

FitzRoy



Our Strategy 2024-2027



Our strategy 2024-2027



Quality

- Deliver outstanding services
- Expand our clinical leadership and expertise
- Deliver family designed services
- Embed our mental health provision

Community

- Our services are active in our communities
- People we support are heard and belong
- Increase our impact and our social value
- Fundraise to improve lives

Voice

- People with lived experience influence our strategy
- Increase our profile as a leading care provider
- Demonstrate the difference we make
- Amplify the voice of our stakeholders

People

- Our staff are proud to work for us
- Invest in our leaders
- Embrace equality, diversity, inclusion and wellbeing
- Value our staff as experts

Transformation

- Invest in our digital resilience
- Insight and data drives our decisions
- Exploit new technology to enhance people's lives
- Drive a culture of continuous improvement

Sustainability

- Deliver purposeful growth
- ESG is part of our everyday decision making
- Deliver financially sustainable services
- Invest in our property portfolio

Our purpose

We enable people with learning disabilities, autism and mental health needs to thrive, living more independently at home and at the heart of their communities.

Our vision

A society where people are treated as equals within inclusive communities and empowered to ensure their rights and aspirations are met.

Our values



We see the person



We are brave



We are creative



Introduction to FitzRoy's strategy 2024-2027

62 years ago, Elizabeth FitzRoy refused to accept a society where people with learning disabilities were marginalised and excluded. Decades later, our work continues, and we are proud to present our strategy for 2024 to 2027.

We want to say a huge thank you to everyone involved in the development of our strategy – colleagues across the organisation, the people we support and their families. There have been creative and brave conversations about where we want to be in 2027, and as always – the people we support have been at the heart of all of our discussions.

There is a strong strategic focus on our workforce and quality of our service delivery. Our aim in the next three years is to foster innovation, finding ways to improve the support we provide so people can continue to thrive and be in control of their lives. We want to develop closer partnerships with our colleagues across the sector, including local authorities and health boards. Together with our aim to exploit the benefits that technology can bring, we aim to ensure we continue to provide outstanding care to people with learning disabilities, autism and mental health needs.

In these challenging times, we are also focusing on our financial sustainability and digital resilience. This pragmatic approach will ensure that we have the bedrock in place so that we can meet the ambitions and aspirations of the people we support.

Community plays an enormous part in our strategy. How we can build relationships in the communities where the people we support live, empowering them so they can have a greater voice as valued members of their local communities is a core part of our vision.

We are so proud of everything FitzRoy has achieved over the last six decades, and the values that Elizabeth FitzRoy displayed all those years ago are still woven through everything we do today. We look forward to reporting on our progress and the difference we make to the lives of the people we support over the next three years.

Our



goals

Quality



Our priorities explained

Quality is integral to how we think about and deliver our work. At our best, we can ensure that the people we support live better and happier lives by providing quality services and support.

We cannot be complacent, we always need to push ourselves to do better, to be brave with the choices we make and the support we offer. And we want to share our expertise, our journey to excellence and what we learn with our colleagues across the sector.

- We want to keep our focus on delivering outstanding services because the impact of our experience and our specialisms on the people we support will never be enough, we will always want to do more.
- We will expand our professional – or clinical – expertise so we are best placed to meet the needs of the people we support to enable them to live in the community. We will expand our specialist team so that the rest of the organisation and the sector can draw from our shared expertise, driving innovation and fostering collaboration.
- We're excited about our work with families, building tailored services from the ground up for their loved ones. We will do more of this, working closely with families, tailoring our services to the evolving needs of people with learning disabilities, autism and mental health needs, developing new ways of providing support.
- Many people we support experience anxiety or depression or other mental health conditions. We also support people who may not have a diagnosed learning disability, but who thrive with the type of support that we offer when they are leaving institutions. Our expertise in this area is invaluable and we want to strengthen it.
- We will continue to develop how we measure outcomes for the people we support, develop our support plans and our training programmes to reflect their increasingly complex support needs.

Year 1 24/25

- 85% of services achieving a FitzRoy good/outstanding rating
- Define Centre of Excellence objectives
- Two family designed services
- Revenue from mental health services will grow up to 10%

Year 2 25/26

- 90% of services achieving a FitzRoy good/outstanding rating
- Broaden the expertise developed as part of our Centre of Excellence
- Four family designed services
- Revenue from mental health services will grow up to 12%

Year 3 26/27

- 95% of services achieving a FitzRoy good/outstanding rating
- All staff can access our Centre of Excellence knowledge hub
- Six family designed services
- Revenue from mental health services will grow up to 15%



Community



- Our services are active in our communities
- People we support are heard and belong
- Increase our impact and our social value
- Fundraise to improve lives

Year 1 24/25

- Launch our community engagement strategy
- Embed how services coproduce and evidence outcomes in support plans
- Complete external audit on social value
- Increase fundraising to 1% of overall income

Year 2 25/26

- Increase service community engagement to 50% participation
- 30% of people we support actively participate in their community
- Define how we will demonstrate social value progress and success
- Increase fundraising to 1.5% of overall income

Year 3 26/27

- 75% of services actively engaged in their community
- 70% of people we support actively participate in their community
- Deliver social value programme
- Increase fundraising to 2% of overall income

Our priorities explained

Empowering the people we support to be at the heart of their communities where they are able to participate and contribute is a core element of our strategy. We believe that fostering connections and networks will enrich the lives of the people we support as well as our local communities. We want to take advantage of local opportunities to work together, opening up opportunities for the people we support to play a valued role in their community.

- Our commitment to community engagement is reflected in our ambitious goal to have 75% of services involved in active participation and fostering connections.

- We will work to empower the people we support, elevating their skills and confidence, and enabling them to be heard. Our targets around the people we support participating in their communities reflects that we understand some people may choose not to and we will always be led by what is important to them. We will equip those who want to be involved to navigate and actively participate in their communities, in the ways that they choose.

- Our new impact measurement tool showcases the tangible ways in which we transform lives, and is a key part

of our drive to share our learnings and demonstrate the difference we make. By measuring our impact we are better able to drive improvement and innovation in the lives of the people we support.

- We will demonstrate our social value, focusing on creating positive and measurable change in the communities where we live and work.

- Through increasing our fundraising to 2% of our overall income we will harness support from a variety of funders to improve the quality of life and the outcomes for the people we support, as well as underpin our commitment to innovation.



Voice



- People with lived experience influence strategy
- Increase our profile as a leading care provider
- Demonstrate the difference we make
- Amplify the voice of our stakeholders

Year 1 24/25

- Fundraise for and recruit a co-production lead
- Achieve 1% growth through new partnerships
- 80% of support plans have agreed outcomes and goals
- 10% of families have stakeholder input

Year 2 25/26

- Develop a family forum
- Achieve 2.5% growth through new partnerships
- 95% of support plans have agreed outcomes and goals
- 40% of families have stakeholder input

Year 3 26/27

- Effective family forums in place
- Achieve 5% growth through new partnerships
- 100% of support plans have agreed outcomes and goals
- 50% of families have stakeholder input

Our priorities explained

FitzRoy exists because of the powerful voice of a mother more than 60 years ago, determined to change the expectations that people with learning disabilities should be isolated from society and living in institutions. Today this remains a core element of our work, ensuring people are supported in their local communities.

We value the lived experience of the people we support and their families, their insight and voices shape our services, our ethos as a charity and our purpose for existing. Our strategy will deliver a step change in how they influence our decision-making and the coproduction of our support and services. At FitzRoy people come first, and we continue to put people – the people we support and their families and our staff – at the heart of everything we do.

- Through a range of family activities and forums, we will enable families and the people we support to tell us what matters to them and can share their insight and experiences, and get involved in the co-production of our services.
- This new strategic focus will increase our profile among our key stakeholders and create campaigns on a range of topics to engage and support commissioners and parents.
- Through purposeful engagement and collaborative partnerships, reputational growth will cement the confidence that our stakeholders place in us as a leading care provider.
- We aspire to be an impact-led charity and using thought leadership backed up by powerful data and research, demonstrate to wider audiences the tangible difference we make.
- Our commitment to the people we support meeting their goals is a reflection of our passion to go above and beyond and support people to achieve their aspirations.
- With a much greater emphasis on our collective voices guiding the decisions we make, we set ourselves a target of 50% of our families having stakeholder input.



People



Our priorities explained

A culture of wellbeing and inclusion across the organisation, enables us to provide excellent, person-centred care to the people we support. We are proud of our staff and the incredible work they achieve day to day, and we want them to feel proud to say they work for FitzRoy. Our staff are experts in their field. Their expertise, dedication and passion are key to our ability to provide excellent services and support. By valuing and empowering our expert staff, we enhance the quality of our care and create a better quality of life for the people we support.

- We want people to choose us as their employer because they see that FitzRoy is a brilliant place to work. We will be tracking the impact of the improvements we make, with an ambitious goal of maintaining 95% of our staff saying they are proud to work for FitzRoy.
- At FitzRoy we want our leaders to embody our core values and inspire others to be the best. Investing in values driven and accountable leadership for our managers is fundamental if we want to ensure our leaders have the tools they need to create and lead outstanding teams.
- A thriving workforce is the backbone of our success, and we are committed to creating an environment which champions equality, diversity and inclusion – we will be launching a

programme of activity to measure and improve our progress. Recognising and celebrating our differences not only enables us to better reflect the people we support and the communities we work in, but also improves staff wellbeing and provides the breadth of experiences that a diverse workforce brings.

- We will continue to develop our staff recognition programme including external awards and accreditation to celebrate the achievements and expertise of our staff and promote continuous improvement.

- **Our staff are proud to work for us**
- **Invest in our leaders**
- **Embrace equality, diversity, inclusion and wellbeing**
- **Value our staff as experts**

Year 1 24/25

- Achieve over 60% staff survey response rate
- Assess all managers against new leadership framework
- Collect and review all EDI and wellbeing data
- Review data gaps to achieving external accreditation

Year 2 25/26

- Achieve over 65% staff survey response rate
- 75% of managers achieve against leadership framework
- External recognition for staff achievement
- Achieve one regional and one national staff award

Year 3 26/27

- 95% of staff say they are proud to work for FitzRoy
- 90% of managers achieve against leadership framework
- Two national awards recognising staff achievement
- Receive a recognised employer certification



Transformation



Our priorities explained

With around 1800 staff across 110 services supporting hundreds of people, how we use technology, our data and our systems matters. We want to be more effective, target our resources, measure our impact and free up our staff so they can focus on providing quality care. Our ambition is to harness technology so we can empower and innovate as well as cultivate a culture of continuous improvement, always challenging ourselves to do things better for the people we support. We have set some ambitious targets to ensure that we remain focused on improvement and innovation that has a direct impact on the people we support.

- Invest in our digital resilience
- Insight and data drives our decisions
- Exploit new technology to enhance people's lives
- Drive a culture of continuous improvement

Year 1 24/25

- Complete digital resilience assessment
- 65% of services exceed the FitzRoy KPI standard
- Deliver emerging technologies trial
- 40% of staff are confident using digital tools

Year 2 25/26

- Achieve Cyber Essentials Plus accreditation
- 70% of services exceed the FitzRoy KPI standard
- 15% of our services use emerging technology
- 60% of staff are confident using digital tools

Year 3 26/27

- Achieve coordinated data sharing with our partners
- 80% of services exceed the FitzRoy KPI standard
- 25% of our services use emerging technology
- 80% of staff are feel confident using digital tools

- We want to be data driven: recognising the value of data in our ability to evidence the difference we make and enabling decision making at every level to be evidence led, through enhanced data insight.
 - enable us to contribute to a broader ecosystem where aggregated data can identify need and inform decision making in the sector.
- We aspire to be leaders in the care sector by adopting cutting-edge solutions and embracing emerging technologies, trialling new ideas and sharing our experiences, enabling our work to improve the lives of the people we support.
 - We've set a target for 80% of our services to exceed the FitzRoy KPI standard, an internal benchmark we use to measure and reward high performance among our staff teams.
 - A digitally empowered workforce is critical to how we provide effective support, and we aspire for 80% of our staff to say they feel confident in using digital tools.
- We aim to achieve interoperability – where our systems work with those of our partners – so the people we support can benefit from the organisations involved in their care sharing useful and reliable information about their needs and their support. This collaborative approach will



Sustainability



- Deliver purposeful growth
- ESG is part of our everyday decision making
- Deliver financially sustainable services
- Invest in our property portfolio

Year 1 24/25

- Achieve an operational income of £58m
- Review our ESG status and develop workplan
- 75% of mature services financially sustainable
- Property investment strategy is developed

Year 2 25/26

- Achieve an operational income of £63m
- Launch ESG targets
- 80% of mature services financially sustainable
- Increase our investment in property portfolio

Year 3 26/27

- Achieve an operational income of £69m
- Achieve level 3 ESG external maturity framework
- 85% of mature services financially sustainable
- Increase our investment in property portfolio

Our priorities explained

Without focusing on the sustainability of FitzRoy as an organisation, we cannot fulfil our promises to the people we support and their families to deliver outstanding person-centred care. Our staff and the people we support deserve that we take our sustainability seriously, so we can grow and improve and as always, do better.

- Central to our strategy is the ambition to increase the number of people we support, and a measured approach to ensure that growth is sustainable and creates lasting impact in the communities where we work.
- A core pillar of being a sustainable organisation is our environmental, social, and governance (ESG) activities, we will bring in external expertise to guide us on this journey as we commit to exceeding sector standards.
- A focus on financial wellbeing is critical in enabling us to run sustainable services, while allowing us to invest in the resources we need to provide excellent support and recognise our workforce.
- We will lever our assets to build a high-quality property portfolio, creating homes that enhance independence and improve the quality of life for the people we support.
- We will increase our investment in a high-quality property portfolio, and work with partners to capitalise on new opportunities that can deliver lasting impact.





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