carers, staff, employers and funders, and of benchmarking with organisations in the third sector in NI and beyond.

We are very grateful to all who took the time to talk to us and give us their views and thoughts, helping to shape the way forward.

The recurrent theme from the development phase of the strategy was to build on our strengths of employment and progression and community inclusion for people with learning disability and /or autism and in doing so we will continue to shape our vision for an inclusive society.

The future is uncertain, and there will be challenges along the way but **Inclusion Together** is our blueprint for Orchardville for the next 3 years. It will enable us to build on our core strengths enabling us to respond to the needs of people with learning disability and/or autism so that each person we support can achieve their hopes and aspirations. In doing so we will continue to raise awareness within our society of the ability, ambition and determination of the people we support.

Reflected in our strategy is the recognition that a passionate, skilled workforce and an engaged and committed team of volunteers, including our Board of Directors, are key to the delivery of our vision.

**Inclusion Together** will also guide us in implementing annual business plans outlining specific activities and targets, along with the necessary metrics to measure our progress. We will continually assess the effectiveness of our actions against these goals, and we will be accountable to our stakeholders for the progress made toward these goals.

We encourage each of you to take your part in making our future happen..... achieving a society that is inclusive for all.

**Martin Howell, Chair**

**Joan McGinn, CEO**

## NOTE FROM THE VICE CHAIR OF THE USER FORUM

The User Forum, representing all Orchardville's participants, looks forward to the introduction of **Inclusion Together** and the opportunities and experiences that it will give us to progress, develop and to achieve our hopes and goals.

We believe that our views are well reflected in **Inclusion Together** and we look forward to working with staff and the Board of Directors in carrying out the strategy.

**Matthew Emmerson, Vice Chair, User Forum**

## OUR VISION

### OUR VISION

To achieve an inclusive society where equal opportunities are enjoyed by everyone.

### OUR MISSION

Orchardville is committed to be the leading provider of opportunities to EQUIP people with a Learning Disability and/ or Autism to achieve their individual ambitions.

### VALUES

### WHAT THIS MEANS IN PRACTICE

#### Empowerment

Orchardville, Families, Employers and Funders work together to enable all users to achieve their goals and aspirations.

#### Quality

Through creativity and innovation we are committed to providing excellent services to meet the changing needs of all users.

#### User

We place the service user at the centre of what we do.

#### Integrity

We place high value on the reliable and honest way we conduct our business and will ensure everyone is treated equally and respectfully.

#### Passion

At the heart of our team we are passionate to energise, engage and inspire everyone.

## OUR CORE SERVICES

Orchardville’s services fall into three distinct areas:

- Employment
- Skills
- Community Inclusion

EMPLOYMENT	SKILLS	COMMUNITY INCLUSION
Engagement Vocational profiling Job Search On the job training and support Career progression	Pre-employment skills Essential Skills Strategy Accredited Training Vocational Skills	Social and leisure opportunities Developing social networks Social and community activities
Services		
Employment & Progression	Employability Hubs	Inclusion & Progression
EU Ignite Project Workable Programme Wellbeing for Work	Industrial Solutions Orchardville Business Centre The Orchard Café Gifts that Give Orchard Crafts	Transitions Project Connect Next Steps Horticulture Independent Living Skills CLASP Service User Forum Parent Forum

## THE STRATEGIC CONTEXT

# Strategic Context - Learning Disability

### Employment

**+ 42%**

working age disabled people  
claiming benefit from 2011-16

**1 in 3**

of those unemployed are either  
disabled or long term sick

**1 in 5**

of those in Day Centres would be  
able to hold down a job

### NI Population



**2.22%**

have a "learning difficulty, an  
intellectual difficulty, or a social or  
behavioural difficulty" **2011 Census**

**x4**

children diagnosed with autism in last  
15years

**25%**

of individuals with Autism will have  
an accompanying learning disability

### Health

**1,200**

die prematurely in NHS every  
year



die on average 20 years  
earlier



die on average 13 years  
earlier

### Mental Health

People with learning disabilities  
present with a higher prevalence  
of mental health problems  
compared to those without

### Education

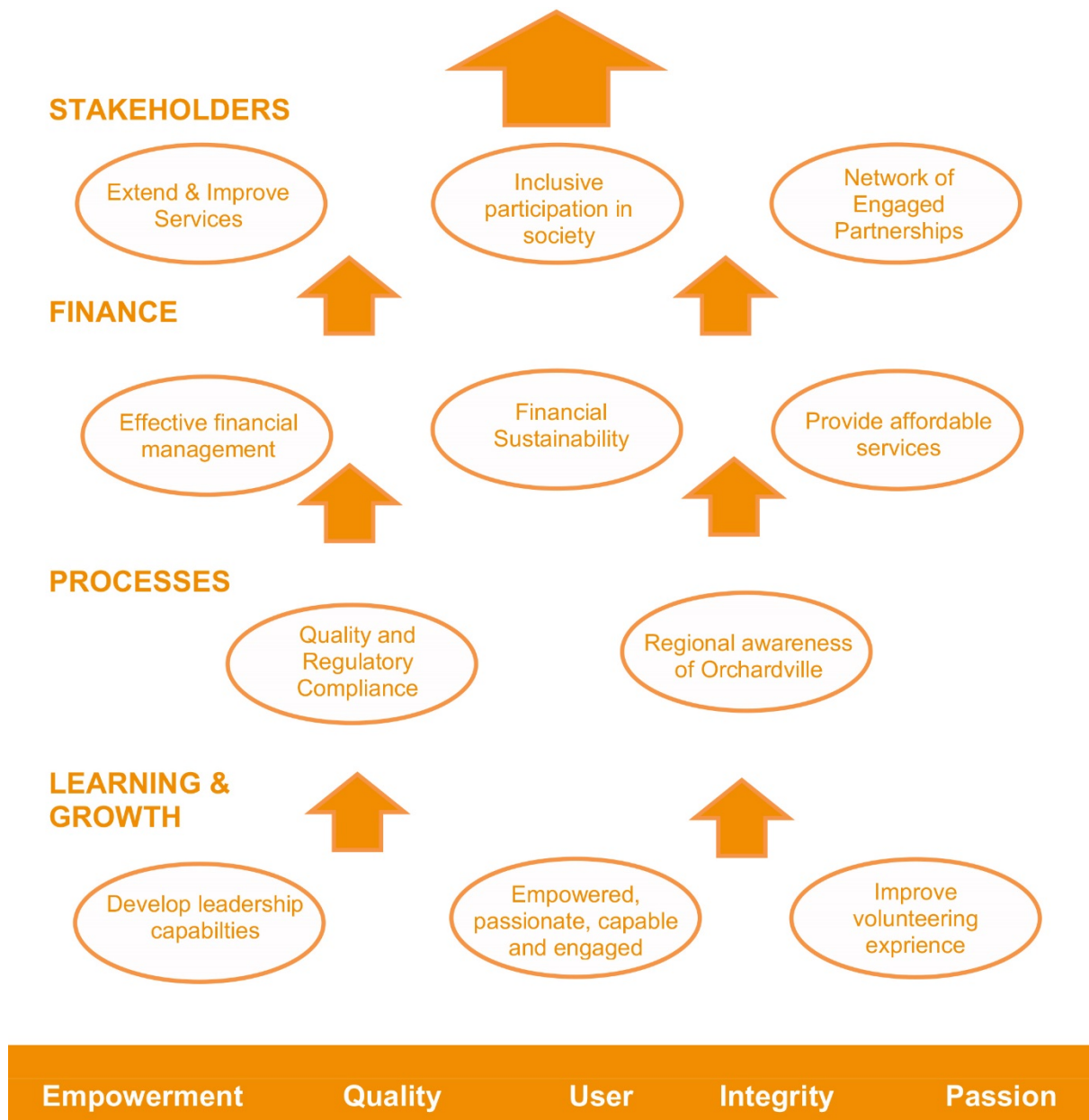
**+ 52%**

pupils with SEN needs enrolled in NI Schools since 2003-04

## OUR PRIORITIES AND INDICATORS OF SUCCESS

**Vision:** To achieve an inclusive society where equal opportunities are enjoyed by everyone.

**Mission:** Orchardville is committed to be the leading provider of opportunities to EQUIP people with a Learning Disability and/ or Autism to achieve their individual ambitions.



## Orchardville's Balanced Scorecard 2018-2021

The 'go to' support for People with Learning Disability & Autism								
Objective	Measures	17/18	Y1	Y2	Y3	Initiative		
STAKEHOLDERS	Extend and improve services to meet current and emerging needs	Nos engaged service users	500	500	500	500	Parent Forum roll out plan (Y1, Q1) (HI&P) Wellbeing service plan (Y1, Q1) (WBO & HE&Ps)	
		Service User Satisfaction	95%	95%	95%	95%	Introduce in-house approach to Self-Directed Support (SDS) (Y1, Q 1) (HI&P & Finance)	
		Service user reviews	95%	95%	95%	95%	Information bank with useful information for service users and carers/parents (Yr1, Q4) (H&EP)	
		Service User Forum	12 p/a	12 p/a	12 p/a	12 p/a	Review Life Star pilot and identify recommendations (Y1, Q1) (HI&P)	
		Parent Forums	2p/a	2p/a	2p/a	2p/a	Agree the ideal Customer Journey (Y1, Q2) (HE&P)	
		New Initiatives implemented	Understanding Orchardville services information leaflet for parents (Y1, Q4) (HE&P) (HI&P)					
			Service User Charter (Y1, Q2) (HE&P + HI&P)					
						Research Stages of Life Transitions (Y1, Q2) (HI&P)		
						New Initiatives process to encourage innovation (Y1, Q4) (H&EPs/HI&P)		

Enable and	Service User Progression		75% of all	75% of all	75% of all	Welfare Reform research and
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encourage inclusive participation in society	<p>Service Users achieve a positive outcome:-</p> <ul style="list-style-type: none"> <li>• Employment</li> <li>• Education/Training</li> <li>• Community</li> </ul>	15	participants progress 24	participants progress 30	participants progress 32	<p>development plan (Y1, Q4) (H&amp;EP)</p> <p>Develop a Learning Disability Awareness programme for employers (Y1, Q4) (HE&amp;Ps)</p> <p>Identify a range of community, sporting, transport and recreational groups to develop relationships with (Y1, Q4) (HI&amp;P)</p> <p>Research use of technology/apps to enhance training for service users (Y2, Q1) (E&amp;P Manager)</p>
Further develop the network of engaged partnerships	<p>Unique Employers</p> <p>Employer champions</p> <p>Partnership Satisfaction</p> <p>SES Alliance</p>	<p>100</p> <p>5</p> <p>Alliance maintained</p>	<p>110</p> <p>10</p> <p>95%</p> <p>Alliance maintained</p>	<p>120</p> <p>15</p> <p>95%</p> <p>Alliance maintained</p>	<p>130</p> <p>15</p> <p>95%</p> <p>Alliance maintained</p>	<p>Develop relationships with employers on 'Buy Social Brokerage' list (Y1, Q3) (HE&amp;Ps)</p> <p>Employer champions recruitment and retention strategy (Y1, Q4) ((HE&amp;Ps)</p> <p>Relationship development plan for employer networks, councils, agencies and healthcare professionals (Y1, Q3) (CEO)</p> <p>Partnership Satisfaction Survey (Q4) (Q&amp;CC)</p> <p>Identify a range of organisations to develop partnerships with for parenting, benefits advice, housing, relationships, wellbeing and transport (Y1, Q4) (CEO)</p> <p>Orchardville's Alliance opportunity plan (Y2, Q1) (CEO)</p>



F I N A N C I A L	Objective	Measures	17/18	Y1	Y2	Y3	Initiative
	Provide effective financial management procedures	Clean Audit & No Priority 1s	100%	100%	100%	100%	Monthly M/A produced by 15th working day of the month
		Income v Budget	95%	95%	95%	95%	Financial procedures manual (Y1, Q1)
		Expenses v Budget	85%	85%	85%	85%	Procurement schedule pilot (Y1, Q1)
		Claims on time	95%	95%	95%	95%	Update approvals limits for payment (Y1, Q1)
		Debtor days	74	70	70	70	Financial plans/ budget prepared and agreed by Directors in advance of new financial year (Q4 annually)
		Creditor days	67	40	40	40	
	Create financial sustainability to give confidence to all stakeholders	<b>Income:</b>					Social Enterprise improvement plan (Q3) (HE&PS)
		Funding SE Fundraising	£1.63m £159k £27k	£1.79m £254k £25K	£1.81m £228k £25K	£1.74m £230k £25k	Fundraising Strategy (From Y2 - Q1 annually) (Marketing & Communications Coordinator)
		Surplus	£171k	£123k	£73k	£28k	
Unrestricted reserves		£377k	£375k	£375k	£375k		
Operating margin		9.4%	6%	3.5%	1.4%		
Compliance with Contract Activity Levels		90%	90%	90%	90%		

<p>Maintain strong financial performance to provide affordable services</p>	<p>Re-investment</p>	<p>%</p>	<p>%</p>	<p>%</p>	<p>%</p>	<p>Develop Investment Policy (Y1, Q3)</p>
	<p>Increase unrestricted funds</p>		<p>+1%</p>	<p>+3%</p>	<p>+5%</p>	<p>Update Reserves Policy (Y1, Q3)</p> <p>High level document to provide and assess affordable services (Y2, Q2) (CEO)</p>

	INTERNAL PROCESSES			EXTERNAL PROCESSES			OPERATIONAL PROCESSES			
	Objective	Measures	17/18	Y1	Y2	Y3	Initiatives			
INTERNAL PROCESSES	Promote regional awareness of Orchardville	Web visits	2000	+10%	+10%	+10%	Appoint a Marketing Co-ordinator (CEO)			
		Social Media Engagement:					Marketing plan (Y2, Q1, Marketing Coordinator)			
		Followers	1200	+10%	+20%	+30%	Social Media plan (Y2 Q1)			
		Page likes	1200	+10%	+20%	+30%	Update website (Y1, Q1), HE&P initially and thereafter Marketing Coordinator			
		Online Donations	zero	+5%	+20%	+30%	Develop a media policy Y1, Q3, CEO/Director of Ops			
		Press Coverage		4	8	10	Internal and External Communications Plan (Y1, Q4) (CEO/Directors of Ops)			
	INTERNAL PROCESSES	Improve quality and meet regulatory compliance obligations	EFQM	-	-	-	4 Stars	Appoint a Quality and Compliance Officer (Y1, Q1) (CEO/Director of Ops)		
			liP	Bronze	Silver			Continuous Improvement Plan (Y1, Q1) (CEO / DCEO)		
			ISO 9001	-				Research most appropriate quality standard for Orchardville (Y1, Q3, Quality & Compliance Coordinator)		
			ETI: Outcomes & /Leadership	VG	VG	VG	VG	Project team to research technology to be used internally and with service users (Y1, Q3)		
Quality of Provision-			O/S	O/S	O/S	O/S	Investigate funding opportunities to trial immersive technology/virtual reality (Y1, Q3)			
						Explore viability of Supported Employment Quality Framework SEQF (Y3) (CEO/Director of Ops)				

		Objective	Measures	17/18	Y1	Y2	Y3	Initiative
L E A R N I N G  A N D  G R O W T H	Further develop our leadership capabilities to maintain a well governed and flexible organisation	Staff Leadership Training						Leadership development framework (Y1, Q4) (HR)
		Board serving within terms						Review and update Memorandum and Articles (Y1, Q3) (GOV GROUP)
		Board Attendance	77%	85%	85%	85%	Review and update new Board reporting structure (Y1, Q4) (CEO/Director of Ops)	
		Good Governance Health Check					Succession planning guide (Y1, Q2) (HR)	
							Governance Improvement Plan (Y1, Q4) (CEO/Director of Ops)	
							Governance Training (Y1 Q3) (CEO/Director of Ops)	
							Competency Framework (Y1, Q4)	
							Restructure (Y1, Q1) (CEO)	
							Review need for further IT support (Y1, Q1)	
							Review and update performance review process (Y1, Q2) (HR)	
	Develop an empowered, passionate, capable and engaged staff team that inspire service users be the best they can be	Engagement levels	44%	65%	75%	75%	Roll out Capability Policy (Y1, Q1) (HR)	
		Retention	91 %	>90%	>90%	>90%	Learning and Development plan (Y1, Q4) (HR)	
		Absence	1 %	<2%	<2%	<2%	Team Charter (Y2, Q1) & Team Charter Training (Y2, Q2) (HR)	
		Learning & Development Days per person	0.4	3	5	5	Recognition and Reward Strategy (Y1, Q2) (HR)	
		Performance Management Plans	100%	100%	100%	100%		

						Engagement Strategy (Y1, Q3) (HR)
						Assess best workplace awards to enter (Y3)
						Employee Wellbeing Initiative (Y2, Q1) (HR)
						Salary breakdown (Y2, Q2) (HR)
						Recruitment costs per job role (Y1, Q2) (HR)
Improve the volunteering experience to enhance and expand services	Nos Volunteers (cumulative)	30	40	60	80	Volunteer recruitment strategy (Y1, Q3) (HI&P)
	Volunteer Hours	90	120	240	320	Engagement and Retention Strategy (Y1, Q4) (HI&P)
	Retention	60%	60%	60%	60%	Annual volunteer satisfaction survey (Q4) (HI&P)
	Satisfaction	95%	95%	95%	95%	

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		Social Media Engagement: Followers	1200	+10%	+20%	+30%	Marketing plan (Y2, Q1, Marketing Coordinator)		
		Page likes	1200	+10%	+20%	+30%	Social Media plan (Y2 Q1)		
		Online Donations	zero	+5%	+20%	+30%	Update/refresh website (Y1, Q1), HE&P. Ongoing updates will be responsibility of Marketing Coordinator		
		Press Coverage		4	8	10	Develop a media policy Y1, Q3, CEO/Director of Ops		
							Internal and External Communications Plan (Y1, Q4) (CEO/Directors of Ops)		
INTERNAL PROCESSES	Improve quality and meet regulatory compliance obligations	EFQM	-	-		4 Stars	Appoint a Quality and Compliance Officer (Y1, Q1) (CEO/Director of Ops)		
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		ETI: Outcomes & /Leadership	VG	VG	VG	VG	Project team to research technology to be used internally and with service users (Y1, Q3)		
		Quality of Provision-	O/S	O/S	O/S	O/S	Investigate funding opportunities to trial immersive technology/virtual reality (Y1, Q3)		
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		Performance Management Plans	100%	100%	100%	100%	Engagement Strategy (Y1, Q3) (HR)	
							Assess best workplace awards to enter (Y3)	

						Employee Wellbeing Initiative (Y2, Q1) (HR)
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	Satisfaction	95%	95%	95%	95%	



