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**OFF THE RECORD Bristol**  
Summary Business Plan 2010-13

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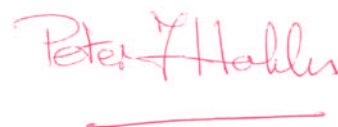
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## Introduction

This is the Off the Record (hereafter OTR) three-year Business Plan to March 31st 2013. It marks the culmination of a twelve month period of external and internal review through which all aspects of OTR's provision have been put up for discussion, and new ideas encouraged and sought from staff, volunteers and young people. Every effort has been made to achieve consensus and we are sincerely grateful to everyone who has contributed to this process.

The business plan is a forward looking document that sets out the underlying delivery philosophy, values, aims, vision and ambition of OTR in the coming years. Having described this ethical foundation the plan has been structured around six fundamental operational domains; governance, finance, physical infrastructure, services, human-resources and marketing.

The plan contains a number of practical actions for implementation that are tied to an organisational action plan, offering all those with a stake in OTR's future a visible reference point against which to measure progress. This plan should be understood as a framework within and toward which OTR will operate, on the understanding that flexibility and opportunism are necessary qualities in our sector.



Peter Hobbs  
**Chair of Trustees**



## Context to the Plan

### External conditions

All voluntary and community sector organisations face a difficult near future. Global and national economic recession means cuts in public spending have coincided with an end to the traditional grant giving culture, a shift towards the commissioning of outcomes, and a personalisation agenda that seeks to maximise the choices service users can deploy when accessing publicly financed health and social care.

Challenging economic and social conditions are also likely to mean demand for services such as OTR's increases as pressure on the resources available to young people, families and communities bites.

Surviving, even thriving, in these conditions will require an efficient operation with a confident and clear identity, thoroughly evidencing the effectiveness of and need for its work. Voluntary and community sector (VCS) organisations will need to become fluent in the more 'corporate' language of government and develop a sharp business acumen sufficient to fully recover the cost of the work they deliver as well as capitalise on the tradable services they can offer. Government is likely to continue to trumpet the virtues of social enterprise to the VCS sector, and embodying the 'business acumen' of such a model makes sense even if an organisation cannot or does not seek to turn a profit.

### OTR's place in the market

Within Bristol OTR sits at Level 2 of the triangle of need. This triangle is important for understanding the 'market' OTR 'competes' in and is derived from the Department of Health's model for Comprehensive CAMHS (Child and Adolescent Mental Health Services) and the impending organisation of a local Children's Trust.

#### Level 4

Specialist services incl. residential and acute for severe and enduring mental health difficulties.

#### Level 3

Specialist and multi-agency services for complex needs.

#### Level 2

Moderately severe problems requiring attention from professionals trained in child mental health.

#### Level 1

Mild, early stage difficulties. This level relates to anyone in contact with young people incl. parents, teachers and youth workers.



Locally, OTR is a very well established Level 2 organisation with a demonstrable and clear 'care pathway' from Level 1. Because OTR is able to draw from a forty-four year legacy and reputation the organisation is clearly viewed by a number of important stakeholders as an integral and trusted provision. GP's for instance, are responsible for signposting some 50-60% of all OTR service users.

The Level 2 'market place' is home to many different types of organisation though most offer services to particular sub-groups or submarkets within this, for example specific localities, BME groups, substance misuse, bereavement, women, carers, etc. OTR is unique and well placed because our core offer to all young people 11-25 in Bristol (and indeed South Gloucestershire and North Somerset) is very simple and attractive: easy to access, free, specialist support. This basic offer is profoundly strong and its integrity must be protected however it manifests itself technically, (i.e. therapeutic models, administrative processes, monitoring regimes).

## Vision, Aims & Delivery Philosophy

### Delivery Philosophy

OTR's delivery philosophy starts from an ethic of authentic love<sup>1</sup> and is founded on core principles of participation, empowerment and social justice. We work to an 'assets model' of mental health that regards individual young people, families, and communities as potential architects of their own recovery and development.

We recognise the social, political, and historical context OTR operates in and the multiple ways in which global processes, (market economics, migration, technologies, political conflict) impact upon the local communities we serve. The roles, identities, and developmental pathways open to different children and young people are changed by these processes and a landscape of this kind requires innovative mental health services sensitive to and reflective of the appropriateness of their own practice and the underlying assumptions they make.

In response to this context and the diversity of our service users we embrace a postmodern theoretical orientation and endeavor to creatively draw from post-structural, feminist, post-colonial, and critical race values, theories and approaches.

We recognise children and young people as social actors in their own right and embrace the spirit and articles of the United Nations Convention on the Rights of the Child. To this end we regard the material inequalities and psychological disadvantage many young people are borne to and that prejudice their long-term mental health and life chances as central to our concern and work. Our delivery philosophy seeks always to maximise young peoples agency and voice both within OTR and wider public life.

### Aims & Objectives

- To become a young person led and centered organisation.
- To support young people to emotionally and practically empower themselves through the provision of free counselling, information, participation, and development work.
- To promote the positive mental health and well-being of all young people.
- To promote young people's rights and participation in relation to mental health and well-being in all areas of public life.

### Values

- We believe all young people, irrespective of their social economic and/or cultural circumstances have the right to accessible, free, meaningful, therapeutic support.
- We believe absolutely in the value of this support socially and the need to advocate for its provision and for the mental health and well-being of children and young people more generally.
- We believe young people are best placed to articulate their wants and needs from our service and that they have the right not only to a voice, but also to participate in and lead our work.
- We believe young people have a right to be heard in wider society and that much of what they experience as individuals emotionally, they have a shared social and political interest in challenging publicly.

### Mission Statement

**"To work alongside local young people to alleviate individual emotional distress, promote and defend the rights and voice of young people in public life, and challenge together the inequalities that lead to poorer mental health and life chances"**

**Off the Record, Bristol  
Young People- Changing Minds**

### Tagline

An effective tagline is a distillation of an organisations delivery philosophy, values and mission statement and is a powerful marketing tool. The tagline is a succinct reference to each aspect of OTR's delivery philosophy. It is explicitly participatory and infers a youth led and centered organisation.



- Young people exploring and changing their minds through counselling.
- Young people challenging the attitudes and changing the minds of adult others regarding representations and the rights of young people.
- Young people working to de-stigmatise mental health and helpseeking, changing the minds of their peers.
- The transitional and changing nature of the adolescent mind.

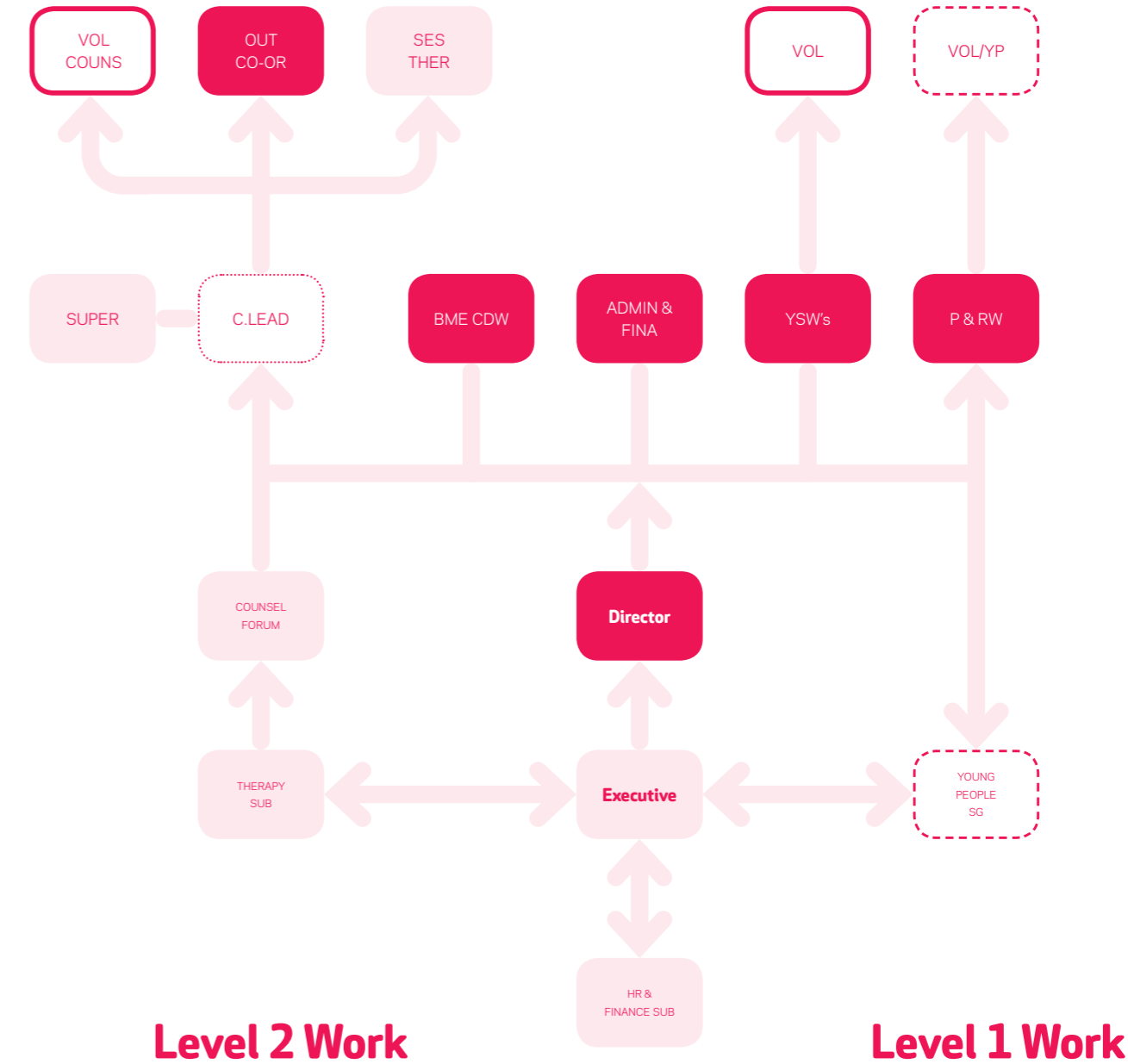
# Structure

The organisational structure opposite is proposed as a simple, robust framework that will allow OTR to grow incrementally from a foundation of clearly defined roles working through two simple strands of work at Level 1 (participation and rights work, mental health promotion), and at Level 2 (counselling and direct therapeutic work).

The structure is inverted (i.e. flows bottom-up) to illustrate a principle of servant-leadership that will run through OTR's management.<sup>2</sup> The aim for OTR in structural terms across this business cycle is simply to re-organise, realise, and consolidate itself to the above model, recognising that funding opportunities are likely to mean variations on this basic theme.

<sup>2</sup> Servant leadership (Greenleaf, 1970) is a model of management where employees/volunteers are an end in themselves rather than a means to an organisational purpose. Nurturing personal growth, self-expression and a sense of community is held to be the most effective way of achieving an organisations optimum performance and potential.

Key Guide	
	Arrows denote lines of responsibility.
	Dashed line denotes areas of young peoples participation and leadership.
	Dotted line denotes voluntary roles.
	Solid red denotes paid OTR staff.
	Red tint denotes vacant or new posts/bodies
VOL COUNS	Volunteer Counsellors
SES THER	Sessional Therapists / Counsellors
OUT CO-OR	Outreach Counselling Co-ordinator
C.LEAD	Counselling Lead
SUPER	Supervisors
COUNSEL FORUM	Counsellors Forum
BME CDW	Black Minority Ethnic Community Development Worker
ADMIN&FINA	Administration & Finance Officer
YSW's	Youth Support Workers
P&RW	Participation & Rights Worker
VOL/YP	Volunteer Counsellors



## Finance

This Business Plan recognises the difficult current and impending financial landscape. Consolidation rather than growth in the first two years of this plan with an ambition for growth in Year 3 is a more realistic financial aim. The first two years of this plan sets out a vision based very largely on a re-organisation of existing resources. OTR can punch significantly above its current weight without adding to its financial burden. Developments proposed will only happen if they are financially viable and/or if funding can be found for them. To this end an internal financial strategy for this three-year cycle has been written. It includes plans to diversify OTR’s income around five themes:

### i. Tradeable Services

- OTR has a number of skills and services it could offer ‘for hire’ at a premium.

- These need to be systematized and form part of an OTR trading arm.

### ii. Efficiencies and Full Cost Recovery

- There are efficiency savings that can be made and OTR must continue to operate a robust model of FCR to ensure any delivery is sustainable.

### iii. Procurement and Commissioning

- Although protracted and prone to reward economies of scale, contracts are

- likely to be for a number of years and provide greater organisational stability.

### iv. Grants and Opportunistic Fundraising

- Grants from charitable trusts will always be important sources of funding for OTR even where they are small local monies.

### v. Social Marketing and Fundraising

- Fundraising and marketing of OTR

### Financial Systems and Monitoring

OTR will develop bespoke project budget proforma so that individual services can be clearly tracked, monitored and costed. This will mean contracted work or projects do not overspend and will be operationally overseen by the Director and fed back to the OTR Treasurer and Executive. A robust Financial Policy will be written in order to clarify spending practices.

## Services

Because of the unpredictability of funding it is difficult to be specific about what OTR’s services will look like in detail come 2013. Overall though, OTR’s delivery will fall into two ‘tiers’ of work at Level 1 and 2, with some work falling in-between.

	Description of work
Level 1	<ul style="list-style-type: none"> <li>Mental health promotion</li> <li>Rights and campaigning</li> <li>Sexual health</li> <li>Community development and participation</li> </ul>
	<ul style="list-style-type: none"> <li>Training and consultancy</li> <li>Strategic advocacy</li> </ul>
Level 2	<ul style="list-style-type: none"> <li>Crisis support</li> <li>Counselling</li> <li>Targeted interventions</li> </ul>

Within the above framework OTR will develop distinct marketable ‘services’ for and with young people and pursue funding streams to meet these ends.

### Youth Support Workers

These posts will be re-orientated from the old Advice and Informal Support Workers (AISW’s) roles. They will be much more ‘outward’ looking, building partnerships and relationships with other services and projects across the city. Features of their work will include:

- Mental health promotion activity (e.g. workshops to professionals and young people on active listening skills, emotional literacy, coping strategies, etc.), sexual health advice, and bespoke developmental projects wherever the opportunity arises.

- Acting as bridges to both OTR’s Level 2 services and other services across the city.

- Offering one-off crisis support for young people who contact OTR in distress, holding them in an ethical and well-governed framework and supporting them to access the appropriate service.

- Attending events and forums on behalf of OTR, promoting the service and advocating strategically for young people.

### Participation & Rights Worker

The function of this post is to engage young people in the OTR Steering Group and to support young people to conduct public mental health and rights campaigns that challenge representations of young people, de-stigmatise mental health, and ‘speak back’ on issues that may be commonly presenting in OTR’s Level 2 work, (e.g. body image or exam stress). This role is designed to add profile to OTR and combine participatory public health and rights work with fundraising.

### Training & Consultancy

OTR can offer these services as an income generating activity. An annual programme of on-site training on a variety of mental health issues will be offered to external agencies and workers at a premium. Bespoke work can also be ‘bought’ that might include training, teaching or consultancy.

### Brief Counselling

The brief model is an important and powerful offer to young people, (quick access to free specialist support without the need for a formal referral), and is entirely appropriate for an organisation working at Level 2. The service is well regarded and evaluated and an attractive proposition to funders. This Business Plan aims to see this service form the basis for Level 2 work out of Horfield Road. The current specification for this service is:

<b>Name:</b>	Brief Therapy Service
<b>Location:</b>	2 Horfield Road
<b>Client Group:</b>	11-25
<b>Catchment:</b>	Bristol, South Glos, N.Somerset.
<b>Model:</b>	6 Sessions
<b>Delivered by:</b>	Volunteer counsellors (qualified or in-training)
<b>Cost:</b>	Free

The Brief Therapy Service will operate Monday through Thursday with an ambition to develop a Saturday service by the end of the second year of this plan. Other than some group work delivered at separate and discrete times, it will be the only Level 2 work running from the Horfield Road site.

### Outreach Counselling

The good work done in OTR's outreach sites over the past few years has demonstrated an acute need for this work in order to extend OTR's reach to some of Bristol's most vulnerable young people. There are ten localities in the city and there undoubtedly exist opportunities to expand into South Gloucestershire and North Somerset. Long-term OTR is ambitious for a presence in all ten localities. The specification for this service is:

<b>Name:</b>	Talking Points
<b>Location:</b>	Various localities, community based
<b>Client Group:</b>	11-25
<b>Catchment:</b>	Bristol
<b>Model:</b>	6 + 6 Sessions
<b>Delivered by:</b>	Paid counsellors (qualified only)
<b>Cost:</b>	Free

### E-Counselling / Text Counselling Service

By year two of this plan OTR will have developed an ethical and meaningful e-counselling service (that is, counselling by email), offered by appropriately trained and supervised counsellors. The possibility for offering a text service will be explored through year 1.

### Group Work

OTR has the capacity and internal skills to offer on-site (and community based) therapeutic group work on a range of issues. It is an ambition of this Business Plan for OTR to start to offer and promote this type of intervention. The technical, ethical and material implications of doing so will be looked at in year one of this plan.

### School & College Counselling Services

OTR will actively pursue partnerships with individual schools, colleges and extended schools partnerships across Bristol. Where opportunities exist this will include work in primary schools, extending OTR's support to a lower age threshold of 8. This service is essential for a core client group that is generally in school when OTR's doors are currently open.

### Targeted Interventions

This refers to much more bespoke work targeted at particular groups of young people. Work falling into this category could be the result of a large successful statutory tender or a small pilot projected funded for a short period of time. It could take the form of individual, group, or systemic work (e.g. family), or indeed some combination of these. It could deploy a particular therapeutic approach (for instance existential or cognitive behavioural) or medium (creative writing, art, drama). Where necessary work of this kind could extend OTR's lower age threshold from 11 to 8.

Some of the groups of young people OTR will seek to develop bespoke work with over the coming plan are:

- ◆ Young offenders
- ◆ Young carers
- ◆ Particular groups of BME young people
- ◆ Refugee and asylum seeking young people
- ◆ Young parents
- ◆ Children in care
- ◆ Disabled young people

- ◆ Young people with learning difficulties
- ◆ Lesbian, gay, bisexual and transgender young people

The development of these interventions provides a platform for innovation and creativity, helping OTR to become a more accessible organisation for groups (such as those listed) who are under-represented in the current service user profile.

## Social Marketing

OTR has a great heritage to trade on but is in need of a makeover to give better and more consistent focus to its work and image in the minds of both young people and stakeholders. Branding is an inherently subjective process less about the creativity of the design than the consistency with which it is deployed. This is especially true of an organisation working with young people aged 11-25, who in their sheer diversity of cultures and development represent many markets rather than one. The Brand Guide in the appendices is recommended as a comprehensive, coherent and modern aesthetic that is both distinct and respectful of OTR's heritage.

Young people will continue to guide what materials and marketing approaches are developed but solid relationships with an external designer, printer and IT support will be developed to help quality assure our marketing.

### Literature

A small range of core literature is proposed based on the following:

	Description
<b>Professionals</b>	<p>A simple, generic leaflet giving an overview of all OTR's services, contact details etc.</p> <p>2 portable conference banners (pull-up) setting out OTR's services in young person friendly language.</p>
<b>Young People</b>	<p>Portable, business card sized (or similar) promotional materials advertising opening times, numbers etc.</p> <p>Targeted flyers/stickers/posters for bespoke projects and services (e.g. LGBT service).</p> <p>Appointment cards.</p>

### Website

The internet has become such a dominant medium for young people, whether accessing information or social networking, that an accessible, multi-format website offers invaluable opportunities to develop both OTR's services and identity. This should include the following:

- Promotion of all OTR services
- Secure online e-counselling
- Online chat forums
- Multi-media health promotion materials (e.g Podcasts, Video)
- Online advice and information on a range of issues
- Events publicity
- Recruitment
- OTR history and heritage
- Links to other services and OTR pages on social networking sites such as *Facebook, Bebo, MySpace* and *Twitter*
- Secure online area for staff and volunteers

The available technology and relative affordability of an online presence means an interactive and vibrant website should be understood in terms of a cost-effective growth of OTR relative to other approaches and given the limited physical space at Horfield Road.

A website also offers a great many opportunities to involve children and young people in a creative and engaging way.

### Marketing, Media, & Fundraising

Social marketing OTR is an ongoing process not limited to developing literature or promotional materials. Staff and volunteers have an important role to play in delivering a consistent, professional but young person friendly and centered profile to the organisation. Social marketing, political profile and fundraising will be pursued in this plan as interrelated concepts. Some features of this drive will include:

- An outward looking AGM and Annual Report that celebrates publicly OTR's achievements.
- A greater presence on local media (print and broadcast).
- A greater presence at community and statutory events and forums.
- Public fundraising efforts that combine young people's participation, health promotion, and the marketing of OTR.
- Exploration of engaging a high profile patron for OTR.



## About Us

Off the Record, Bristol, was set up in 1965 and became a Registered Charity in 1974. Its main aim is to help young people explore their options and find their own solutions to their problems.

**Off the Record, Bristol, is a member of:**

Advice UK Advice Centres (FIAC), Youth Access, The British Association of Counselling and Psychotherapy (BACP), Telephone Helplines Association (THA).

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