

# BUSINESS STRATEGY

2024-2027

forward





forward

[www.forwardtrust.org.uk](http://www.forwardtrust.org.uk)

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# Vision, mission, beliefs, values

## Who we are

Forward Trust is a social justice charity that helps thousands of people recover from addiction and mental health problems, leave behind crime, and find jobs, homes and a sense of belonging.

We campaign to change public attitudes and policy so that people, who are often written off by society, can access support that transforms lives. We are proud to be the UK's leading addiction recovery charity, improving public awareness and understanding, demonstrating the potential of people to recover and rebuild their lives.

## Our vision

Our vision is that anyone – whatever their history or circumstances – gets the opportunity and support to live a positive life that fulfils their potential, and to inspire others to follow the same path.

## Our mission

We exist to help anyone impacted by addiction, crime, homelessness, mental health or long-term unemployment to turn their lives around and achieve mental and physical wellbeing. Our services work to inspire the belief in a better life, and support people to achieve that goal. We campaign to build awareness so that more people feel able to ask for help in a society that believes in the power of second chances and long-term recovery.

## Our 9 core beliefs

- 1 Addiction or offending behaviours are often rooted in adverse childhood experiences – neglect, abuse, and trauma – or mental health problems in adulthood.
- 2 Poverty, and lack of positive opportunities or networks, are also significant factors in the development of drug or alcohol addiction, or criminal lifestyles.
- 3 Anyone, irrespective of their past or current circumstances, is capable of confronting their problems and challenges in life and, with the right support, making lasting and positive changes.
- 4 Change and recovery depend on people taking responsibility for their own actions, and confronting negative behaviour patterns.
- 5 Instilling self-confidence and self-belief in people who have become accustomed to alienation and disappointment is core to enabling change.
- 6 Change and recovery are grounded in human connection and community, with family, friends and loved ones involved wherever possible, and opportunities provided for people to build self-respect through making positive contributions to the communities in which they live.
- 7 People who have succeeded in turning their lives around are important role models and sources of support and inspiration for others, as peers, educators and members of staff.
- 8 The benefits to communities and society of enabling change and recovery are long-term and wide-reaching.
- 9 Wider understanding of the causes of addiction and offending will reduce the prejudice and shame that stops people asking for and getting help.





“For the first time in a long time, I feel that my life is going in the right direction and if it wasn't for Forward's help and support I don't think I'd be where I am today.”

Forward Service User

## Our values

We deliver all our services with compassion and without condemnation.

We are a safe place to start a changed life and we will be there for people for however long it takes, because change and recovery happens one day at a time. To do this we:

- ▶ Do not judge or condemn people, recognising that many who come to us have been accustomed to stigmatisation and marginalisation.
- ▶ Empower people to make their own positive choices.
- ▶ Stay with people throughout their journey, connecting for a lifetime, though we also respect people's wishes when they want to move on.
- ▶ Treat everybody equally with dignity, compassion, and empathy.
- ▶ Create an environment where people have the freedom to be themselves without fear or judgement.
- ▶ Recognise the importance of family relationships, positive or negative, in people's lives (and also the importance of directly supporting family members). We believe how a family is defined is up to the individuals involved, and that we all hold our own unique version of what family looks like.
- ▶ Believe that the principles of honesty, self-care and self-improvement are universally relevant – to us as volunteers, staff, and Trustees, the same as our clients.



# Maintaining our legacy

The charity now called Forward Trust was founded in 1991 by a small group of committed volunteers. They were motivated by a determination to make treatment and recovery from addiction available to the most marginalised people in our society – to show compassion for their situation, and belief in their potential.

For over 30 years, successive groups of Trustees, staff and volunteers, have worked to deliver on these guiding principles – originally through focusing on 12-step addiction recovery programmes for prisoners, and over the years expanding the range of interventions to addiction treatment in the community, employment, housing, mental health, and reducing reoffending services – delivered

in prisons, residential centres, and communities. While our services have different target groups and delivery models, they are all designed to help people overcome their problems, develop as people, and prosper as citizens.

And those people who have turned their own lives around are the best role models to inspire others – our services rely on their experience and expertise to be authentic and effective – we are proud that over a third of our employees and volunteers have lived experience.

The current Forward Trust leadership see it as their responsibility to maintain this legacy – targeting our support to those who are most in need and making the power of lived experience central to our service models, and workforce strategies.

## Another life is possible

The people we support face unprecedented challenges. Following the pandemic the UK's addiction crisis has spiralled, impacting more people than ever before. People seeking a way out from cycles of crime face limited support, resulting in stubborn reoffending rates, and growing numbers of people are trapped in unemployment or low-paid work. It doesn't have to be this way.

Based on our proud history, our strategy looks to find better ways to change the path set out for the people we help. We are positive and ambitious for the people we support. We are determined that our work will make lasting changes for people, families and communities impacted by addiction, offending and unemployment – so that everyone has the opportunity to change their lives for the better.

### We will do this by:

- Reaching more people who need our help.
- Delivering services that enable people to transform their lives.
- Changing attitudes and improving understanding in the media and government.
- Investing in our staff to consistently deliver high-quality provision.
- Inspiring more people to support us so we can go the extra mile for the people we help.
- Being inclusive and ensuring our staff reflect the communities we service and everyone living in them are able to access our help.
- The pages overleaf set out how we will do this to the best of our ability in the next 3 years. >>>



# Strategic aims

Our 3-year strategy will progress the delivery of our vision, mission, beliefs and values by:

## Aim 1

### Reaching more people who most need our support

23/24 BASELINE:  
25,000  
clients

3-YEAR TARGET:  
40,000  
clients

#### Achieved by:

- Retaining and winning service contracts, selected on the basis of:
  - Reaching the most vulnerable or under-served groups.
  - Targeting geographies that build on our existing footprint while also focussing on places with disadvantaged neighbourhoods.
  - Delivering services whose design allows meaningful interaction, enabling change and progress, delivered both digitally and 'in person'.
- Fundraising for activities that promote our mission, but are not supported by contract income.
- Entering into mergers and acquisitions that enable us to extend our mission.

## Aim 2

### Maximising the number of clients who make transformational changes

23/24 BASELINE:  
6,250  
clients at *Develop* stage\*  
2,500  
Forward Connect  
members (*Prosper*)

3-YEAR TARGET:  
8,750  
clients at *Develop* stage  
5,000  
Forward Connect  
members

#### Achieved by:

- Delivering services that offer progression through our 'stages of change': **Pause > Engage > Develop > Prosper**



- Ensuring high-quality service provision and that all our service users receive support and interventions that are appropriate, effective and inspirational.
- Motivating service users through lived experience role models.
- Supporting family connections and relationships, including direct support to family members.
- Offering life-long peer support and access to recovery communities (Forward Connect.)

## Aim 3

### Raising awareness of Forward's work and beliefs among policymakers and the public, changing perceptions and influencing policy

23/24 BASELINE:  
10%  
increase in web page  
views

3-YEAR TARGET:  
25%  
increase in web page  
views

#### Achieved by:

- Marketing (and 'thought leadership') to commissioners, partners and other stakeholders.
- Public-facing campaigns, including in partnership with other charities and organisations.
- Effective Ambassador and Influencer programme.
- High levels of engagement with digital communications, generating debate and building online communities.
- Media profile and influential voice in addiction, criminal justice and employment space.
- Shaping public policy responses to improve outcomes for our clients.
- Supporting an inclusive and positive work culture through our internal communications.

\* The Develop stage indicates the progression of an individual's personal development and recovery through structured and intensive programmes, developing new skills and knowledge, and making new positive connections.

# Service areas

We provide our service in many different ways, in a variety of settings, funded by different government streams.

No matter what labels are put on them, our service users are all looking for the same things that we all want in life: health and wellbeing, positive relationships with family and friends, social connection, safe and comfortable homes, and enjoyable jobs. Taken together, all our services are designed to deliver these outcomes.



CLIENT'S PRESENTING ISSUES	AREAS OF INTERVENTION	SPECIFIC SERVICES (AS AT 23/24)	OUTCOMES
<p>crime gambling harm mental health homelessness addiction unemployment substance misuse</p>	<p>Substance misuse, addiction &amp; mental health</p> <hr/> <p>Rehabilitation of offenders</p> <hr/> <p>Employment and accommodation support</p>	<ul style="list-style-type: none"> <li>• Integrated clinical and psychosocial treatment for substance misuse (adults) in prison and community settings</li> <li>• Mental wellbeing in prisons</li> <li>• Reconnect (helping prison leavers access health services)</li> <li>• Recovery groups/programmes</li> <li>• In prison and community settings</li> <li>• Support for families and young people</li> <li>• Residential rehabilitation</li> <li>• Recovery housing</li> <li>• Aftercare and recovery communities</li> <li>• Commissioned Rehabilitative Services</li> <li>• Accommodation for people who have been in prison, and people in recovery</li> <li>• Family and wellbeing support in prison</li> <li>• Careers information, advice and guidance in prison</li> <li>• Vocational training and adult education in the community</li> <li>• Social enterprise and support</li> </ul>	<p>Health &amp; wellbeing</p> <p>Jobs &amp; careers</p> <p>Homes</p> <p>Positive relationships</p> <p>Social connection</p>

# Business model for 2024-27

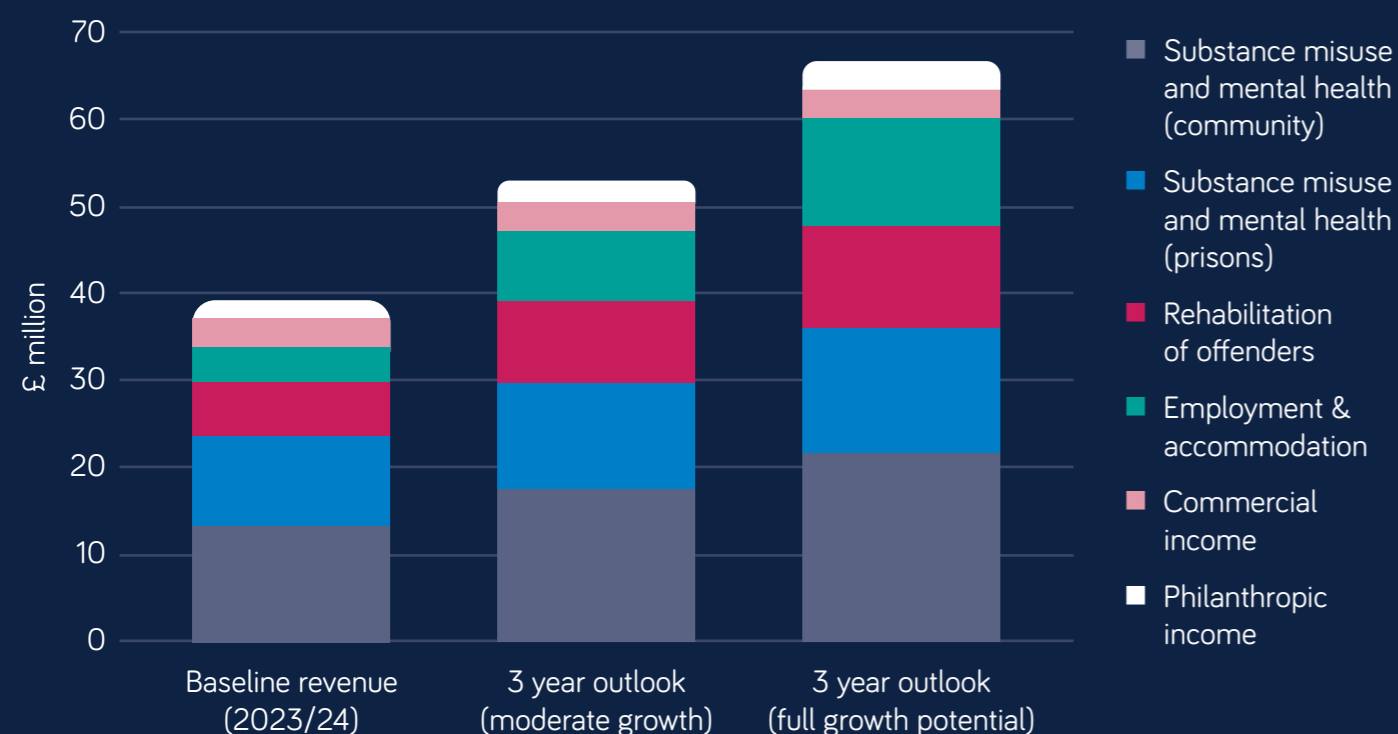


## 1. Growth through business development

We can reach more people, and enable them to achieve transformational change, through contract growth in our existing service areas and markets (as described above) across England and Wales. Our current contract income position, showing relative contribution from different service areas, and our

prospects for growth (from moderate to high) is summarised below. Whether we can fulfil this potential will depend on a number of factors, some of which will be beyond our control. We will review our market opportunities and growth potential on an annual basis.

### Forward business growth potential (2024-27)



## 2. Philanthropic support

Contractual income always comes with tight restrictions on the types of services we can provide, and is rarely sufficient to meet all identified need, widen our impact through innovation or deliver against our mission. We therefore continue to work on a wide programme of fundraising from philanthropic sources – through charitable foundations, individuals and events. Through investment in diversifying our charitable income sources, we aim to maintain Forward's founding philanthropic principles and extend our giving communities to realise around 5% of total income.

Fundraising currently supports, to varying degrees, the following:

- Activities crucial to our mission, but not funded through contracts – e.g. Recovery Support, Forward Connect, Enterprise Support.
- Added value or supplementary income to support services partly covered by commercial or contract income – e.g. residential rehabilitation.
- Programme development, delivery and training – e.g. Change Up, our programme for young people affected by substances.

Our fundraising strategy will operate to deliver stability and incremental growth. It will do this by working to diversify our income, expanding supporters, and increasing our unrestricted income. It will also focus on long-term relationships and partnerships, connecting the development of our campaigns to attract wider support from corporates, individuals and communities, providing a clear platform between giving and the impact it can have. Giving supporters and donors the opportunity to engage directly with our work, creating a platform to share experiences through events, engagement, services (such as will writing) and compelling communication content.

Our philanthropic supporter base has the benefit of committed, pioneering charitable Trust support. This support is the bedrock of Forward fundraising and will never be taken for granted. Trusts supporting our mission will expect a high level of service, engagement and delivery from our projects. Delivering impact and working together on mutual charitable objectives to benefit wide-ranging communities and vulnerable people across a growing geography in the UK.




## Business model for 2024–27

### 3. Stability, sustainability & strategic investment

Forward, as an organisation that receives taxpayer and charitable funds, has a duty to find the right balance between spending our available resources on delivering our mission, and maintaining a level of reserves to protect our operations from cash flow fluctuations and unforeseen costs.

Covering cash flow fluctuations is particularly important. As most of our income comes from public sector contracts, and payment under these contracts is typically one or two months in arrears, we need to retain a level of cash reserves that is sufficient to cover our expenditure requirements. For that purpose, we will aim to maintain cash reserves at a level equivalent to 15% of our annual gross salary bill.

Where possible we will look to invest any surplus we generate, over and above these requirements, into strategic initiatives that expand or improve our services – for example investing in technology to improve digital service options, or ‘bursary schemes’ to facilitate fast track service access.



“ I can honestly say for the first time in my life that I am actually happy. I have hope for my future. I am so grateful for being alive, the joy it brings me. ”

Forward Service User

# Operational objectives

Our 3-year organisational strategy is underpinned by a common set of operational objectives, which will unify and focus effort and activity across each of our service delivery areas. With support from our central corporate teams, every service will be measured by their performance in being:



## People-powered

- Retaining staff through competitive salaries and benefits, including self-care, wellbeing and personal development packages.
- Recruiting people from different backgrounds, developing knowledge and skills for those new to our sectors through workforce development programmes.
- Maximising employment opportunities for people with lived experience as volunteers and staff members.



## Efficient

- Organising caseloads and work processes to deliver the right level of support to the right people at the right time.
- Making the best use of digital technologies to improve business processes and to enhance service delivery.
- Minimising bureaucracy through simplification.
- Managing budgets robustly to ensure financial stability.
- Minimising resource consumption and waste.



## Equal, diverse & inclusive

- Reaching currently under-represented groups in both staff recruitment and service user outreach.
- Delivering equitable outcomes for diverse and under-represented groups.
- Involving and empowering service users and people with lived experience at every opportunity in the design and delivery of our services.



## Impactful

- Always measuring our performance in terms of the progress we have helped clients achieve.
- Demonstrating step-by-step progress for service users through a defined set of 'intermediate outcomes'.
- Capturing and celebrating case studies and success stories of individuals, families and communities.
- Investing in longer-term outcome impact research.



## Sustainable & responsible

- Implementing and measuring activities to reach net carbon zero by 2030.
- Generating Social Value through employment, training and wellbeing activities, and through supporting local charities and businesses.

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