MANAGEMENT HANDBOOK

DDPO / PEER-LED / USER-LED

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Disclaimer statements:

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We have really enjoyed the process of connecting with fellow colleagues from other DDPOs and peer-led organisations. While these conversations took place in 2017, they have informed the development of this work greatly. We really valued our time together and have hugely grown from your comments, thoughts, feedback and the insights that you have shared with us. We would like to extend a heartfelt thanks to the following people:

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When I started leading the organisation that eventually became Inclusion Barnet back in 2010, the ‘Improving Life Chances for Disabled People’ white paper was still very much a current document, giving DDPOs a prominence in policy and the minds of local decision-makers. We seemed to enjoy a shared understanding across all stakeholders that the growth of DDPOs and user-led services was to be encouraged and valued. New to the field as I was, it was tempting to think this was permanent progress. After all, if we had demonstrated that disabled people could run our own, successful, services up and down the country, promoting independence and removing barriers to access, then why would you ever go back to the way things were before?

Why indeed, but as more experienced campaigners predicted the gains were not permanent. ‘Improving Life Chances for Disabled People’ got overshadowed by other priorities such as the Care Act of 2014, and larger, more commercially minded organisations took on, at worst, the trappings of user involvement without acquiring the ethos of DDPOs, thus confusing the picture and allowing decision makers to feel they were hearing the authentic voice of disabled people from quarters where traditional power structures had never been dismantled.

The word power is important. Negotiating alternative relationships with power, and alternative relationships between the people who use our services and the people who run them, is key to the work of a DDPO. This is true on both an individual and an organisational level. When working with individuals, we need to avoid the unconscious privilege afforded to traditional workers and work to share our power with the people that use our services at every opportunity. Over the years, one of the most important lessons that we have learned at Inclusion Barnet, is that having the right structures and processes to support the equal distribution of power across our organisation and with the people who use our services is absolutely necessary for accountability.
For me personally as the CEO of a DDPO, the effect of the fading policy drive around DDPOs has meant that proving our value and importance to commissioners got harder. Where once it was enough to say you were user led, and have it taken as a given that this was desirable, I have had to get better at articulating the importance of our work, of stating WHY peer support and user led services were a good thing, arguing the case for our existence. I hope that managers will be able to use this handbook to review their organisational practice, but more importantly to help put structure/words to the practices that we institute instinctively; to capture how we deliver on equality.

For us, the personal really is political and through the work of this handbook, we have come to understand that lived experience must also be accompanied by a set of overarching systems, models and processes that we design and implement using our lived experience. This handbook has been written using the knowledge and experience of our fellow colleagues to provide a road-map for new managers to understand how to do the work of turning our personal politics into organisational practice that is less dependent on individual judgement which can vary in quality – as it can in any organisation.

After 10 years in the field at the time of writing, I have never believed in us more, and after a decade of austerity which has hit disabled people hardest, user voice has never been more important. Particularly now, writing in the time of Coronavirus, it is imperative that this does not become another way of normalising disadvantage as a corollary of disability.

Running a DDPO can be extremely hard work. At its worst, it is stressful, thankless and the enterprise seems doomed to failure. Whatever the standard of the work we deliver, it can feel a drop in the ocean compared to the systemic issues faced by disabled people in the benefits system and elsewhere. But that is precisely why we must persevere. Conventional charities have not been able to tackle the challenges disabled people face effectively, despite their enormous resources and support. So we must continue, and endeavour to do better.

This handbook was conceived to help new DDPO leaders develop and build their organisation, but we hope there will be material which is useful to more experienced managers as well. We haven’t attempted to tackle the perennial issue of the commercial realities we face, as these are so often situation specific, but we have hoped to provide some tools and jumping off points for developing practice and articulating the cause. This can only support our efforts to stay sustainable.
Whilst leading a DDPO can be tough, I want to finish by saying it can also be the best job in the world, and there are days when the job satisfaction is second to none. Whilst we always strive to be better, and often work in an unyielding environment, it is important also to take a moment to savour the cases that went well, the little victories, the arguments won, the outcomes achieved. Our organisations have value, and we must never stop reminding ourselves, our staff and our boards, and society of this. I hope this handbook will help you to articulate that value, and contribute to your strength and confidence in communicating it to everyone who needs to know.

Wishing you every success in your endeavours,

Caroline Collier
August 2020
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INTRODUCTION
DDPO: An Introduction

What is a DDPO?

DDPO stands for ‘Deaf and Disabled People’s Organisation’. There are five main aspects that make up a DDPO:

1. We are led by disabled people.

2. We exist to serve the needs of disabled people.

3. Our management structures and services should be designed to remove barriers to access for disabled people and barriers to work for our staff.

4. We work to models of disability which seek to remove the barriers that disabled people face, not create more, or comply with them.

5. To be truly user-led, is to be accountable to the disabled people that we serve, beyond our staff and trustees.

DDPOs usually achieve these five aspects by working to put the values of the 'social model' and 'independent living model' into practice. Principles from 'human rights' and 'civil rights'-based frameworks can also be very helpful in helping us to understand the rights that we deserve, along with helping us to fight for better rights as disabled people.

You might hear DDPOs talk about the social model or independent living very often, and you might struggle to understand, or pin down what this means for your work. We will explore this further in the next section.
What is the social model?¹

The key message at the heart of the 'social model' is simple:

People are disabled by the physical, social and attitudinal barriers in society, and not by our impairment or difference. As a simple example: If no stairs, and only ramps existed, then people who use wheelchairs would have a much easier time travelling around.

The 'social model' provides us with a way of understanding disability and the lives of disabled people differently. Most importantly, it allows us to understand that as disabled people, we are not a problem, or inherently less able. The problems that we face as disabled people can often be caused by the barriers that the social world puts in our way. This could be, by not thinking about our needs when designing the physical world, or by the way that other people view our impairments as limiting what we can achieve, often referred to as ‘social attitudes’.

Before the social model, the medical model defined us as ‘problems’ that needed medical intervention to be ‘fixed’, even if our disability was causing us no dangerous or painful issues. The social model shows us that society must change to include us.

What is the independent living model?

While the ‘social model’ gives us an overall framework for understanding the barriers that we face, the independent living model is a way of thinking more specifically about the way that we want to live, and our right to enjoy the same freedoms as non-disabled people.

As disabled people, our lives have often been controlled by services, family or friends who believe they understand better than us, how we should live. This can include deciding that it is better if we live in institutions or by controlling our money, even if we’re old enough, and able to make decisions on our own. Not every disabled person faces these barriers, but many of us can, and the 'Independent Living Model' helps us when we do.

What is a human-rights and civil rights-based framework?

The ‘Universal Declaration of Human Rights’ is an important document. It is an internationally recognised set of statements which describes what freedom and equality for every human being on the planet should look like.

Human-rights, and civil-rights based frameworks use the Universal Declaration as a starting point to understand the basic human rights that every person, no matter their ability, sex, ethnicity, religion, sexual orientation etc should be able to enjoy.

It is important to return to, because sometimes, when we live in a society which is so unequal, we can forget what true equality actually looks like. Human-rights and civil-rights based frameworks help us to understand what living in a more equal society would look like, and also helps us to understand how to build this society.

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Deaf and disabled people’s organisations (DDPOs) have a rich history. We grew out of the disability rights movement which was inspired by the wider fight for civil rights and social change in the 1960s and 1970s. Disabled people in the UK identified closely with struggles towards equality happening in the United States of America around ‘race’. At the time, institutionalisation meant that as disabled people, we were also excluded from enjoying the same freedom that our non-disabled family and friends enjoyed.

Life for disabled people was very different in the UK 50+ years ago. Often, we were forced to live in institutions, separated from our communities, friends and family. Institutions weren’t run with the needs and choices of the disabled people that lived there in mind, we were told when to wake up, when to go to sleep, what to do – the fundamental human right to choose how we live, and to have control over basic decisions about how we spend our daily lives was taken away from us.

It was also widely assumed that disabled people were not capable of achieving the same quality of life as non-disabled people. Most people who ran medical and social services believed these things, and a lot of the systems that were built to protect us, ended up hurting us. When disabled people started to become more politically active, we started to radically question things like:

Social exclusion – not being able to participate in society, literally being locked away in institutions.

Poverty – not being able to have a job or have control over our own finances

Discrimination – not able to participate in society because the world isn’t built with disabled people in mind.

DDPOs began to grow as an idea when disabled people formally (and radically for the time!) began to form and lead their own organisations such as UPIAS and the Liberation Network for People with Disabilities who were organising demonstrations, supporting each other through self-help groups and educating others on the social explanations for the differences between the life chances of disabled people compared with non-disabled people. They fought to bring attention to the ways that disablism was built into the structures of society.
Importantly, organisations led by disabled people started to implement new ways of thinking about disability such as the social model and independent living model. These concepts were used to challenge and rethink working practices and aims in the organisations that they ran. The first DDPOs were created with the idea that the values of wider society create inequality for disabled people and, as disabled people who control organisations, we should re-think our values and working cultures to empower, enable and respect the choices of the disabled people that we work with. This legacy has continued and DDPOs remain a key mechanism for advancing our equality, civil rights and the freedom to keep control over our own lives as disabled people.
Running a DDPO

A decade of Austerity, compounded by the Covid-19 crisis has left many DDPOs hanging on by our fingernails, for some of us, it has also prompted some creativity and diversification by pushing us to take on projects we might never have done before.

What is clear though, is that austerity has hit disabled people very hard and has eroded away our civil rights, with alarming consequences. Existing in these times is emotionally and practically draining for all of us – but this makes our work more important than ever. Our mission is vital, lifesaving and our resistance protects dignity for all people, not just disabled people.

The rise in the need for our organisations means that we must also rise to the challenge of leading and managing our organisations in the most effective way that we can. The values of a DDPO should filter through absolutely every aspect of our organisation: from strategic vision, to everyday delivery. We talk about what this looks like in practice throughout the handbook.

An incredibly important aspect of the fight towards equality for disabled people, by disabled people is underpinned by the philosophy:

‘Nothing about us, without us’

We urge you to think about who ‘us’ is in your organisation, are you involving disabled staff, members, trustees, people who use your services and the wider disabled community? Whose experience and knowledge of living life as a disabled person (lived experience) is being used to make decisions?

The important legacy that we carry forward as DDPOs today is a commitment to constantly questioning our working practices and values so that we avoid recreating the disablism that we are trying to fight. But we must also create strong value-led systems that support our work. This is what we cover in the rest of the handbook.
BEING USER-LED
What does ‘being user-led’ look like?

Being user-led is the most important aspect of a DDPO. It is vital to understand that while having a majority disabled staff team is incredibly important, it is not the only thing that makes an organisation a DDPO.

Being user-led means being clearly accountable to disabled members and people who use or benefit from our services; and this goes beyond disabled trustees. The disabled community is a diverse community, and so DDPOs need diverse systems that integrate many different voices into the way that we run, the services that we offer and our strategic priorities.

In order to be truly user-led, as DDPO’s, we must have clear systems and strategies that promote this. We have to ask ourselves questions such as:

1. Do we take service evaluation seriously? Do we use feedback to improve our services?
2. Do our mission, aims and values reflect the voices and needs of the disabled members around us?
3. How often do we consult with our members? Do our members and the wider disabled community help set our agenda?
4. When designing services or applying for funding, do we consult on design and structure?
5. Do we have values as an organisation? Does our working culture reflect those values? Do we prioritise positive experiences of our organisation?
6. Are we doing the best that we can to make people’s experience of our organisation a positive one?

Throughout this handbook, we talk about the many different ways that systems and management practices can support DDPOs to hold this responsibility. We understand that in small organisations with shrinking funds available to us, surviving in austerity is the number one priority.

It may feel that you’re not ready to do some/all of this work yet, and that is ok. It is more important to understand the strengths and weaknesses of your own organisation and to plan in time over the next few years to develop these things. We look more at this throughout the handbook.
**Representing your community**

DDPOs exist to meet the needs of disabled people. These needs are always changing, so developing your membership, getting user-feedback on services and involving a group wider than Trustees and Staff is important when making big decisions about services or strategy.

**What is co-production?**

Co-production is about involving people in decisions that affect them. At its heart, co-production exists to disrupt ‘expert’ knowledge and redistributes power, by giving people the opportunity to contribute knowledge and experiences which inform development of services that they will use.

It is an approach which recognises that we live in diverse communities and

Diverse voices and ideas are needed to create solutions that work for many different people.

**Co-production is a skill**

True co-production is a real skill and requires thoughtful planning and delivery. The process of co-production should also fundamentally disrupt power dynamics in the room.

If you struggle to think about what this means in practice, try imagining that you are planning a meeting for some important leaders of the council, commissioners or local MPs and inviting them to share their views?

What level of detail might you put in to planning this meeting? How would you treat those people? Is it different to how you think about co-production meetings? If so, why is that? What might it change about the way that you plan co-production if you thought about it this way?
Co-production Example Process

Always remember that co-production is a skill; active listening, engaging with others in a way that encourages them to participate, creating space and safety for others to speak are all inter-personal skills that grow with time and active effort. However, making sure that you are prepared is also important; below we talk about how to plan your co-production programme to get the best results!

Step 1: Scheduling

- Co-production, feedback and input meetings with other disabled people should be a regular occurrence for a DDPO. Decide how often you would like to engage: monthly, quarterly, annually?
- Schedule in these meetings as far in advance as you can, this will make it more likely that they will happen, and give people plenty of notice.

Step 2: Planning

- Take access needs into consideration when planning time, place, venue and resources that you need.
- If you cannot meet particular access needs due to budget constraints, then make it clear in your communications. This shows that you have thought about it, and also lets people know what to expect. This way they can make an informed decision about whether they can or want to come, or how to prepare themselves for coming.
- Your planning process should involve some outreach activities – think about how you can attract a diverse range of people.
- Consider carefully who in your organisation has the skills to deliver this session.

Step 3: Structuring & Running

- Inviting people into a room saying ‘tell us what you want’ is not co-production. Structure the meeting so that there are meaningful ways to engage, ask specific questions that people are able to engage with. Have a plan and structure, as you would in a workshop or something similar.
- Put thought into how you will get the best out of the people in your meeting. Consider creating a safe space, how you might encourage quiet people to talk etc.
• Try to think of different ways of engaging: some people prefer to talk, some prefer to write, it helps some people to have an icebreaker or group activity.
• What questions will you ask, and how will you make the session meaningful?
• Make sure that you have a strong system for capturing the information: will you record and transcribe; will you have someone who is taking notes?

Step 3: Reflecting

• What can be done better next time?
• Were there people that didn’t speak, why might that be?
• Did you meet everyone’s access needs?

Co-production: Integrating the feedback

Running successful consulting events and meetings is a very different skill from integrating the feedback, comments and ideas that follow into our strategies and everyday practices of our work.

Below we have included a small introduction to the sorts of things to think about when trying to plan how you might integrate the information from these sessions into your strategic planning and delivery.

Step 4: What were the key points?

• Using the notes from your meeting, identify the key issues and themes that came up.
• Share them with other members of staff present, and make that people generally agree that the key points have been identified.

Step 5: Match information with strategy

• Match those key points with your strategic objectives, think about how you might be able to turn this insight into plans for your organisation.
• Mind-map different ways that you can integrate thoughts, ideas and comments from the meeting into your work.
• Can you integrate any more formal methods of co-production into your organisation? Steering groups, systems for evaluation, information to feed into service design and strategy?
• Can you circulate and ask for any different ideas?

Step 6: Communication

• If you make any changes as a result of the outreach sessions, communicating this with everybody involved is a very important step. A ‘you said we did’ e-mail, letter or poster is a great start.
• Discuss what came out of these sessions with staff in meetings and discuss the implications in practice.
VALUE-LED STRATEGY
Why Strategise?

There are lots of different ways to describe strategic leadership and management. We can call it quality assurance, intentional leadership, systems thinking, innovation or evidence-led practice and implementation. The term ‘strategic management’ can sound and feel quite corporate, but it is actually more important for small organisations that are led by their values than any other.

In this handbook, we are referring to strategic management as:

Identifying the overall purpose of your organisation and the values that you exist to deliver, setting long-term goals that reflect your mission; and managing your people, systems and processes to meet those goals.

Thinking beyond the every-day and doing this work has many benefits:

- It can help staff to feel more motivated, because they can see how their activity is contributing to an overall approach to social change
- It can help to create common purpose across your team, making the organisation feel more effective
- It gives you a framework and a plan for achieving your mission and helps everybody keep on track with planning and delivery activity
- Your organisation is more likely to be using its resources in the best way, and using the right information and evidence to make decisions
- It can help protect you from poor choices because decisions are supported by an established, and well thought-through framework.

It also helps the people who use your services and commissioners, or funders understand what you offer as an organisation.

In the next sections, we provide a step-by-step process that should help you to think about, plan, and implement a strong strategic plan.
The table below briefly defines each stage of developing a strategic process that works for your organisation as well as giving you an idea of the activity that is associated with each stage.

Read on for further information on each of these stages below the table.

<table>
<thead>
<tr>
<th>Different stages of strategic process</th>
<th>Activities associated with stages</th>
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<tbody>
<tr>
<td>Strategic Objectives (Organisational Purpose)</td>
<td>Defining, or updating: Vision Mission Aims Values</td>
</tr>
<tr>
<td>Strategic Data Gathering (Understanding organisational strengths, weaknesses, opportunity and threats)</td>
<td>Collecting data: Organisational health assessment SWOT Analysis Staff Survey Evidence and policy research</td>
</tr>
<tr>
<td>Strategic Planning (Define activity for future)</td>
<td>Bringing everything together: 5 year forward planning</td>
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<tr>
<td>Strategic Implementation (Thoughtful project management)</td>
<td>The practical part: Creating/following process</td>
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**Feel like you don’t have time? How to make time:**

Get creative! What could you do within your organisation to make time to do this work?

- Use your senior staff meetings for bigger picture thinking
- Spend one week a year dedicated to do this work – build it into your funding strategy and bids for projects.
- Plan a strategy day, or a series of sessions to do some bigger picture thinking, make it fun and positive.
- Don’t do it all on your own – ask staff for ideas about how to fit this in within their work.
- Prioritise: what do you spend your time doing? Is there anything that you could stop doing for a while, and replace those tasks with strategizing activity?
- Don’t have time to think about it? Assign it to someone who might have time and a particular interest in thinking about these issues – use it as a growth opportunity.
**Vision, Mission, Aims and Values**

Vision, mission, values and aims are so important for any organisation. Working hard to capture these things can:

- Give us a road-map for our activity: it makes our priorities clear and makes strategic decisions easier to make.
- Help the people who use our services to understand what we do and don’t do.
- Help people understand how they can expect to be treated by us.
- Help staff to understand what we expect from them.
- Help attract job applications from people who share our values.
- Provide strategic direction; referring to them when making all new decisions can help remind us what is important.
- Help commissioners understand why we exist and what we do.

**Identifying Need**

This step is incredibly important. Identifying specific gaps in provision, or specific needs that you hope to fulfil ensures that your organisational objectives exist to solve an issue, it creates a clear relationship between the issues that you are working to solve, the work that you are doing, and the people who benefit from that work.

As a DDPO, we understand that equality for disabled people is what we are fighting for, but this covers many different areas – if you try to cover everything, then you’re not necessarily focusing on the needs of your local area, the skills of your staff or creating a strong Unique Selling Point/Proposition (USP). Doing this work will strengthen your organisational purpose, and also make you more attractive to funders.

**Vision**

Your vision statement should capture the overall change that you’re trying to create.

e.g: A world in which all disabled people have choice and control over their own lives.
Mission
Your mission statement should tell people what your organisation exists to do. It should capture your core purpose.

e.g: Using lived experience to provide better services to disabled people in Barnet.

Aims
Your aims should state the key areas of work that your organisation is focused on.

e.g – To identify and challenge discrimination faced by Deaf and disabled people
  - To use our lived experience to remove barriers faced by disabled people
  - To provide services which support disabled people to have more freedom, choice and control over their own lives.

Values
Your values should describe to people what is important to your organisation about how you operate and treat people.

e.g – To provide person centred services
  - Aim to always be welcoming and inclusive
  - Learning from our achievements and mistakes
  - work together to remove barriers experienced by disabled people
  - To be guided by the needs of disabled people

Why is it important to have clear values?
Our values make clear how we work differently, and deliver better services. Our values focus on the inclusiveness of our practice – how we remove barriers.

We did a quick online test and visited some different DDPO websites to see how different organisations talked about their work. Many of us talk about our mission and aims, but very few of us talk about our values.

As DDPOs, it is our commitment to our values that makes us special. Our commitment to the social model in practice is our lifeblood. Stating
our values, by breaking down what working in a social-model focused way is really important.

- It spreads the message of the social model in practice
- It breaks down for commissioners and funders what we do differently
- It is a guide that you can use for funding applications
- It helps staff to understand what is expected of them.

Not having values can mean...
Not stating our values can mean that there is no clear accountability within the organisation for how we deliver equality and access in our work. This could lead to us falling into putting up the same barriers that lots of other organisations fall into putting up, or just create confusion amongst staff about what working in a ‘person-centred’ or ‘social model’ way mans.

As managers, one thing that we can do to make sure that we help our staff to think about the way that they work, is to have clear values. This helps us to lead that conversations around practice and organisational culture.

Be active...
Try not to rely too much on staff to apply their own values in practice. Working on implementing your values together can:

- Make your organisation a nicer place to work
- Make your staff team stronger
- Create common purpose across the organisation, so that staff understand that you are all working towards something bigger than the organisation itself, together.

Co-producing our Organisational Objectives
As we mentioned above, being user-led is the most important aspect of being a DDPO. It is important to understand that while employing disabled staff is important, but it is not the only thing that makes an organisation a DDPO.

Being user-led means being clearly accountable to disabled members and to the people who use our services; and this goes beyond our trustees.
While having a clear understanding of our organisational vision, mission, aims and values is important. As DDPOs, we have to be asking ourselves the following questions:

- Are your vision, mission, aims and values co-produced?
- Do they reflect the needs of the disabled community around you?
- Are they currently up to date?
- Do they reflect the socio-political landscape that we live in?

If you feel that you may need to co-produce, or update your vision, mission, values and goals, our section on ‘being user-led’ can help you think about this by providing a starting point.

**Some Benefits of Knowing Your Organisation**

As leaders, taking the time to think about our organisation as a whole is very important. We list some strategic benefits of doing this work below:

- Having a clear understanding of the strengths and values of our organisation can help us to understand what we are good at. It can help us to understand projects that we can operationalise quickly, or be more competitive on because of our expertise. This is especially important because often, funding does not cover the full cost of work on projects. Winning tight bids for projects that we hold no organisational expertise is often bad for the people who use our services, our reputations and staff wellbeing. Our strengths should drive our work.

- Having an understanding of the gaps in our organisational knowledge can help us to know whether we need to buy in specific expertise, or how we want our organisation to grow. Eg: which skills do we recruit to in new staff, or new trustees? This may even help us to understand the kind of work that we should avoid, because it doesn’t make sense for the kind of organisation we are.

- This can help us brand our organisation: communicate what we do really well, clearly and concisely so that we build an organisational reputation around it. This will inevitably help us when winning funding, and being excellent at the work that we deliver.
Active Management

We know that day-to-day life as a manager in, or CEO of, a small organisation can be all-consuming. This can mean that many of our days can be spent responding to issues, managing crisis situations, attending external meetings or writing funding bids. This can leave us with very little time to do the wider work of ensuring that we are delivering our organisational vision, mission and goals. It is too much to ask of any human being to hold so many things in their mind at the same time; this is why, if we have the right systems and processes in place, it can often make our lives much easier as we do this work.

If we really want to be achieving our organisational purpose, we must go beyond simply stating our vision, mission, aims and values. Having a strategic plan that lays out the actions that we need to take, and the timeframe that we will undertake them in will help us to stay true to our organisational goals and values.

It can feel tempting to be reactive in our approach to service delivery; fitting our work around tenders or funding calls that become available – we know that often this is necessary – but this is not the only way to sustain our organisation. Actively project managing the development of your organisation is important, and in the next section we take you through how to do this.
Be led by evidence

**Gathering and using the right information**

The words ‘data-led’ or ‘evidence-led’ and ‘strategic analysis’ can sound complicated, but it simply means gathering the information that you need, in order to make informed decisions.

We have broken the information that you can use into two categories, and explore them further, in detail, in the next section:

1. **Internal Data** – relevant information that you hold, or that you can collect from people within your organisation.

2. **External data** – data from the external environment that might affect your organisation.

We will now go into further detail about how to gather and use this data to create a strategic plan which is evidence-based.
Gathering Internal Data

In this section, we give you some ideas about the types of data that you can collect about your organisation, and some ideas about how you can gather this data. Every organisation is different, so design a system that works for you. We make some suggestions here:

<table>
<thead>
<tr>
<th>Type of Information</th>
<th>How to gather / where to look</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feedback from people who use our services.</td>
<td>Systems for evaluation, measurements that capture outcomes built directly into projects and services.³</td>
</tr>
<tr>
<td>Input from wider disabled community (coproduction).</td>
<td>Regular feedback and strategic planning meetings to set priorities⁴</td>
</tr>
<tr>
<td>Feedback and ideas from Staff, Trustees and Volunteers.</td>
<td>System for recording any relevant feedback from supervision</td>
</tr>
<tr>
<td></td>
<td>Regular all staff meetings</td>
</tr>
<tr>
<td></td>
<td>Half-yearly or yearly organisational strengths review</td>
</tr>
</tbody>
</table>

**Feedback and ideas from Staff and Trustees and Volunteers**

There are many different ways for you to choose to get feedback from Staff, Trustees and Volunteers. If you would like to do this more systematically, an organisational strengths review is a great idea – we provide you with more information below and a template in Appendix 1.

**Organisational Strengths Review**

Asking staff, trustees, members and stakeholders to anonymously answer questions about your organisation can help you to get a diverse view of the strengths and weaknesses of your organisation from a diverse set of perspectives, doing this regularly, collecting data over

³ You can find more information on how to design evaluation systems in the ‘evaluation’ section of this handbook.

⁴ You can find more information on how to do this in our ‘being user-led’ section of this handbook.
time can also give you a great idea about how your organisation is changing.

The data gathered can help to inform a strategy refresh, five-year forward planning and/or strategic goals. The diversity of perspectives collected should help you to understand more about what your organisation does well, and what it could be better at. This information will give you an evidence-based understanding of your organisational strengths and weaknesses and inform your organisational SWOT analysis. An example organisational strengths questionnaire can be found in Appendix 1.

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5 See ‘organising our data’ section
Over the last ten years, there has been an overwhelming shift in what is expected from voluntary and community sector organisations. Developing the sophistication of our systems and the evidence that we use is really important. Below we talk about some ways in which we can do this.

<table>
<thead>
<tr>
<th>Type of Information</th>
<th>How to gather / where to look</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demographic data / needs analyses of your area</td>
<td>A very useful tool to use is the Joint Strategic Needs Assessment (JSNA). It provides key demographic data along with projected changes in those demographics for the entire country. This data can be supplemented by talking to colleges in your sector about their experiences of their work, and comparing notes.</td>
</tr>
<tr>
<td>Policy</td>
<td>Government policy and white papers. Overviews/analysis of policy such as from The Kings Fund, NCVO.</td>
</tr>
<tr>
<td>Best-practice</td>
<td>Benchmarking with other DDPOs and mission-led organisations. Innovation charities or think tanks such as NESTA or NPC. Social care organisations such as Skills for Care, SCIE(^6) Engaging in new ideas or new ways of thinking from thought leaders in our sector.</td>
</tr>
</tbody>
</table>

\(^6\) Not everything from organisations like this will always feel relevant, but you can pick and choose what does. Also, it also helps to understand what organisations like this feel is relevant, so that you can establish your own organisational position in relation to this.
Knowing your Community and it’s Needs

Our world is rapidly changing – social issues are changing – funding is changing, and a decade of austerity has created new social issues are arising that we are having to contend with.

This means that as an organisation, strategically it’s important know how this might affect people’s need in your areas. Having an understanding of the following external factors might help you to understand the following:

- What are the current gaps in services in your community?
- How are statutory services changing?
- How are the demographics and socio-economic make up of your community changing?

This is the sort of thing that you can learn from resources such as:

- JSNA (Joint strategic needs assessment) – you can find this by googling JSNA [insert the name of your ward, borough or area here].
- Being involved in local strategic meetings
- Connecting well with other organisations
- Healthwatch data and reports

Policy

Having a basic understanding of the local and national policy landscape that affects your organisation and the people that you work to serve is very important.

- What are the key government policies/pieces of legislation that affect your work? E.g – Care Act, Disability Discrimination Act
- Are there any policy changes coming that might affect your organisation?
- How will changes to local and national services or funding affect your organisation?
- Are there any resources/newsletters/working groups that you can join to help fill in these gaps?

Some examples

Many of us will have our own favourites, but here are some examples:
Disability News Service - https://www.disabilitynewsservice.com
DRUK - https://www.disabilityrightsuk.org
Best Practice

Best practice is considered to be ‘ways of doing things’ that are proven, or agreed to be extremely effective.

What one person, organisation or sector considers ‘effective’ will often differ from what another person, organisation or sector might. This is why, if we truly wish to be the best organisation we can be, we should be creatively weaving together insights and perspectives from lots of different places and creating our own sense of what works. This can help us to:

- Be inspired by different ways of organising ourselves, designing our services or training our staff to achieve better results for the people who use our services
- Understand where our perspectives and strengths fit with the work of wider sector
- Use our special knowledge to lead other people to achieve better results in their organisations too.

Best Practice in the Voluntary and Community Sector Specifically

Keeping up with what is considered best-practice in the VCS sector can really help your organisation. Often, as a DDPO, you might be doing a lot of things that are considered ‘innovative’ out in the world, but without the shared language or frameworks to talk about it, commissioners, funders or key decision makers might overlook your practice. Keeping up with how people are talking about innovative work will allow you to implement changes to your own practice, or communicate what you do in a more ‘fashionable’ way, helping people to understand the strength of your work. Keeping up with best practice can also:

- Increase your chances of marketing your work successfully by ‘speaking their language’.
- Help you to stay up-to-date with new developments and trends that you can use to develop your own work and strategy
- Give you a better idea about how you can provide leadership in your local area, or in your sector; if there is something that you do really well, but other organisations struggle with, you can lead the development of certain areas.

You can use benchmarks from the information gathered here in order to fill out your organisational SWOT analysis – as suggested below.
Having collected the information that we suggested above, it's also important to organise it in a way that is helpful. You may have a different system, but we suggest using this SWOT analysis template below.

**SWOT Analysis: Organising Strategic Information.**

Having collected some/all of the information above, doing an organisational SWOT (Strengths, weaknesses, opportunities and threats) analysis should help you to organise all of your data.

This should help you to understand the external and internal factors that affect your ability to achieve your vision and mission / meet the ‘need’ for which your organisation exists.

This should also give you a chance to organise your data, process it and understand how all of the information that you have fits together.

<table>
<thead>
<tr>
<th>Helpful</th>
<th>Hindering</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Internal</strong></td>
<td><strong>Weaknesses</strong></td>
</tr>
<tr>
<td>Strengths</td>
<td>1. Skills missing from the staff team that are important for your organisation</td>
</tr>
<tr>
<td>1. Skills in the staff team</td>
<td>1. Things your organisation could be better at</td>
</tr>
<tr>
<td>2. Things your organisation does well</td>
<td>3.</td>
</tr>
<tr>
<td>3. Relationships you might hold</td>
<td></td>
</tr>
<tr>
<td><strong>External</strong></td>
<td><strong>Threats</strong></td>
</tr>
<tr>
<td>Opportunities</td>
<td>1. What could happen if your weaknesses don’t improve?</td>
</tr>
<tr>
<td>1. How can you build on your skills and the things that you do well?</td>
<td>2. Are there any financial threats that your organisation faces?</td>
</tr>
<tr>
<td>2. Are there funding opportunities that you might be able to capitalise on?</td>
<td></td>
</tr>
</tbody>
</table>

Other benefits:

- You can us the SWOT analysis strategically plan your work which should save time in the long run.
• Data-driven strategy is seen as best practice, so projects are more likely to be funded, and organisations more favourably looked upon.
The process of using your vision, mission and organisational SWOT planning to prioritise areas of focus, otherwise called ‘strategic objectives’ is incredibly important. It helps break your wider vision into smaller areas of focus, and helps you to put steps in place, which help you to achieve your goals.

Below, we have compiled an infographic to help you to identify your strategic objectives; using your SWOT analysis from the previous section, which helps you to bring together information about the internal and external factors that influence your ability to achieve your vision and mission, you can think about the questions that we have posed below. This will help you to prioritise key areas to focus your activity on, that help you to meet the ‘need’ that you exist to fill.

1. Consider your Organisational Vision and Mission
2. What need exists in your community?
3. Consider all internal data: organisational strengths and weaknesses
4. Consider all external data: policy and funding situation
5. Now decide, what are the areas that you will focus on?
### Strategic Objectives

Areas of focus, or a programme of activity that works to meet your vision and mission. This should be directly linked to your ability to meet the need that you exist to fill in a way that builds on strengths as an organisation. This programme should also have actions that focus on developing your weaknesses as an organisation, and takes into account external and internal data listed above.

<table>
<thead>
<tr>
<th>Questions to ask:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>What activity can you focus on that will make the biggest difference to your community?</td>
<td>How do organisational strengths help us to achieve this?</td>
</tr>
<tr>
<td>(Areas of focus)</td>
<td>(What to build on)</td>
</tr>
</tbody>
</table>

Some examples of strategic objectives might be:

- Focus on developing a programme of activities focused on leadership development for young people
- Engage in practice development activity across the sector
- Improve co-production processes.
- Strengthen organisational leadership to meet the demands of our changing social and political world.
- Develop staff management process to strengthen value-based practice across the organisation.

Identifying areas of focus (strategic objectives) is important because it is the first step in implementing a plan or programme of activity directly linked to achieving your overall mission and goals.

Having a long-term strategy which identifies strategic objectives allows you to project manage the delivery of your vision, mission, aims and values. It gives your organisation a structured, and logical plan for meeting your organisational goals.
Strategic objectives work best when they have measurable goals attached to them and have an organisational project plan for implementation dedicated to them too. You can use the logic model system below to plan an overview for each organisational objective.

**The Logic Model**

<table>
<thead>
<tr>
<th>Rationale</th>
<th>Input</th>
<th>Activities</th>
<th>Outputs</th>
<th>Outcomes</th>
<th>Indicator</th>
<th>Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Why will the problem not go away if things are left as they are?</td>
<td>Resources required to achieve the programme objectives</td>
<td>What is delivered to the recipients?</td>
<td>Products of activities, the measurable or quantifiable results of your proposal</td>
<td>What are you trying to achieve in short and medium terms?</td>
<td>How will you measure whether or not you have achieved your outcome?</td>
<td>Long term intended effects</td>
</tr>
</tbody>
</table>

The logic model – example above – is increasingly used to plan organisational activity. It helps us to think from the start, about why we are doing something, what we will do, how we define success, how we measure this success, and what we hope the longer-term benefits of this work will be.

We may be more familiar with SMART (Specific, Measurable, Achievable, Realistic and Timely) goals, but the logic model system is a far more sophisticated way to organise and plan around our strategic objectives. This is because it includes a more sophisticated way of linking purpose, activity, measurement and impact.

Once you have completed a logic model for all organisational objectives, you should create a project plan for the implementation of each objective. Each organisation will have its own project plan templates, but we include some basic principles below:
Project Plan Principles:

- Define key tasks (deliverables) that you need to complete to achieve your goal
- Set a timeframe for completing each task
- Decide who is responsible for each task
- Design a process for tracking deliverables, KPIs or activity
- Agree how you will define success
- Decide how you will collect this data

We explore more on the last two points in our next section on evaluation.
EVALUATION
Why is strategic evaluation important?

Evaluation has traditionally been something that is a neglected feature of project planning and delivery. Often tagged onto the end of project work, or seen as an unnecessary addition; managers across the voluntary sector can sometimes ignore how useful it can be. Without a system for strategic evaluation, it can sometimes be hard for us to know or prove whether our work is having its intended effect, or whether our values are experienced by the people that we work with.

Historically, value-led organisations have sometimes fallen prey to assuming that everybody experiences their organisation, in the way that they intend. That the values that are implicit within the organisation, are experienced by everyone. This has not historically been the case, and can sometimes cause damage, it is, therefore, very important as a user-led organisation, to be committed to systematically evaluating the way that we work, and making the changes required based on feedback.

Quality Management

Quality management is a process of getting the information that we need, in order to make good decisions. We have spoken about this at length already, and sometimes referred to this as strategic management. We wanted to include this section, and talk about quality management specifically however, because this language is often used in a social care or statutory context.

Quality management consists of:

1. Setting criteria (strategic objectives/KPIs/outputs and outcomes
2. Getting information (Internal/external data)
3. Analysing this data
4. Judging how to respond to what this data tells us
5. Putting a plan in place for responding

If any part is missed out, this process does not work.

Key Questions:

1. Does your organisation deliver on what it says it will?
2. Is it good enough?

Quality does offer us a useful way of thinking about our practice, below we explain how.
Key Terms:

1. Quality Assurance
2. Quality Control

**Quality Assurance** – quality assurance is all about maintaining the desired level of quality in a service. This refers to the systems and processes that you have in place to ensure that your organisation is delivering the right outcomes for clients, in the right way. Quality assurance is all about how the values of your organisation are implemented and how outcomes are achieved for clients.

**Quality control** – quality control is all about the processes that you use to review and evaluate the quality of your services.

To put it another way: If the correct controls are in place you can know for certain that the actual results have been achieved by any of the work that you deliver on. This is because the results have been checked with your customers.
Revisiting the Logic Model:

<table>
<thead>
<tr>
<th>Rationale</th>
<th>Input</th>
<th>Activities</th>
<th>Outputs</th>
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<td>How will you measure whether or not you have achieved your outcome?</td>
<td>Long term intended effects</td>
</tr>
</tbody>
</table>

Key Definitions:

**Input**
Input refers to the resources that we put in to something. This can include staff time, money, stationary, desk space, room bookings – everything that you will need to do your activity.

**Outputs**
Output is a measure of activity. It is meant to record what you do, how many times and with how many people.

**Outcomes**
Outcomes refer to what your work should achieve; what is the change for the individual(s) that you are working with?

**Indicator**
The thing that you will measure to know whether you have achieved the change that you intend to achieve

**Impact**
The long-term impact of achieving positive outcomes for the people that you work with on the wider community.
Evidence led improvement

The theory behind strategic change management is simple – but building this into our systems can feel time-consuming. There really is no quick fix for this. All we can say, is that it is an absolutely key principle for any organisation that wants to be consistently growing and improving its delivery.

Below we list the basic steps involved in evidence-led improvement. You can use all of the data that we have suggested collecting above, and follow this process to work towards achieving evidence-led change.

Building on our strengths

1. What are we doing well?
2. How can we do more of this?
3. How can we communicate what we are doing to build our profile?
4. What is our plan for all of the above?

What could we be doing better?

1. What needs improvement?
2. What is our plan for addressing this?
3. What extra resources do we need to do this work?
4. What is our plan for all of the above?
PEOPLE / STAFF MANAGEMENT
Creating Common Purpose

The importance of Creating Shared Purpose

As a manager, supporting your team to be cohesive can be a really important part of leading your organisation. This doesn’t mean trying to control how they work together, which we don’t often have any power over. It does mean sharing a common understanding of how the organisation works, and making clear what you are all working together to achieve. You can do this by:

- Re-visiting and discussing your vision, mission, aims and values
- Discussing if they are still relevant
- Discuss how you can better implement them
- Ask if staff feel the organisation is true to its goals

Co-production isn’t only for members, involving staff is an important part of DDPO practice, especially for a value-led service. The added benefit is that it also makes for a better and more empowered workforce.

As managers, we all have different approaches to management. In this handbook however, we are 100% advocating that as a manager or leader, our job isn’t to magic all of the answers to the issues that our organisation might face, on our own. It is to work with our staff, board, and members to help find solutions to these things together.

True leadership, like true co-production is about harnessing the skills of your staff (the expertise that you employed them to use) together with yours.

Co-production with staff

As DDPOs, we know how important it is for people to feel involved in decisions that affect them. We don’t always apply this to our staff when making management decisions.

What is it that makes a team feel like a team, and not just a bunch of individuals working in the same place?

Relationships and friendships are one important aspect of working life being a positive experience for most people. But having a sense of purpose, feeling supported, included and working towards a common goal is also very important. Coproduction should lie at the heart of everything that a DDPO does, but as a new manager, or even an experienced manager it can be difficult to know how to make time to co-produce organisational strategy with staff and members. It can also
be difficult when less experienced staff lack the experience to understand the practical limitations of a small organisation.

You must of course judge this by your own capacity and personality of your team, but co-producing can be a great way to support the creation of a common purpose across your team.

Top Tip: The One Culture Rule

The ‘One Culture Rule’ is important. It means that any values within the organisation that apply to the treatment of the people who use our services, must also apply to the treatment of colleagues. Do not allow multiple cultures to develop within your organisation. The more we actively and deliberately think about how we treat our colleagues as well as our clients and members, the happier place our organisations are to be in.
Key Requirements

An extremely helpful way to think about employee wellbeing is to consider Maslow's Hierarchy of Need:

<table>
<thead>
<tr>
<th>Maslow's Need</th>
<th>Examples that might appear in an organisation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physiological</td>
<td>A living wage that enables people to have food shelter, clothing etc.</td>
</tr>
<tr>
<td>Safety</td>
<td>Safe working conditions and clear work procedures to reduce stress and anxiety. Feeling supported by managers, and not unsafe or exposed.</td>
</tr>
<tr>
<td>Social and Belonging</td>
<td>Positive work relationships, successful team-work and work social events to encourage team building.</td>
</tr>
<tr>
<td>Esteem</td>
<td>Appraisals, supervision and other achievement recognition programmes. A sense of possible progression / promotion</td>
</tr>
<tr>
<td>Self-actualisation</td>
<td>Delegating challenging and stimulating responsibilities to staff. Leadership development. Personal development and learning support.</td>
</tr>
</tbody>
</table>

There are lots of flow diagrams and charts that have been developed to consider the needs of people in the workforce. We thought that using Maslow was great, because you can adapt the categories to decide how they apply in your organisation. For example, not all employees will value friendships with their colleagues, and also not everyone will be able to gain a promotion. So how do you creatively fulfil the basic needs of different members of staff within the limitations of your organisation? Maslow doesn't give us all the answers, but gives us a structured way to think about finding a solution. How can you provide belonging within an organisation where not everyone is friends? How can you work on developing staff members in different ways?
Good management starts with well thought out recruitment. Our people are our biggest asset, and taking the time to recruit thoughtfully is well worth every second of the work. Given that lived experience of disability itself doesn't guarantee an understanding of how to use one’s experience or capacity to turn that into good practice, recruiting thoughtfully is important.

**Advertising Jobs**

Decisions on how to advertise and what to specify in job descriptions might seem simple, but a well thought out advertising strategy and application pack can make all the difference.

If you find that you aren’t getting many applications from disabled people, or not reaching people with the skills that you need, what can you do? Consider where your target audience will be most likely to see the advert.

Common examples might be to recruit through websites such as charity job. But you can also:

- Headhunt or reach out to applicants via LinkedIn
- Use organisations such as Inclusion London and NSUN to circulate recruitment information
- Post advertisements on twitter, or send an e-mail out to all of your members
- Think about where to recruit for what kind of role: for junior roles you might want to go wider – recruit via Indeed, or for more senior roles recruit on the Guardian website.

**Job Adverts**

Take the time to write a generic job-pack that you can use for all recruitment. This will include:

- Information on your organisation – types of services you run etc.
- Vision, mission, goals and values, some information on strategic objectives
- Description of how the organisation will develop in the next few years
- Employee benefits.
Person Spec and Job Description

It is really important to consider what kind of person you need; not just in experience and knowledge, but also in temperament and attitude to work.

Attitude to work
Are you hiring a project manager to operationalise a project that your organisation has very little experience of? If so, seriously thinking about how independent they are, and how creative a problem solver they are will be important. On the other hand, if your project is well established, and you need someone who is great at following process, this might possibly require a different temperament and set of skills.

Taking the time to think about this can really affect the success of your hiring process, and your project work in turn.

Values and working practices

Recruiting to your organisational culture can transform how people experience your work. Consider the behaviours that bring your values to life; list your these in your person-specification.

Job Title

It may sound simple but putting ‘peer’ in the job title means that you are more likely to get applications from disabled people. We have found that the quality of job applicants that we get by doing this are usually of a higher standard than normal health and social care roles.

Legalities

When some of us started as managers – we were told by certain stakeholders that it was illegal to save a job role for a disabled person. It is not. Due to employment inequality for disabled people, there does not need to be an occupational requirement for advertising, you can save a job specifically for a disabled person simply because they are disabled. The Employment Statutory Code of Practice tells us (See: 12.32, page 169) ‘it is not unlawful direct disability discrimination to treat a disabled person more favourably than a nondisabled person. This means that an employer, if they wish, can for example restrict recruitment, training and promotion to disabled people and this
will be lawful”.

**Accessibility**

Beware of inadvertently including exclusionary requirements such as ‘will need to drive’. Think about the requirements that you really need for the role and what you might be able to achieve with access to work.

**Application Form**

Asking candidates to fill out application forms can sometimes be better than just a CV and Cover letter. This way you are able to ask questions that give you insight into candidates’ specific knowledge to the role and how they will use their personal experience to inform their work. Below, we have included some example questions from the job application for a peer mental health role.

1. Experience and understanding of the barriers that people with mental health issues face. Please provide a brief overview of your experience and understanding of the barriers that people with mental health issues face, in no more than 200 words, drawing on your own experiences as appropriate. Please do not exceed the word limit.

2. Supporting Statement: Please give details of your relevant skills, experience and knowledge in the following areas, whether gained in a paid or voluntary capacity. Please ensure you refer to the job description and person specification. Please continue on up to TWO additional pages if necessary. Please talk about: Experience of mental health issues and recovery, and the insight this has given you into opportunities to improve mental health services.

3. Please outline your understanding of independent living philosophy and the social model of disability.

It’s always imperative to ask about access requirements for interview in the job application, or most definitely when you’re inviting people to interview.

**Job Interview**

The questions that we ask at interview are key. Not only do they allow us to understand people’s skills to do the job, but they can also give us 

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7 From Employment Statutory Code of Practice
an indication of people’s relationship with their experiences. It gives us a chance to understand how self-aware people are, whether or not they are able to extrapolate from personal experience and apply this in their work. The following questions are examples of the sorts of questions we could ask to ascertain some of this information.

- How would you use your lived experience to inform this job role?
- What causes you stress and how do you manage this?
- What considerations did you have to weigh up before applying for this role?

Be honest with all interviewees about your working culture, and what you expect from your staff. Giving them the information to reach an informed decision about whether or not they come to work with you is key to long-term success.

Look after and communicate with all applicants, one day they maybe just the person you need.

When it comes to appointing staff, the systems, judgements and decision-making tools that you use to help you decide who to employ in any role will be specific to you and your organisation. Below we have included some wisdom from peers that may be helpful to you in making your decisions:

**Appointing**

- “To employ somebody in a peer role, you need someone who has a basically positive attitude to life. Someone who can acknowledge that life can be hard, but can use their experience to come up with steps and strategies that lead to a better life”

- “Whether we like to think about it this way or not, the life-stories and the way that our staff talk about and understand disability is the narratives that we propagate as an organisation. We have to be mindful of what we’re putting out into the world via our staff”

**Ask for and get references – verify sources**

“I had a situation once where someone asked me not to go to their past employer for a reference because their employer hadn’t understood their disability. I then had a tough time with this person. Sometimes there will be real cause not to have references from people’s past
employers, but there is a fine line between protecting yourself and giving people a fair chance". 
Access to work

- Where possible, access to work applications can be made less complicated when an application is made before an employee starts work. This can avoid questions that focus on how an employee has coped in their role up until now.

- It can be useful when dealing with access to work to be really organised before you call them. Be clear on their criteria and on the support needs of the staff that you’re applying for. This way you have the information that you need in order to ask the right questions.

- When applying for access to work for staff with Learning Difficulties this can be tricky. Some of the key elements of support required (such as making sense of things) is characterised as job replacement and can only comprise a maximum of 20% of support time. Review this criteria carefully when making an application, and make sure you capture all elements of support that could be characterised as job support.

Some useful sources for information on access to work can be found below:

https://www.disabilityrightsuk.org/access-work

http://www.clearkit.co.uk/reasonable-adjustments/access-to-work/
A well-managed and meaningful induction process can be a great relationship and team-building tool.

Alongside your normal induction checklist (health and safety information, policies and procedures etc) consider how you can support a feeling of being welcome, give new staff meaningful and useful information about your organisational culture, values and expectations. We offer some suggestions here:

**Have a welcoming tradition**

- Have tea and cake to welcome your newcomer
- Have a ‘bring and share’ lunch in their first week
- Have a senior manager / CEO have lunch or tea with the person to get to know them

**Useful information about the organisation**

- Introduction to DDPO history
- Overview of the social model
- Vision, mission, values and goals
- An overview of services
- Organogram
- Organisational context
- Some insider tips / expectations
- Tips for making the most of your managers
- The language that you use as an organisation
- What to do if you’re struggling

**Have a ‘getting to know’ you supervision – example attached in Appendix 3**

- Understand how things are going – what’s going well and what could be better
- Understand more about people support preferences
- Set goals that the person will work towards achieving
Why is supervision important?

- Building awareness – supervision is a chance for reflection for a member of staff and their manager.
- Project management – revisiting project plans and outputs to assess activity together can help to keep projects on track and identify any issues.
- Being supported – Having the feeling of someone more experienced to support us with issues that we don’t know how to solve ourselves.
- Touching base – Supervision is a dedicated space to check in with staff and see how they are. Our work can be very emotionally demanding, and so checking how much work staff are doing, and how they are feeling is very important.
- Achieving potential – Having 1-1 meetings with more experienced managers who act as champions and help with achieving personal development goals can be invaluable in working with staff to achieve their potential.
- Feeling appreciated and recognised – Many of us do this work to make a difference, having our contributions recognised and validated is often very motivational.

Supervision should be:

- Supportive & Safe
- A place for openness and honesty
- An opportunity to recognise people’s strengths and successes
- A chance for problem solving and becoming ‘unstuck’ with issues that might be too hard to solve on your own
- A space to address and plan professional development
- A way to talk about any possible issues: eg. Staff working too hard (burnout), staff feeling unmotivated (possibly bored or feeling stagnant) etc.

Supervision Template
We have included a supervision template in appendix 2.

Senior Staff Supervision
The person who most commonly misses out on supervision is the manager, or CEO and this is of particular importance as we carry a lot of weight on our shoulders.
Supervision can be set up successfully with the chair of the Board, however for many this relationship is already busy with other concerns and also the Chair may not have the appropriate skills. In these circumstances alternative arrangements are needed - using an external person or setting up a peer supervision system with another organisational manager can be a great second option.

Managers should seek to be grounded and present – acknowledge and seek to occupy the space of being a helpful resource (as opposed to – ‘I don’t have time for this’), and supervision helps everyone with this process.
Parting Words

By no means have we covered absolutely every piece of information about managing a DDPO that we could possibly cover in this handbook, nor is it right to.

What we have tried to do, is capture the core capabilities that lie at the heart of translating our deeply held ideals as a sector, into a management process that strengthen our organisations; that allow us to communicate our value, develop a shared language that allows us to compete with other charities and show ourselves to be leaders in value-based practice that we deserve to be.

In truth, it is impossible to write a manual which tells you everything you need to know – so much of what makes a good manager is about good judgement; this is often the result of hard-won lessons. We all make mistakes, and we must all live through them, reflect on them, and learn what we need to from them – this is work that nobody else can do for us.

We can only hope that we have provided a road-map that helps us to understand how to strengthen your strategic approach to achieve your vision, mission and values.

Good luck!

Caroline, Richard and Aman.
Appendix 1: Organisational Strengths Review

Example Questionnaire:

Instructions:

The best thing to do, us to upload these questions into an online questionnaire programme such as Survey Monkey. Each question should have the following options:

Strongly agree, Agree, We are trying and making progress, We are trying and not making progress, Disagree, Strongly disagree, I don’t have that level of knowledge about the organisation, I don’t understand the question

Leadership

1. Our vision, mission and goals communicate our objectives and what we hope to achieve.
2. Our organisational values communicate how people can expect to be treated by us
3. I experience the majority of staff working by our values
4. Our board is effective
5. Our managers and senior staff have strong leadership skills
6. Our management team have a clear strategy for the development of our organisation
7. Our strategic function is prepared for current and future challenges to our sector

Finances and Funding

1. Our funding is secure
2. We have funding from a range of places, not relying on one big source.
3. The funding that we apply for always sits within our organisational strategic goals
4. We proactively manage our finances, spotting any issues before they happen
5. Our financial system meets our needs
6. The finance and funding expertise in our organisation meets our needs
7. We have an excellent financial system in place which fully meets our needs

Service and Project Management

1. We generally receive the correct referrals for the work that we do
2. Our organisational values are built into the way our projects are managed
3. Our systems (planning templates, project plans, paperwork, escalation policies) meet our service and project needs.
Operational and Organisational Management

1. We regularly review our performance and take appropriate action to address any weaknesses
2. We are fully committed to learning from experience and to improving its performance and services
3. We produce strong evidence of the impact of our work

Comms and Marketing

1. We regularly communicate updates and changes to staff internally in an engaging and accessible way
2. We regularly communicate updates and changes to the people who use our services in an engaging and accessible way
3. We market our services to stakeholders in an accessible and effective way
4. We use social media well
5. We use our expertise and communications skills to influence the way that other organisations work

Staff and Volunteers

1. We have enough staff to do the work that we need to do
2. Our staff have the experience they need to do their jobs well
3. We have good systems in place for recruiting, managing and training staff
4. We have enough volunteers to do the work that we need to do
5. Our volunteers have the training and experience they need to do their jobs well
6. We have good systems in place for recruiting, managing and training volunteers
7. Our policies and procedures are complete and up-to-date
# Appendix 2: Supervision Template

## Reflective Practice

<table>
<thead>
<tr>
<th>Overall review of the month</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Tell me about your month, what has it been like?</td>
</tr>
<tr>
<td>• Tell me a little about what you’ve been working on</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Successes</th>
</tr>
</thead>
<tbody>
<tr>
<td>• What has been going well?</td>
</tr>
<tr>
<td>• What are you happy with?</td>
</tr>
<tr>
<td>Make sure manager gives feedback about successes through their eyes.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>What could have been better?</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Is there anything that you feel could be better?</td>
</tr>
<tr>
<td>• Is there anything you’re unhappy or worried about? (Conversation should eventually be solution focused).</td>
</tr>
</tbody>
</table>

## Project Management

<p>| Re-visiting Actions from Last Meeting |</p>
<table>
<thead>
<tr>
<th><strong>Paste the actions from last month into this box to go through this month. Review what has been completed and what is outstanding.</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Organising the Month Ahead</strong></td>
</tr>
<tr>
<td>Go through with staff what they plan to work through over the next supervision period.</td>
</tr>
<tr>
<td><strong>How might I be able to help?</strong></td>
</tr>
<tr>
<td>Talk to staff about whether they feel any guidance is required, or if your knowledge/input might be helpful in tackling an issue.</td>
</tr>
<tr>
<td><strong>Personal Growth Review</strong></td>
</tr>
<tr>
<td><strong>Agreed Staff Goals (For reference)</strong></td>
</tr>
</tbody>
</table>
Manager Notes/Manager Goals for Employee

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>xx</td>
</tr>
<tr>
<td>2.</td>
<td>xx</td>
</tr>
<tr>
<td>3.</td>
<td>xx</td>
</tr>
</tbody>
</table>

Reviewing Progress on Staff Goals

- How do you feel you’re progressing on your own personal goals?
- Is there anything we can do to work on those in more depth?
- Is there any training you’d like to do/things you’d like to add here?
**Appendix 3: Getting to know you template**

**Introduction: Getting to know you**

Note: Make sure that you notify the member of staff beforehand about this meeting and ask them to prepare, a template e-mail can be found in this folder.

**Purpose of this meeting is:**

- for us both to understand how to work better with one another
- for me, as your manager, to understand the goals that you’d like to work towards so that we can work as a team on your development at work
- to find out a little bit more about you

**Catch-up**

<table>
<thead>
<tr>
<th>How are you finding everything so far?</th>
</tr>
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<tbody>
<tr>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Successes</th>
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<tbody>
<tr>
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</tr>
<tr>
<td>What are you happy with?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>What could have been better/improved?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is there anything that you feel could be better?</td>
</tr>
</tbody>
</table>
| • Is there anything you’re unhappy or worried about?  
  (Conversation should eventually be solution focused). |
|-----------------------------------------------------|

**Support Preferences**

<table>
<thead>
<tr>
<th>Is there anything you would like me to know about working with you?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Talk to the member of staff about their preferences, how they like to be supported, any struggles that they might anticipate and how you can work together to solve these.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>What I’d like you to know about working with me:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Think about your own working style, fill this box in with all the things you’d like your staff to know about you and talk them through these things at the meeting.</td>
</tr>
</tbody>
</table>
Professional/Personal Development Goals

“We would like Inclusion Barnet to be a space where staff thrive, feel challenges and valued at work. This is why I’d like to ask how we can work together on your own personal development. Let’s think together about some personal/professional goals you can work towards”

<table>
<thead>
<tr>
<th>Agreed Staff Goals (For reference)</th>
</tr>
</thead>
<tbody>
<tr>
<td>4. Xxxx</td>
</tr>
<tr>
<td>5. Xxxx</td>
</tr>
<tr>
<td>6. Xxxxx</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Manager Notes/Manager Goals for Employee</th>
</tr>
</thead>
<tbody>
<tr>
<td>4. Xxxx</td>
</tr>
<tr>
<td>5. Xxxx</td>
</tr>
<tr>
<td>6.</td>
</tr>
</tbody>
</table>

**Skills Required from Team:**

- Creative Problem Solving: If we can’t think of a solution, what are the other methods or resources that we can use to help us solve our issue? Can we think differently about what we are struggling with to help move us forward?
- Systematic Thinking: What are the logical steps involved in this process?
- Operational Expertise: How can we take the information that we have above, and use our own to think about the actions that we have to complete?
- Isolating the issue: Break the problem down and try to understand what exactly it is that we are struggling with.
- Asking for help: How can we best use the skills and expertise of those around us to help