

# **Bag Books**

## **Strategy 2009-2014 – Update February 2010**

### **Introduction**

Bag Books was founded in 1993. The Memorandum of Association states the following objects: “to promote the recreation and education of children and adults with special learning difficulties and/or physical disabilities in particular through the use of tactile books and related material in the interests of social welfare and with the object of improving their conditions of life.”

In October 2008 the Trustees agreed a Mission Statement

*“To enhance the lives of children and adults with learning disabilities through the use of multi-sensory books”*

and set some associated aims and objectives. This strategy and workplan sets out a strategy whereby those objectives can be achieved. First we need to consider the strengths and weaknesses of the organisation together with the opportunities and threats that the charity faces.

### **SWOT analysis**

#### **Strengths**

- Uniqueness – we are the only organisation in the world publishing multi-sensory stories for people with profound learning disabilities.
- The organisation’s purpose and work is well respected within the special education field.
- We have a “product” – from a fundraising viewpoint we’re not just another charity offering an advice helpline.
- Experienced and dedicated staff team plus a growing band of volunteers.
- We have a relatively conservative reserves policy.

#### **Weaknesses**

- Although the financial situation improved dramatically in the last six months of 2009, much of this improvement was due to one-off income – the underlying finances of the charity still require careful and prudent management.
- Although the overall proportion of voluntary income received from charitable trusts fell from 86% in 2008 to an estimated 60% in 2009 and number of non-individual donors increased from 56 to 111, there is still room for further diversification in our sources of income.
- A pricing policy adopted by the Trustees in July 2009 has evened out the subsidy across our range of titles but the cost of producing the books is high.

#### **Opportunities**

- Opportunities to involve corporate teams in “volunteer craft days” should be nurtured and used as a springboard for corporate fundraising.
- We should consider ways of maintaining our Story-Go-Round work once the current UK tour is complete and make the most of our follow-up time-limited Telling Tales project.
- Build on the positive financial picture and use it to attract more funders.
- Continue to develop income from sales and especially training.

## Threats

- Production costs increase pushing up sales price.
- Although the finances are much healthier than previous years, it is still susceptible to fluctuating income streams and careful monitoring is required together with increased efforts to strengthen and diversify fundraising.
- Stakeholders start to see us as a social enterprise rather than a charity – we need to emphasise the subsidy and our status in relevant communications.

## Strategy, KPI's and Workplans

This Strategy and Workplan fleshes out the six charitable objectives agreed by the Trustees and also considers two organisational objectives. It sets sub-objectives and Key Performance Indicators (KPI's) so that progress against each objective can be measured.

### Charitable Objective 1

*To promote Multi-Sensory Storytelling Technique within the academic, library and special educational fields.*

In order to secure this objective, we will set the following sub-objectives:

- a) Publicise our work through articles in journals.
- b) Attend specialist exhibitions.
- c) Provide workshops at conferences.
- d) Increase our web presence.

#### Key Performance Indicator

- Number of websites linking to ours.  
2009: 253;  
2008: 157

#### Workplan

The Director of Services has agreed a workplan that specifically includes this area of work and he has targets for his first 6 months in post including to write at least one magazine article and to have a stall at at least one exhibition.

### Charitable Objective 2

*To develop a range of developmentally appropriate literature for children and adults with severe and profound and multiple learning disabilities.*

In order to secure this objective, we will set the following sub-objectives:

- a) To obtain funding for new title development.
- b) To continue to develop new, age appropriate, story books.
- c) To consider developing a range of factual books.
- d) To investigate ways of producing a range of cheaper titles aimed at the public.

#### Key Performance Indicator

- Number of new titles.  
2009: 1 at prototype stage;  
2008: 2 in production and 1 at prototype stage.

## Workplan

Although this work is dependent on finding funding, it has proved to be an attractive funding proposition in the past and might help to fund part of the costs of a Director of Services. In the past, our former Director has been in touch with PAMIS, a charity in Scotland, regarding the development of a factual range – this would need to be taken up by the new Director of Services. In order to make it affordable, a new “Bag Books At Home” range might need to be rather different to our existing range of titles but could draw on the tried and tested objects. We have received a promise of £10,000 towards three new titles from a funder and we have an outstanding application for the balance of £9,000. Any new titles should aim to have a sales price below the current median price and should aim to have at least one page that can be completed by unskilled volunteers.

### **Charitable Objective 3**

*To produce story-packs to a high standard.*

In order to secure this objective, we will set the following sub-objectives:

- a) To maintain the quality of our products through the use of talented staff and volunteers.
- b) To increase output through introducing more economic construction methods and through the use of more volunteers.

### Key Performance Indicator

- Number of books made.  
2009: 996;  
2008: 920

## Workplan

Since the move to new premises, we have had some success with attracting talented volunteers and will be looking to expand on this. There may also be some scope to develop less labour-intensive production methods for certain pages but we need to keep the importance of maintaining a high quality product in mind.

### **Charitable Objective 4**

*To organise a programme of storytelling sessions across the UK.*

In order to secure this objective, we will set the following sub-objectives:

- a) To increase the number of storytelling sessions.
- b) To offer storytelling sessions across the whole of the UK.

### Key Performance Indicator

- Number of service users attending storytelling sessions.  
2009: 1,238;  
2008: 1,715  
*(there were three Story-Go-Round tours in 2008 but administratively this was difficult to sustain so we cut down to two tours in 2009).*

## Workplan

With the start of the Big Lottery Fund funded Telling Tales project, we expect the number of storytelling sessions to increase three-fold in 2010. We will also be running Story-Go-Round tours of the East Midlands and Scotland.

### **Charitable Objective 5**

*To train professional workers and parent/carers in the learning disability field as storytellers.*

In order to secure this objective, we will set the following sub-objectives:

- a) To continue to offer training sessions.
- b) To develop a programme of mentoring to assist trainees in putting their training into practice.

#### Key Performance Indicator

- Number of people attending training sessions.  
2009: 506;  
2008: 732  
*(as with objective 4, this was mainly due to the reduction in Story-Go-Round tours from three to two).*

#### Workplan

With the start of the Telling Tales project, we expect the number of people attending training to increase by 50% in 2010.

### **Charitable Objective 6**

*To provide story production work experience opportunities to adults with learning disabilities.*

In order to secure this objective, we will set the following sub-objectives:

- a) To organise and supervise a work experience course.

#### Key Performance Indicator

- Number of people attending a course.  
2009: 0;  
2008: 2  
*(this work is reliant on a Director of Services being in post which was not the case in 2009).*

#### Workplan

With the appointment of a Director of Services we can now begin fundraising for a new course.

### **Organisational Objective A**

*To have long term financial security.*

In order to secure this objective, we will set the following sub-objectives:

- a) Maintain reserves.
- b) Further diversify our funding base.
- c) Improve budgeting and financial management across the organisation.

#### Key Performance Indicator

- Level of reserves.  
2009: 25 weeks;  
2008: 13 weeks

#### Workplan

As the charity grows, the Finance Officer will be further developing our financial systems and controls. With the appointment of a Corporate Fundraising Manager, we hope to significantly develop this area of our fundraising and thus further diversify our income.

## **Organisational Objective B**

*To continually improve our Governance, Management and infrastructure.*

In order to secure this objective, we will set the following sub-objectives:

- a) To review our Governance.
- b) To develop our managers.
- c) To increase the use of volunteers.
- d) To begin working towards the PQASSO quality standard.

### Key Performance Indicator

- Number of volunteer days  
2009: 186;  
2008: 80

### Workplan

Some work on improving Governance has already taken place and a review should take place later in the year to highlight other areas for improvement. Middle managers have received little management training in the past and there is scope for developing their skills if funding allows. Overall, the increased use of volunteers brings new ideas into the organisation and enables us to expand our work in an efficient manner. The PQASSO quality standard represents a large amount of work but it is very useful in highlighting areas where improvements are needed.

*Originally agreed by the Trustees in April 2009.*

*Updated February 2010.*