

## Business Plan 2015





**Leading in the provision of creative and innovative services that promote growth, dignity and personal choice**

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## Executive Summary

Surrey Choices is a Local Authority Trading Company (LATC) wholly owned by Surrey County Council. We began trading on 18th August 2014 and serve people with learning and physical disabilities, sensory impairments, autism and Aspergers Syndrome, older people and those with dementia. This is our strategy for the next three years:

Surrey Choices is an emergent brand with a strong vision, values and mission. We have no eligibility criteria or pre-determined age range for our customers. We support individuals paying for their services and support directly, regardless of who “pays”.

Our business challenge is significant; post-transfer from the Council, we have a legacy product range that has to adapt to an evolving market characterised

by longer life expectancy, more complex conditions, an ageing population and an increasing number of children with ever more complex needs surviving child birth. We will respond with new and innovative products and services at more affordable prices, targeting markets where the features of our business add value, incentivise commissioners and improve customer experience and outcomes.

We are conservative in our projections. We project business volumes overall to grow by 5% compound annual growth rate with a 3% decline in our Surrey

County Council contract value being offset by other external sources of revenue. Gross margins will remain strong and net margins will improve over the business plan as the business matures. These improvements are reflected in cash generation and free cash flows, in turn growing shareholder value.

We plan to optimise our delivery model in order to deliver social and economic value and customer-focused responses to need and demand. We will create an affordable range of services for a wider range of customers and encourage genuine customer choice.

### During 2015/16 we will develop new services and products:

- For young people from summer 2015, including a “game zone”
- That extend our service offer for older people
- To excite and energise our existing customers and potential customers
- Including a short breaks and home-based support service
- To double the scale of Shared Lives provision in Surrey
- That re-orientate EmployAbility to a broader potential market to increase employment

Everything at Surrey Choices is about the customer; we will not forget the customers we already have when planning growth or expansion. Through innovation combined with careful stewardship and ruthless focus on the customer, we will deliver social and economic value for all our stakeholders, and build a company of which everyone involved can be justly proud.



# Business Description

Surrey Choices is a Local Authority Trading Company (LATC) wholly owned by Surrey County Council. We began trading on 18th August 2014 and provide services to people with learning and physical disabilities, sensory impairments, autism and Asperger’s Syndrome, older people and those with dementia.

## The industry, present and future



**14,830** people with dementia over the age of 65 live in Surrey with a projected increase to 18,600 by 2020



**21,000** people in Surrey have a learning disability, with 4000 aged 65 and over.



Surrey has **1,109** providers of adult social care services.



**£1bn**  
An estimated £1bn is spent on adult social care by local authorities in South East England, excluding London

# 85%



**Eighty-five** per cent of adults over 65 now live in local authorities that have eligibility for services **with substantial or critical** needs only, including Surrey.

The Board of Directors normally meets four times a year and ad hoc as required. It devotes its time to overseeing the Surrey Choices strategy, quality and risks, workforce development, and monitors organisational and financial performance. We have organised the way we run our businesses to ensure we are customer focused in

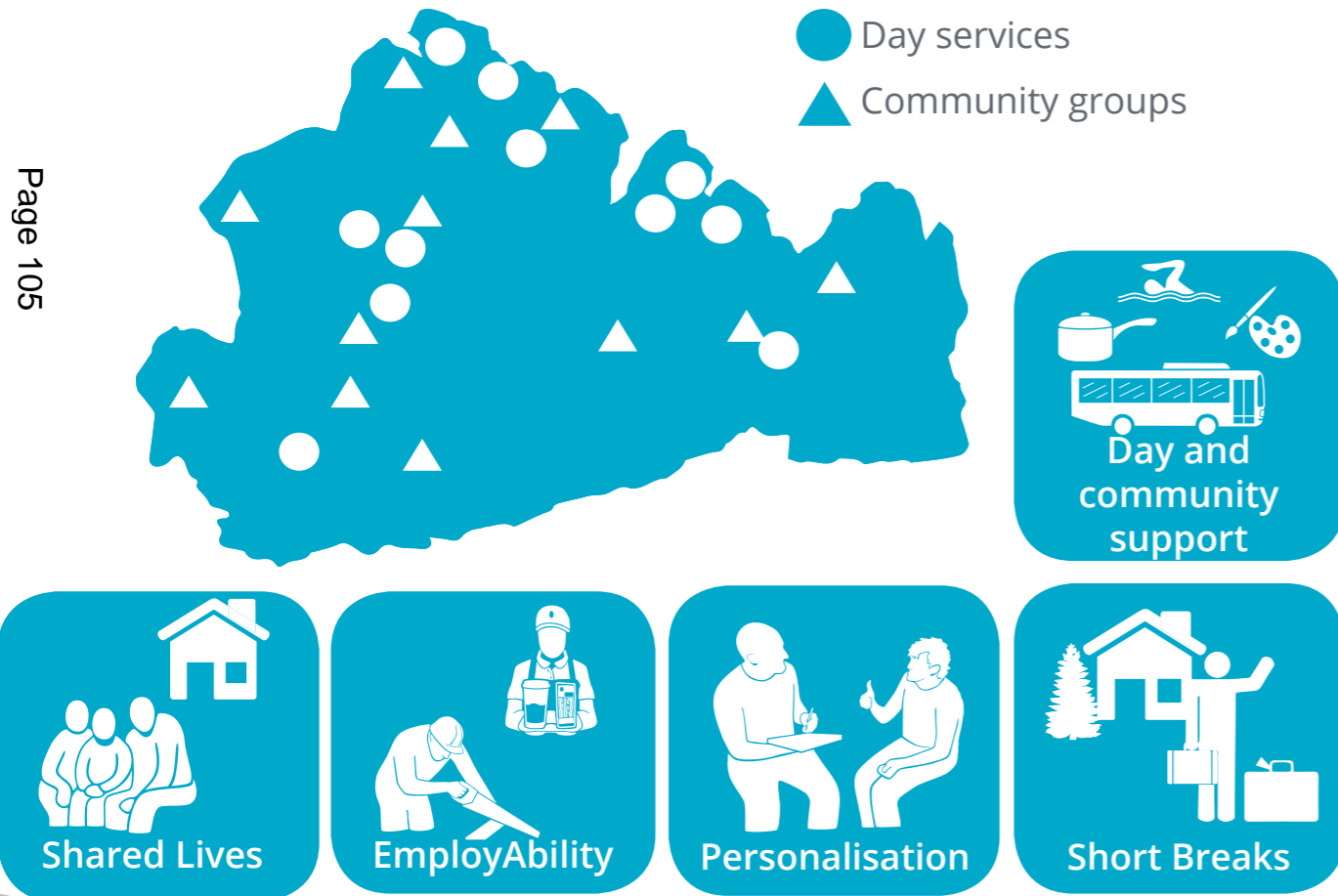
an integrated and efficient manner. Both our customers and business unit managers have freedom and clear accountability to drive best practice, innovation, standardisation and customisation, as appropriate.



# Products and Services

As laid out in the Surrey County Council Cabinet paper in December 2013, the principles that underpinned the creation of Surrey Choices were to combine the best of public and private sectors, to develop service offers that are affordable, close to where people live, integrated into the local community, cost-effective and sustainable, without compromising quality.

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The company was also encouraged to work in partnership with people who use services and their families/carers, to capture and fulfil their aspirations as Surrey residents and tax payers.

## Shared Lives

Shared Lives is a national scheme exclusively provided by Surrey Choices. The service supports people to live permanently in the homes of our approved Shared Lives Carers, including a wide range of people with disabilities, people who have experienced drug and alcohol misuse, ex-offenders and parents with disabilities requiring intermediate care.

short breaks. Shared Lives demonstrates proven placement stability, enhanced individual outcomes, and significant cost reduction compared to residential or supported living provision.

Shared Lives is an opportunity to be part of the family and community, offering friendship, support and care. The service offers long term homes at present, and is increasingly looking to offer day support and



## Products and Services

### Day services and community support

We currently offer day services and community opportunities to a broad range of customers, with learning and physical disabilities, sensory impairments, autism and Asperger's Syndrome, older people and dementia.

The company offers a range of services from leisure and sports fitness, market stall holding, to horticulture and countryside management, sessions in performing arts, creative art, crafts and skills-building opportunities, to "Tea and Memories" and 'Men in Sheds". This is extended through our evening breaks service, supper clubs, speed dating, aromatherapy, five-a-side football and evenings out at the pub and cinema.

We also operate a range of community based and specialist services in most parts of Surrey. These are not building-based and work specifically to meet the preventative agenda, and enable a wide range of people living in the community to spend time with friends, meet new people and have a normal social life.

### Supported employment, skills for living and work

EmployAbility is a supported employment service that finds work and volunteering opportunities for people with disabilities, or other potential challenges to employment. The service develops skills, confidence and independence to raise aspirations for work. EmployAbility has a number of enterprise projects, such as countryside management and grounds maintenance, beauty, office administration and catering in supported environments. The service works with both individuals and employers across Surrey. A further 399 people are supported with "light touch" guidance, advice and "check-in" following employment or building up to seek employment.

### Professional social work practice (The Personalisation Team)

This team is made up of qualified social workers, unqualified social workers and Occupational Therapists with skills and experience across both children's and adults' social care. The team is commissioned to provide professional capacity into social care services but can also be bought privately. It follows clear, structured and person centred social work approaches, ensuring people are supported in a timely but flexible way, to make informed choices and take control in all areas of their life.

Our team follows a payment by results approach, and an end to end service tailored to offer initial review through to the implementation of a support package.



## Organisation Structure

Surrey Choices employs 304 people: 70% full-time staff, 25% part-time and 5% bank staff. Across the business we employ managers, project leaders, day service officers, support workers, drivers, technology specialists, marketing professionals, HR professionals and accountants, and are supported by volunteers.

Over 90% of our people work in direct service delivery; Surrey Choices has de-layered management, reduced agency usage for temporary staff and

increased permanent employed staffing; there are now just three tiers of management across the entire business with an average span of control of 1/10.

There are three Executive (or equivalent) roles:



**Simon Laker**  
Managing Director



**Paul Oliver**  
Chief Finance Officer



**Ian Hutchinson**  
Chief Operations Officer

Surrey Choices built a robust commercial model for former Council services to transfer into rather than exiting the services from the Council and then trying to turn them into a business; this differentiates Surrey Choices from its peers and gives us a specific competitive advantage.



# Strategy of the Company

We will work with people of all ages and with a variety of needs, disabilities or long-term conditions; **Every Life, Every Chance**. Our strategy is to differentiate our services based on a brand known for quality of care, customer intimacy and value for money. Our aim is to work with partners to raise the standards of the market overall whilst protecting the scarce resources available to funders.

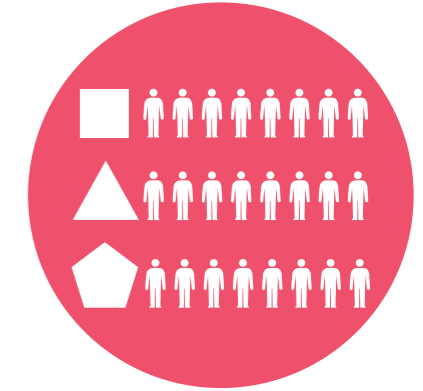
We will attract new customers:



with new products



through marketing to non-Surrey commissioners



with new market segments improving our reach.

We will develop our current customer base:

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through improving our understanding of their needs and wants



by preparing for spot purchasing, direct payments and individual budgets.





## Market Positioning

The industry overall is projected to grow significantly in terms of volume, based on demand levels increasing among both commissioner purchasers and individuals.

Surrey Choices product range is driven by a strategy determined to offer abundance of choice. We do not distinguish between needs and wants but instead bring them together and build the features of our product range.

There is a potentially large total market available to our business, but our activities will be targeted to where our product features

match the needs of a market and delivers economic or social value, or reductions in whole life costs to commissioners.

At present the scope of our operations is too narrow; our challenge is to enhance and broaden that scope while retaining coherence and delivering a clear commercial strategy.

## Competitive Strategy

The competitive strategy of the business is to build a trusted brand that differentiates us from other providers owing to our customer focus and innovation. This market is not competitively intense but it is fragmented; there is a range of organisations from the private, public and third sector, none of whom have a dominant position. Typically competitors have a wider scope than Surrey Choices and lower scale, meaning we can collaborate as often as we compete where it is in the best interests of customers. Other LATCs have attempted to grow aggressively through a broadened scope of services offered, and some have acted as a highly disruptive force, particularly to the third sector.

Surrey Choices recognises these risks and so our approach is to work in the best interests of customers, working with others where they are better placed to provide services than us. We will

grow where there is clear added value for customers, economic viability or an incentive for commissioners, and an acceptable risk and return for shareholder.

**“Think, act  
and deliver  
services  
differently”**

# Customer Journey

The intrinsically customer-focused nature of Surrey Choices will drive our strategy and develop our product; it will ensure we are fit-for-purpose as a provider of market-led services and our capacity will be deployed in services that can demonstrate need and demand and progress customer through our six customer journey points.

## Every life, every chance

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1. How well do we understand the needs of every person we support?



2. Do we offer genuine choice, value, positive outcomes and opportunity?



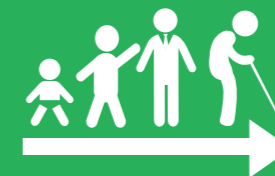
3. How should we develop existing services and improve the offer?



4. Which new products and services should we develop based on what people tell us?



5. Are our services flexible, responsive and tailored to people's lives?



6. Growing the service offer for each individual



To lead and provide creative and innovative services that promote growth, dignity and personal choice

# Customer Journey

Our journey points are not about merely collecting data and reporting performance. We will evidence through our quality framework, real-time support plans, and ongoing customer dialogue, how effectively each customer right is being delivered and in turn our values are being brought to life.

**"choose and receive excellent services"**

**"lead a full and fulfilling life in their community"**

**"be heard and listened to"**

We deploy our resources at our Customer Journey Points and will replace former services where need, demand or a combination of both are not being met. Customer Journey Point 1 has established an evidence base for our product development priorities of 2015/16:

## Younger people

- the opportunity to sail, drive a power boat and develop skills for independence
- developing accessible sporting opportunities for all at a variety of our locations
- week long courses across the county with a focus on occupations and vocational skills

- a game zone with our technology partners in safe location (both physical and digital) to participate game design, play and interaction
- extend evening breaks services targeted at 18-30 year olds, including discos, buffets and networking, "go to" trips, and speed dating

## Non-residential service products

- scheduled transport between Surrey Choices key service offers e.g. hydro pool, soft indoor sports, pottery kilns etc
- to exit up to three of our old buildings to reprovide our services in a variety of better, newer and more convenient locations
- moving into new locations and areas where our services have not been offered before
- ending former Council-run closure periods during school holidays, in real terms
- extending opening hours and days of support by 10%
- using technology to drive our services and products to deliver enhanced customer and business outcomes
- our "day centres" will cease to be "day centres"; we will provide community-wide facilities



# Customer Journey

## Short Breaks

- Personalised breaks within a new bespoke 6-bed facility in Banstead, which offers a spacious and high-end living environment, with scope to support a wide range of support needs
- Opportunities to go away overnight or for weekends, or perhaps for longer holidays, with continuity of a trusted and skilled staff team

- Home-based care and flexible models of support built around individual needs and lifestyles in the home, whenever wanted and for as long as needed, to an individual or family to go away, out for the day, or to take a break
- We aim to increase our respite capacity during this year in another location

## Shared Lives

- To identify sufficient Shared Lives carers during 15/16 to offer this as the default choice for long term care and support for anybody moving from children's services to adults' social care

## EmployAbility

- We will remove eligibility criteria to attract additional customers with low-level support needs
- We will re-orientate the service to focus on recruitment and securing contracts with employers
- We will move historical enterprise services into our non-residential product range

## Older people

- develop affordable range of services for older people countywide



## Operations Management

We intend to build a reputation on quality and customer service so that our customers become our greatest advocates. We will do this by enhancing quality, improving our service and developing our product features, underpinned by a culture of high performance among teams and individuals.

The Surrey Choices Quality Framework is based upon the Care Quality Commission Essential Standards and Outcomes.

We expect all of our services, Regulated and Non Regulated, to work to the same standards and customer expectation.

## Performance

Our performance management structure places customers at the centre of organisational activity to ensure a consistently high quality service across the business and a caring, competent and well led staff team. Our workforce is a strategic priority for Surrey Choices; it is not just what we do but how we do it that matters.



## Delivering Our Plan

By following this plan, Surrey Choices will optimise our delivery model, leverage our assets and maximise the value of the unique features of our business, to develop new services that are customer focused and new products to target markets where we add value, incentivise commissioners and improve customer experiences and outcomes.

Surrey Choices will introduce a new level of customer-focus and service quality in its target markets and become a nationally recognised brand over the next five years.

“A new level of customer focus and service quality”



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