

What is CREATE?



Cooperation

Cooperation: between employees to deliver training opportunities whether these be on the job or learning, cooperating to free up people whilst maintaining service.

Reflect

Reflect: What have I learned, what I feel I still need to learn, how my behaviour impacts others.

Empower

Empower: I am the key to my learning success, I own my CPD and will be active in my development and keep up to date and be aware of when I need to attend learning, I will be active and not passive in my development.

Achieve

Achieve: I can be successful, I can achieve my goals and aspirations and support others to achieve theirs, I will look to my and others future.

Talent

Talent: I will think of the career progression and be active in identifying talents in myself and others, success is a shared objective.

Evaluate

Evaluate: We will always think of how we can improve, can we do things differently, does what we are doing meet our vision? If not change it.

The Leading Lives Story....so far

Milly Gaskin

Who are we?

- A social enterprise & cooperative providing a range of social care supports to vulnerable adults & family carers
- Operating across Suffolk & into neighbouring counties
- A public sector 'spin-out'

“To support people to lead the lives they choose”

“Your Life our Support”

What do we do?

- 6 service / business lines
- 32 business units across Suffolk
- 450+ staff
- £11m turnover
- 1,200+ customers
- 20 properties
- 12 x CQC registered services

Cooperative

When we spun out of the County Council we realised our workforce was **our** best and most important asset and therefore decided to set up an employee owned company

The real value of services to the client being based on the expertise and commitment of the support staff. Through this structure, the commitment of valued staff can be structurally connected to the needs of the business.

Employee members within Cooperatives can be the most loyal and enterprising individuals as you work within an organisation you own.

Why did we “spin out”



New Strategic Direction

- Demographic issues
- Financial pressures
- Changing policy

= Divestment

What did we need to consider?

Had to take account of;

- Personalisation (PB's)
- Tightening finances / budget savings
- Changing customer demand
- Affordability & sustainability
- Protecting front line services
- Urban & rural issues

How did we approach Divestment

1. Research – fact finding & innovation visits
2. Consultation – key stakeholders
3. Listened - to what people said
4. Compiled & evaluated our findings
5. Identified divestment options

What did we find out?

- Customers - people with lifelong needs
- Growing no. of younger people in transition
- Knowledgeable, skilled & experienced workforce
- “Known, trusted & valued staff”
- Track record of change & innovation
- The market - strong competition in some areas but significant limitations in others
- Some very exciting models of Social Enterprise

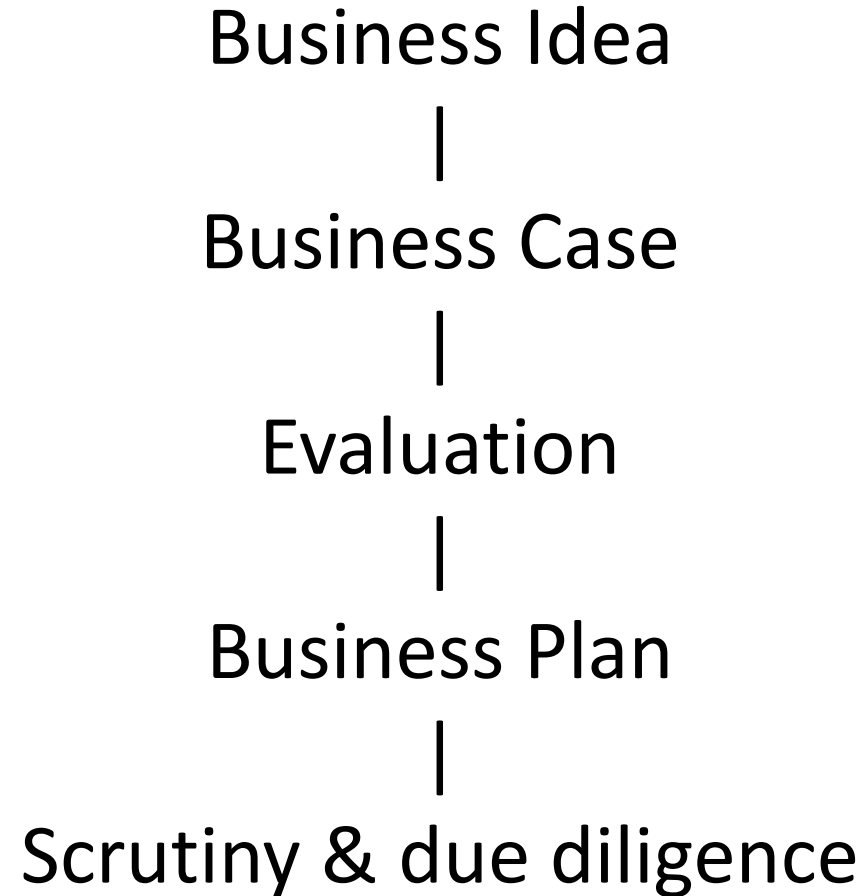
So what were our options?

1. Stay in SCC – death by a thousand cuts!
2. Break up service into smaller chunks & invite tenders
3. Keep service together & invite tenders
4. Keep service together & create new employee owned cooperative/social enterprise

We liked the cooperative model so we....

- Developed an internal business idea
- Presented this to SCC
- Received strong interest & encouragement
- Developed an outline business case
- Researched legal models / structures
- Took external financial & legal advice
- Researched implications / requirements

The Divestment Process?



Building Leading Lives?

- Chose our legal structure
- Registered new company
- Formed an interim Board
- Staff suggestion + vote for co. name
- Staff vote on co. logo
- Cultural Change

The Board

- Can have up to 15 members of which 3 are ex-officio's (*i.e. holding senior executive positions in the co.*)
- Each Locality will have a number of Locality Managers who report to the Directorate Team which has full operational responsibility for the organisation and reports to the elected Board..

Our Interim Board

LL Interim Board



Building Leading Lives

- Further developed our ideas + business plan
- Compiled our financial model
- Submitted CQC application
- Staff TUPE consultation
- Started turning our service into a business
- Contract negotiations

We did it!

Transferred resources
30th June 2012
& started trading 1st July 2012



What's life like on the other side?

- Exciting & frightening
- Freedoms & flexibilities
- Break through red tape & bureaucracy
- Unleash staff talent & creativity
- Opportunity to reshape services, grow & diversify

The New Challenges

- Building a new company from scratch
- Developing the workforce
- Attracting new customers/retaining existing ones
- Adapting supports to customer demands
- Moving to affordable services
- Developing new pricing structure
- Cash-flow & sound financial mgt
- Delivering on contractual requirements
- Competing in a commercial environment
- Cultural change (massive)
- Upholding our values

Where are we now?

- 5 years trading, its our Birthday Tomorrow
- More established, knowledgeable & confident
- Achieved trading surplus first 4 financial years exceeding targets
- 25% business growth (*main contract now only 75% of total income*)
- Established new back office support / specialists
- Completed 4 x full AGM's
- Completed 3 year main contract – now into 2 year extension plus a further year agreed to run from 1st July 2017
- New Service Line
- First Sub Brand: Create

Big Stuff

- Gained 2 new Supported Living Contracts
- Purchased our first property (in process of purchasing 2nd)
- First training contract
- Made our first service acquisition - Crossroads Care East Anglia
- Launched a brand new service line

Celebrating Success

- 2015 National Health & Social Care of the Year: Social Enterprise Awards
- 2016 National Employee Ownership Award for Lucy Humphrey
- 2016 3 x Suffolk Care Awards
- 2015 1 Gem Award for Suffolk
- 2014 Future Fifty East Anglian Daily Times
- 2013 Highly Commended Baxendale Awards Employee Owner

Maintain Success what we have to do..

- Be more proactive, take personal responsibility, take control
- Make more effective / efficient use of resources
- Be able to evidence / demonstrate the benefits
- Develop our business & business opportunities
- Be less Council Minded

How are we achieving this?

- Through a clear & targeted Business Plan
- Keeping staff on board & involved
- Continuing to deliver good quality, flexible, efficient & effective services
- Adapting / responding to customer & commissioner requirements

The Benefits

- We choose what we deliver....
Who we deliver this to....
And what this will cost
- No service closures after 5 years
- More flexible use of resources – staff, buildings equipment etc.

Benefits

- Not for profit – surplus re-invested into local infra-structure
- Local purchasing
- Investment into local economy / community (LL Community Benefit Fund)
- Countywide service – reach the hard to reach rural areas
- Employee owned Cooperative - *stronger ownership, improved motivation, staff investing more of themselves / going the extra mile, my business with stronger commitment to making it successful!*
- (80+%) of staff ‘shareholder members’
- Lean & mean structure
- Run by people who know & understand the business
- Buy-in additional expertise as and when needed.....

Benefits

Improved quality, outcomes, choice & control

- Re-energised staff with stronger commitment
- Increased activities / sweating assets
- Greater flexibility
- Expand / contract locality delivery according to demand
- More bespoke / tailor-made supports
- More mix'n'match
- More of supporting 'what I want, when, where & how I want it delivered' & less..... 'this is what we do if you want to come along & do it'
- More support of complex packages
- More support to younger people in transition
- Commitment to promote move-on

Benefits

Human Resources

- New (flatter) HR structure representing needs of new business / direction of travel
- 2-tier workforce means we can compete & reduce costs
- New approach to:
 - Pay & Reward
 - Performance Management
 - Recruitment
- Team Link Forum – staff input to Board
- LA transferred staff retain access to LGPS / stakeholder scheme for newer staff
- Closer HR management (our own team)

Benefits

Finance and Efficiency

- Virtually same service volume 5 years on for reduced cost having absorbed rent, corporation tax + non-recoverable VAT, surplus, pay awards etc.
- Budget step-down + hand back to LA
- Closer budget monitoring (our own team)
- 29% reduction in 'back office' costs
- Supplies & services – rationalisation, closer monitoring & better local deals
- Stronger commitment to efficiency employee-owned – every penny we save goes back into our enterprise...

Community Benefit Fund

Leading Lives from its profits puts money into our Community Benefit Fund. This is a fund other local organisations can access money from to undertake projects, fund activities.

The fund is monitored by the Board and all applicants have to go through a screening process. The Community Benefit Fund is an example of how we help support our Social Aims.



Tips for Success

Market research

- Customer analysis
- Competitor analysis

Models & structures

- What exists / what are the options?
- Visit / speak to others
- Take expert advice
- What best suits your unique requirements?

Tips for Success

Understand the implications of running a business

- People management
- Finance management
- Property management
- Transport management
- Supplies & services
- Regulation / compliance

Tips for Success

- What is your service offer?
- How does this meet customer & commissioner demands?
- What are your USP's?
- Do the sums add up?
- Provide regular information to all stakeholders throughout the process