



## Strategy & Plan – 2023/2024

### Strategic Context

#### *History 2009- 2019*

1. Since its small beginnings in 2009, as a grassroots community of disabled people working together, BuDS has always identified the biggest barriers facing disabled people and set up many pilot initiatives to tackle them. BuDS pilots have covered a very wide range including accessibility, events, transport, work, hate crime, benefits and social care services. Most of these pilots have been exceptionally successful and this work made BuDS one of the most expert disability organisations in the UK, with a portfolio of proven pilot projects which, if implemented on a larger scale, could transform the lives of disabled people.
2. However, until 2020, BuDS' business model was not similarly successful. The charity attempted to maintain sustainability and independence by keeping costs exceptionally low and relying wholly on volunteers, primarily disabled people themselves, to run the charity and its projects. While this approach had many strengths, such as making the charity agile and well-informed, it also had the great disadvantage that BuDS persistently lacked the resources to follow-up on its successful pilots and to take up opportunities to do more to help disabled people. Some great projects failed due to lack of resources and many others never got beyond the concept stage. This approach also had the significant risk that the loss of two or three key volunteers at the wrong time could be a huge set-back or even fatal to projects, which badly affects disabled people's interests.
3. BuDS Trustees took the strategic decision in late 2019 to gradually evolve the charity to a more effective model. While retaining a focus on volunteer support, BuDS also wished to secure longer-term funding to support a small core staff team. This staff team would provide additional capability and continuity to allow BuDS to deliver more projects on a more sustainable basis.

#### *Covid Expansion: 2020 – 2022*

4. The coronavirus pandemic that began in March 2020 greatly accelerated the planned strategic move from a purely voluntary charity to a mixed model of paid staff and volunteers. During the

period 2020/21 and 21/22, BuDS moved from a very small voluntary charity with projects led personally by Trustees to a small charity with (at its peak) 14 paid staff and nearly 100 active volunteers. Nearly all those projects were Covid-related in some way and funded by short-term Covid emergency funding. Early 2022-23, however, saw the abrupt end of Covid contingency funding and BuDS was forced to retrench pending replacement funding from other sources, with staff numbers falling to 4, although they are now building up again.

### Beyond 2022

5. In April 2021, BuDS adopted strategic goals for the next 2 years. The table below shows the objectives and the extent to which they have been achieved, together with a note on future action.

Objective	Progress	Future Action
Evolve Covid projects into Non-Covid or Mixed projects which are still of high value to disabled people	<b>Fully achieved.</b> The Fair4All Card, BuDDies & Enquiries projects have all been successfully established as standalone projects or services.	None required
Apply for additional and continuation funding for those projects so that staff expertise can be retained and output maintained.	<b>Partially achieved.</b> These three projects were partially funded in 2022-23 but that funding hasn't continued into 2023-24	Take forward into 2023-24 Strategic Plan
Appoint a paid service manager for the Covid projects if they look likely to continue into 2022.	<b>No longer relevant.</b> While the Covid IAG project is continuing, it does not require a paid manager.	None required
Revive and develop the Fair4All Access, Public Spaces, Events, Benefits and Attitudes/Hate Crime projects.	<b>Mostly achieved.</b> All of these projects were revived in 2022 and are continuing into 2023, although the Benefits and Events projects are faltering in 2023.	Take forward into 2023-24 Strategic Plan
Apply for funding for those projects so that volunteer teams can be properly supported by paid staff.	<b>Partly achieved.</b> Funding has been secured for Fair4All Access/Public Spaces and Attitudes/Hate Crime projects,	Take forward into 2023-24 Strategic Plan

Appoint a paid service manager for these projects when needed.	but not so far in 2022-23 for Events or Benefits.  <b>Not achieved.</b> While the need for a part-time Fair4All Project Manager is established, no funding source has been identified.	Take forward into 2023-24 Strategic Plan
Continue to develop housekeeping functions and build up volunteer teams in these areas	<b>Partly achieved.</b> While progress has been made in developing finance and HR systems, little progress has been made in developing volunteer teams in these areas.	Take forward into 2023-24 Strategic Plan
Continue to develop and expand Reach4Work and BuDDies and apply for funding for those projects so that volunteer teams can be properly supported by paid staff.	<b>Partly achieved.</b> Partial continuation funding for R4W and Buddies in 2022-23 has expired and as yet not been replaced.	Take forward into 2023-24 Strategic Plan
Build BuDS as a social community through starting to develop the BuDS Include function	<b>Not achieved.</b> No progress has been made in this area.	Review appropriateness of objective
Maintain the size, skills and commitment of the Trustee Board	<b>Mostly not achieved.</b> Although two high quality candidates have been recruited, it generally has been hard to fill vacancies on the Board and currently 6 of the 11 executive Trustee posts are vacant.	Take forward into 2023-24 Strategic Plan

6. Summarising strategic progress since April 2021, the overall picture is encouraging but with significant concerns. BuDS has very successfully pivoted from a strong Covid focus to a mixed portfolio of projects, and we have successfully managed the abrupt end of Covid contingency funding in 2022. However, our progress towards full funding of our projects is patchy and there are significant weaknesses in the Trustee Board and in housekeeping functions. These areas will need sustained work in 2023-24.

### Values

7. BuDS has adopted formal values ([BuDS Values.pdf](#)) which are reviewed annually.

## *Strategic Principles*

8. The Trustee Board adopted the following strategic principles in 2019:
  - a. BuDS will continue to be an effective advocate for disabled people and tackle the problems most important to disabled people themselves. We will maintain our independence so we can continue to pursue an autonomous agenda. Our Trustee Board will remain principally made up of disabled people themselves and we will remain an activist organisation for and by disabled people, both volunteers and employees. BuDS will remain wholly committed to the social model of disability and implement the social model in all its activities.
  - b. BuDS will continue to have a sustainable business model with costs kept low and with a mix of equal-status volunteers and employees, primarily disabled people themselves. We must be careful to balance expansion of projects and services with the need to manage housekeeping functions like finance, HR and governance. We will always have a back-up plan in place in case of a funding shortfall which means we have to revert to a 'basic' purely voluntary model.
  - c. BuDS will continue to have a mixed source of funds and will never be reliant on one or two funders. So that we remain sustainable and independent, our basic core costs will continue to be covered by a variety of grants and donations. We will seek grant-funding and other income for our projects, so that they are sustainable and contribute to the core costs of the charity. Council, NHS and government grants and contracts will be considered for change and service-delivery projects but not if the terms of the grant or contract endanger our independence and core values.
9. These principles remain in force but will be formally reviewed in 2024-25.

## **Strategic Plan – 2023/24**

10. Complying with our values and the strategic principles listed above, BuDS will work opportunistically and flexibly in 2023/24 to achieve the strategic goals listed below

### *Governance/Housekeeping*

11. These are the strategic goals relating to the charity's governance and housekeeping functions:
  - a. **Restore the effectiveness of the Trustee Board** by recruiting a replacement Chair and Treasurer; two Vice-Chairs; and three Executive Trustees with appropriate lead responsibilities.
  - b. **Make significant progress towards changing BuDS' legal form** from an unincorporated membership association to a charitable company limited by guarantee
  - c. **Complete the change from Excel to SAGE** for all accounts and bookkeeping
  - d. Continue to **build and develop our grants & fundraising team**, especially with volunteers, to enable us to take advantage of all the grants and voluntary funds available to us.

### *Projects*

12. These are the strategic goals relating to the charity's services and projects.

- a. **Develop the role of Project Manager** toward that of a Chief Operations Manager on an appropriate salary. Secure funding to allow the appointment of **two part-time project managers** to improve coordination and delivery of projects and services.
- b. **Maintain all current projects and services, and secure funding** for them so that each has the staff support needed to make them sustainable. No additional projects or sub-projects will be started without specific Trustee approval.
- c. **Continue to recruit volunteers for services and projects** so that each project is adequately staffed to deliver its goals and objectives.

Agreed by the Trustee Board: 15/07/2023

Next Review: November 2023