

BLESMA – THE LIMBLESS VETERANS

STRATEGIC PLAN 2024-2029

INTRODUCTION

The First World War led to the birth of nearly 18,000 charities, of which around 10 exist today. Blesma is one.

Blesma - The Limbless Veterans, as it is normally known as, is a National Charity for those who lose limbs or the use of limbs or one or both eyes in service or as a result of service in His Majesty's Forces and for Ex-Service personnel who lose limbs, hearing, sight or speech, or lose the use of a limb through a traumatic incident after service. While the majority of its Members are Ex-Service personnel, there are a number who are still serving. The Association also provides support to the dependants of its Members and in particular their Widow(er)s. The Association is governed by its Articles of Association and Rules adopted on 25 June 2023.

PURPOSE

This is a five year, rolling plan, owned by the Board of Trustees. It is reviewed annually in step with the Board's annual cycle of governance so that Blesma, with all its Members, is confident that it is doing all it should, resourced accordingly. The current horizon extends to a position in 2029 but this will be a milestone as the Plan's horizon moves forward year by year. The purpose of the plan is to:

- Align internal development and improvement agendas with external influences and be better able to anticipate an ever-changing environment.
- Synchronise policy, resources, programmes and projects.
- Bring coherence to external and internal communications.
- Enable agility, manage risk for greater impact, and reduce vulnerability to turbulence and scrutiny in the charity sector.

Board Governance Standing Instructions address responsibilities and duties of the Board and will not be repeated but referred to. Review and renewal of the Board is a continual task.

The Articles of Association and Rules were revised in 2023. The Objects of the Charity were unchanged. It is not envisaged that decisive points within the Plan will result in options being placed before the Board that require another revise of the Articles in the near future.

THE BLESMA MISSION

Blesma is here to assist its Members lead independent and fulfilling lives.

THE STRATEGIC INTENT¹

The Board resolves to have Blesma continue to be the principal Association for the Service disabled of limb². Its defining purpose is to assist its Members live independent and fulfilling lives. Blesma will be distinguished by a fellowship of shared experience. It will exploit knowledge of the experience. It will inspire. It will be about the celebration and realisation of potential. At the same time it will bring comfort. Blesma will be there for life.

In fulfilling this strategic intent it is essential the Association concurrently protects and exploits its unique core strength. This strength is the Membership of shared experience, continuing with the values of Service³.

OPERATING CONTEXT

In the recent past the cost-of-living crisis coupled with signs of economic recession created an extremely difficult fundraising environment for charities as donors faced rising bills and falling real incomes, which constrained their ability to give at prior levels. Corporate donors and partners also tightened their budgets in response to inflation and weak growth forecasts. Fast forward to today and looking ahead, donor engagement has become a real problem for a lot of charities with so many worthy causes competing for limited funds. Charities must work harder to retain existing donors while attracting new supporters, which requires nurturing strong connections and trust. ⁴

INFLUENCING FACTORS

The charity environment has undergone significant changes in recent years, influenced by various social, economic, and technological factors, including:

The state of the economy impacts on fundraising and operating costs.

Enhanced regulatory frameworks require charities to adhere to stricter reporting and governance standards, particularly upon fundraising and safeguarding. Poor behaviours within the sector can impact on the reputation of other charities.

An expectation of needs being met, but advantageous benefits beyond need are to be guarded against.

Increasing use of digital platforms for fundraising, including social media, for raising awareness, engaging supporters, and driving campaigns. Influencers and celebrities often play a significant role in amplifying charitable causes.

¹ On 20 April 2023 the Board undertook a strategic review of Blesma in order to position the Association for the future

² Membership is defined in the Articles of the Association and Rules

³ Selfless commitment, courage, discipline, integrity, loyalty, respect for others

⁴ <https://www.charitytoday.co.uk/the-biggest-challenges-facing-uk-charities-right-now>

Businesses increasingly integrate social responsibility into their core operations, leading to more partnerships with charities, promoting social causes, enhancing brand image and contributing to societal good. This predominantly benefits the larger charities.

Change in Government determines may change the level of commitment and funding to the provision of statutory services.

Change in the Service Charity Sector:

The withdrawal from major ground operations in Afghanistan in 2012 has reduced visibility of the Armed Forces amongst the British public and extremely strong altruistic support from the public of the recent past has waned. It is now more difficult to demonstrate relevancy to the wider public, which contributes to an increasingly difficult fundraising environment.

There are 1733 Armed Forces charities, of which 514 are solely focused on welfare⁵. This creates a congested and contested fundraising environment.

Increased collaboration among Service charities, government agencies, and private sector partners to pool resources and expertise, enhancing the effectiveness of services. Through Cobseo, there is a drive for greater co-operation, collaboration and consolidation.

Active engagement in advocacy efforts to influence policies that affect veterans' benefits, healthcare, and employment rights. Raising awareness about the unique challenges faced by veterans and military.

The Armed Forces Covenant has raised the profile of veterans, which has in turn, raised the expectations of veterans.

A growing emphasis on mental health support and increasing provision of holistic programs that address physical, emotional, and social well-being, such as recreational activities, peer support groups, and wellness workshops.

Expanding services to support military and veterans' families, plus recognising the vital role of carers. Programs offering respite care and peer support for those caring for injured or ill veterans are increasing.

These changes reflect a more dynamic, responsive, and interconnected charity environment, aiming to leverage technology, foster transparency, and drive greater social impact through innovative and collaborative approaches.

⁵ Directory of Social Change Sector Insights 2024

Change in Membership:

Blesma has been operating at a deficit since 2020.

There are (as at 01 June 2024) 2,663 Members⁶. Since 2020 Blesma membership has decreased from approximately 3000. Blesma needs to review this annually and adjust the level of support to the number of Members within resources.

Ordinary Membership will decrease and Associate membership increase with demographic change and longer life expectancy. There is also an increased level of complexity of injuries in the younger demographic group from more recent conflicts.

Blesma needs to be relevant to all its Members noting that the expectations of the younger Members have been raised significantly, and that strains upon the Local Authority and National Health Services provision will cause increasing distress.

A survey of Members in 2022⁷ identified that over the next 10 years Members believe they will predominantly need support for their mobility and physical well-being, followed by opportunities for socialising, activities, hobbies and sports. The survey identified four distinct demographic groups within Blesma: Members aged under 50, Members between 50-69, Members over 70, and Widow(er) beneficiaries. All groups have differing needs at different stages of their lives and support will be tailored according to their needs based on priorities.

OPERATING PRINCIPLES

Blesma will be:

- **A connected Association** - through effective communications Blesma will connect Association to Member, Member to Member and Member to any relevant other(s). It will take advantage of technology to link Members regardless of geography. It will promote inclusivity, and a better understanding of individual and Association issues using its knowledge, expertise and connections to act. Blesma is a family and a democracy; a charity of Association for its Members and its future relevance, structure and modus operandi will eventually have to be decided by its Members.
- **Member supporting Member** – the method of choice in execution, whenever possible, is for Members to advise, support and assist each other. This is the Association's strength, promoting the Intent directly, reinforcing the connected Association principle.

⁶ Includes Widow(er) beneficiaries

⁷ Nfp Membership Research Survey findings December 2022

- **Cooperative and collaborative** - understanding we do not have the resources to do it all, nor do we have all the expertise. Therefore, we must work collaboratively with service providers, authorities and other charities. The Association seeks to stay in lane in its specialist field of loss of limb and loss of use of limb, reaching out to other specialist agencies when different support is needed.
- **Understanding** - through its personal contact with Members, as well as its actions and research Blesma will continue to retain its deep knowledge of Service related and other injury in order to deliver best possible support to its Members, both individually and collectively.
- **Balanced and sustainable** - Blesma will run on a business model that is sustainable in the longer term. It will also be able to adjust to a changing environment and have contingencies in place to act quickly in unforeseen circumstances, such as another conflict.
- **Compliant** – Blesma will adhere to all statutory and regulatory rules and all professional best practice, accepted and emerging.
- **Based on need** – Blesma supports its Members on the basis of need. It does not distinguish according to the cause of injury or illness, the type of membership or branch or duration of service.
- **Support to widow(er)s** – Blesma will continue to support widow(er)s as beneficiaries following the death of their partner, through the national and outreach activity programme to promote social integration and ensure they remain connected with the Blesma family. Also supporting with advocacy by connecting with other statutory organisations and charities as required and to providing support to those in need.
- **Supportive of families** – Blesma recognises the vital role families play in rehabilitation, as well as the impact of injury and illness on family members as principal carers. It will advise, assist and support family members as beneficiaries.

OPERATING CONCEPT

Blesma will focus on meeting the needs of its Members. It will do this by developing its role as the specialist Services Charity dedicated to those serving or ex-Service personnel who have lost limbs or the use of limbs. It will know all its Members individually and will strive to understand and meet their needs to live independent and fulfilling lives. It will be recognised as the authoritative voice in its specialist field.

LINES OF OPERATION

Blesma will run four lines of operation:

- **Wellbeing** – for our Members this means managing disability, health, where they live, looking after themselves, finance, how they feel, dignity and knowing Blesma is able to be their advocate. Wellbeing includes knowledge and research as this is critical in providing up to date specialist care and support.
- **Activity** – For our Members this includes individual and collective programmes and events that provide meaningful activity, a social life, the sharing of experience, promoting confidence and self-belief, opening new horizons and exploring potential. This promotes identity and a feeling of worth. The link between Wellbeing and Activity is strong.
- **Connectivity** – this is all internal community communications and external outreach communications, including marketing and technology. Open dialogue within the Association, Member helping Member, and then reaching out to all those agencies, authorities and communities that can help deliver wellbeing, activities and resources is critical to fulfilling the strategic Intent. Being connected is the foundation of the Association’s proposition to its Members; it is why Blesma exists.
- **Resourcing** – this includes fundraising, people, finance, training and support services. The people are contributing Members, beneficiaries, volunteers, supporters and staff.

DELIVERING THE PRIORITIES

Blesma will need to deliver against a clear set of priorities based on need to address the significant impact of poor economic growth and difficult fundraising environment. It must hold a level of reserves that not only covers short term operating costs to ensure business continuity, but also allows for increased costs of comprehensive and complex support to Members, increased costs for supporting the most infirm later in life, and instant access to funds for the support of casualties in a future conflict. Blesma needs to be in a financial position that guarantees support to Members for life.

In five years’, Blesma should be in the following position:

- No longer operating at a deficit.
- The Board is confident that Blesma, with all its Members, is doing all it should and is resourced accordingly.
- The Board has the resources (finance, time and expertise) to be able to consider a number of options for the future direction of Blesma.
- The Board is assured that strategic and operational risks are managed appropriately.

Priority of Members Needs over next 10 years from Members' Survey⁸

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| 1. Mobility (getting around home or outside) |
| 2. Poor physical health |
| 3. Prosthetics |
| 4. Living at home |
| 5. Opportunities for Social life, socialising, activities |
| 6. Finances |
| 7. Mental Health |

Priority of Members Needs by demographic groups from Members' Survey⁹

| Under 50 | 50 - 69 | 70+ | Widow(er)s |
|---------------------------------|--|--|---------------------------------------|
| 1. Mobility and physical health | 1. Mobility, physical health and prosthetics | 1. Mobility, physical health and prosthetics | 1. Living at home and physical health |
| 2. Social life, activities | 2. Social life, activities | 2. Social life, activities | 2. Social life, activities |
| 3. Challenging events | 3. Finances | | |
| 4. Mental health | | | |
| 5. Finances | | | |

Priorities by Line of Operation

| Line of Operation | Priority | Delivering to the Member |
|-------------------|--|--|
| Wellbeing | Confirm the full extent of Members' needs ¹⁰ ; refresh regularly, ensuring relevance, determining partnerships with other charities to meet need in full. | Timely individual access to a support officer. Easy access to Head Office staff by phone/email, and a follow-up visit if necessary. |
| | Prioritise the vulnerable and provide appropriate safeguarding support. | Support to the most vulnerable with due regard to safeguarding. |
| | Understand all Government and administrations' position and | In person support on limb loss and loss of use treatment, |

⁸ Nfp Membership Research Survey Findings December 2022

⁹ Nfp Membership Research Findings and Considerations April 2023

¹⁰ Blesma Contact with Members – Service Delivery Standards December 2023

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| | <p>provision for limb loss, and loss of use, and be geared to act on judged gaps.</p> <p>Deliver holistic health and wellbeing support to Members.</p> <p>Grow a volunteer support network, at the hub of communities, and reaching out, including best use of members' and others skills and commitment, especially reinforcing the impact of the Activity programmes.</p> <p>Support appropriate research projects relevant to limb loss and loss of use of limb, and where appropriate influence government policy.</p> | <p>compensation and social care provision to ensure prescribed standards are met fully, consistently and fairly.</p> <p>Needs driven support for the appropriate provision of care and social support, with particular focus on later life care.</p> <p>Blesma support individually and collectively to correct anomalies and deficiencies in statutory services.</p> <p>Grant (financial) assistance (health and wellbeing, disability, independence at home).</p> <p>Personal introduction to partner charities for support upon:</p> <ul style="list-style-type: none"> • Mental health. • Housing. • Employment. • Mobility. <p>Provision of volunteer support to for wellbeing and activity programme.</p> <p>Opportunity to volunteer support to fellow Members.</p> <p>Support that is informed by the latest research and best practice.</p> |
| <p>Activity</p> | <p>Bring Members' together through Outreach Activity programmes.</p> <p>Encourage and support Members to engage with the community in which they live.</p> <p>Extend the programmes to meet the widest possible range of individual Member and whole Association needs, for example the</p> | <p>An inclusive and connected Outreach Activity programme.</p> <p>Opportunity to lead and support activities.</p> <p>Engagement in broader social inclusion.</p> <p>Access to physical, mental and social engagement focused activities, to unfold new horizons, potential, confidence</p> |

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| | <p>Storytelling and Wellbeing programme¹¹.</p> <p>Provide a programme of national and international events to challenge Members and promote confidence and self-belief. This is particularly important for new Members adapting to loss or loss of use of limb.</p> <p>Support to hobbies, sports and challenging endeavours.</p> | <p>and self-respect.</p> <p>Opportunity to partake, support and lead in activities of interest.</p> <p>Communication of participation to inspire and motivate fellow Members.</p> <p>Provision of some support towards participating in sports, hobbies, competitions and challenging pursuits.</p> |
| Connectivity | <p>Build an inclusive, positive and responsive communications network, exploiting the latest communication technology but not to the exclusion of those unfamiliar with the digital age.</p> <p>Develop a marketing and media plans that connects external audiences with Blesma who provide support services and fundraising opportunities. Build on brand awareness and representation.</p> <p>Up to date technology, including relevant productivity tools, AI and CRM.</p> <p>Remain GDPR compliant.</p> | <p>Regular Magazine, Website and Social Media news.</p> <p>Introduction to fellow Members and other user groups.</p> <p>Being part of a well-respected and recognised Association.</p> <p>Technology that supports and enhances case management for Members' needs.</p> <p>Secure and appropriate use of Members, beneficiaries, staff, volunteers and supporters' information.</p> |
| Resourcing | <p>Construct a solid, efficient, bespoke fundraising plan that is aligned with the Association's need, character and values, and takes Blesma out of deficit.</p> <p>Provide a safe, efficient and welcoming Blesma environment.</p> <p>Provide training to enable staff and volunteers to deliver their outputs in a proficient, compliant, safe and effective manner.</p> | <p>Clear rationale for fundraising and the distribution of funds to meet need.</p> <p>Safe, respectful, rewarding conditions for Members, beneficiaries, staff, volunteers and supporters.</p> <p>Trained and experienced staff and volunteers able to support and assist with Members needs.</p> |

¹¹ The Storytelling Wellbeing programme provides workshops for Members to enable them to support social connection, build confidence and promote good mental health

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| | Support Services. | Provision of appropriate Support Services to enable Head Office and Regional staff to conduct their role in provision of support to Members. |
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HOW WE DELIVER

Finance

- The budget should be sustainable. Blesma should always have the 'space' (time and finance) to pursue a range of options for the future of the Association, at any point in time. Free reserves are to be maintained at a level that permits this position, thus resourcing the ability to pursue a change of strategic direction in a deliberate, constructive fashion, and be ready for quick action if a future conflict arose and membership increases again.
- The Association takes a long-term view. It is committed to being there for Members for life, and this means being able to assist for decades to come. Reserves are apportioned so that the most severely injured veterans should always be safeguarded.
- Specifically, income sources will be diversified so there is balance in dependence. Mindful of projected membership profiles, the financial plan is modelled on assisting those injured who will have to manage their condition for decades to come. The five-year horizon is continuously rolled forward in financial projection.
- The investment policy for the Association's funds contains the objective to have an optimum level of income commensurate with operational requirements to meet the needs of Members, whilst maintaining the real value of the investments over the longer term.

Governance and Control

The Governance cycle for the Board of Trustees is Fiduciary and Strategy (April), Performance and Risk (June), Strategy Review and Programme Proposal (September), Programme Approval (November). Essentially this translates as a progression of clearing the end of previous year accounts, confirming strategy and the five-year stance, reviewing mid year performance and risks, reviewing strategy and directing the next year's budget, and then confirming the next year's intentions and budget.

Performance measurement of this plan will be focused upon outcomes, outputs and inputs. Outcomes are demonstrated using quantitative and qualitative data to produce metrics annually. Output performance is depicted in a 'traffic light' presentation of the priorities noted within each line of operation. The 'lights' are dictated by defined indicators. This presentation is produced for each Board meeting. Input performance is judged by adherence to the directed budget and forward projection. The Finance and Investments Sub-Committee plays a key role here as per Governance Standing Instruction

Number Nine. Outcomes, outputs and inputs are linked to each other in the annual metrics.

The Executive will implement the Board's direction. Governance Standing Instruction Nine sets out financial powers of delegation to the Chief Executive and other Standing Instructions provide guidance on the conduct of responsibilities. The Chief Executive will report to the Board on progress and supervise Head Office staff, making recommendations for structural changes. The Chief Executive is supported by three Directors. Feedback on performance is to be sought from the Membership on specific services and events routinely. However, the Annual General Meeting and the Members' Weekend are essential components in Members' influence on the Association, individually and collectively.

Compliance and Recognition

In accordance with operating principles Blesma will be forward leaning on emerging charity sector legislation and regulation, remaining compliant and keeping with good governance and transparency, especially toward Members.

Recognition of best and novel practice brings much benefit to a charity, to the beneficiaries and to public perceptions, and the Chief Executive is to regularly review opportunities to achieve recognised standards and awards, bearing in mind best use of limited resource.

Endorsed by the Board of Trustees

29th June 2024