



# **BUSINESS PLAN**

2017 - 2022

**Read in order to live**

Gustav Flaubert

Revised November 2018

# **Building a Reading Revolution 2017 -2022**

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# 1. Introduction and Key Terms

## 1.1 What is The Reader?

The Reader is a national charity bringing about a reading revolution so that everyone can experience and enjoy great literature, which we believe is a tool for helping humans survive and live well.

Through a growing movement of 1,000 volunteers and our many partnerships, we currently bring more than 2,500 people together every month to enjoy and experience literature's life-supporting benefits, through weekly reading aloud and group discussion.

We call this Shared Reading.

Our work with people in local libraries and care homes, looked-after-children, schools, and families, people living with physical and mental-health conditions, recovering from addiction and those in the criminal justice system, helps to improve wellbeing, reduce isolation and build stronger communities.

**Our Vision** is of a world in which everyone has 'something real to carry home when day is done'.

**Our Mission** is to bring about a reading revolution so that everyone can experience and enjoy great literature, which we believe is a tool for helping humans survive and live well. Everything we do – from our Shared Reading groups to our social enterprises, from our publications to The Reader Storybarn – creates lively, connected, warm communities by bringing people together and books to life.

## 1.2 Why a Revised Plan

This revised plan brings together and updates The Reader's plans for Shared Reading and Calderstones.

At The Reader we strive to be a learning organisation in everything we do. The last two years have brought many exciting changes and developments, shifting how we see our future growth, along with the underpinning strategy required to bring about a reading revolution. This updated plan reflects the most important things we have learned over this period.

Thanks to feedback from our group members, volunteers and staff, and through supportive, challenging conversations with funders such as NESTA, we now understand more about the building blocks needed to scale high-quality, volunteer-led projects across the UK.

During the next three years, we will achieve scale through a mixed model of community-led and community-delivered Shared Reading projects. Community-led growth will be slower than we originally anticipated –we must invest in volunteers to ensure they develop the skills, expertise and confidence required to grow and support Shared Reading communities. We also need better systems, processes and tools to support their efforts.

Meanwhile, our work on the refurbishment of Calderstones Mansion House has progressed significantly since the first draft of this plan. We've used this revision process as an opportunity to bring our two big tasks – the national growth of Shared Reading and the successful development of The Reader community at Calderstones – together into one body of thought.

This integration, and our continued thinking about the realities of our plan to build a movement of many thousands of volunteer Reader Leaders, necessitated a return to our vision and values.

We wish to thank the many group members, volunteers, colleagues, trustees, supporters and funders who have contributed to this effort.

### 1.3 Key Reader Terms

<b>Group Member/Reader</b>	A beneficiary who attends a Shared Reading group.
<b>Reader Leader</b>	A volunteer who leads a Shared Reading group. We have Reader Leaders from within local communities, as well as staff members of partner organisations who lead Shared Reading groups within their organisation or their locality.
<b>Shared Reading Organiser</b>	A volunteer who supports other Reader Leaders and is working with The Reader to grow Shared Reading activities.
<b>Shared Reading Advocate</b>	A volunteer who helps promote Shared Reading groups to potential group members, through word of mouth, events or signposting through local referral pathways.
<b>Calderstones Visitor</b>	Anybody who takes part in our programme, visits one of our social enterprises or uses the facilities at our home in Calderstones Park.
<b>Geographical Region</b>	A regional Shared Reading project where we have a critical mass of Shared Reading groups and beneficiaries.
<b>Local Hub</b>	A local Shared Reading community, potentially one of several within a Regional Hub, which supports multiple Shared Reading groups and volunteers. Local Hubs provide a place or places for volunteers to get resources, training and support, as well as regular social activities for the whole Shared Reading community.
<b>Reader-led</b>	Shared Reading projects where: <ul style="list-style-type: none"> <li>• groups are led by paid Reader staff and</li> <li>• managed by Reader staff</li> </ul> <p>Reader-led projects tend to operate within closed communities, such as prisons, acute mental-health services or schools.</p>
<b>Community-delivered</b>	Shared Reading projects where: <ul style="list-style-type: none"> <li>• groups are led by Reader Leader volunteers and</li> <li>• Reader Leaders are supported by Reader staff</li> </ul>
<b>Community-led</b>	Shared Reading projects where: <ul style="list-style-type: none"> <li>• groups are led by Reader Leader volunteers and</li> <li>• Reader Leaders are supported by volunteer Shared Reading Organisers</li> </ul>

## 1.4 What Does The Reader Do?

### 1.4.1 Diversity and Great Literature

We believe literature is a tool for helping humans survive and live well. We want everyone to benefit from its power to help us recognise and understand our inner lives, make meaning, connect with others, and spark change. We work to make literature part of the fabric of life, because great novels, poems and plays offer us a powerful language that can spark personal and social connection, and change.

By 'part of the fabric of life' we mean that great literature will be like tea and biscuits, the internet, or doors... found in every care home, in every library, in every hospital, in every mental health service, in every school, in every workplace and in every community centre. It will be normal to experience great literature in such places. Wherever you find yourself living, there will be a Shared Reading group nearby. Calderstones will be a working model of such a world.

Great literature is by its nature diverse. It travels across time and space, and speaks across cultural divides to the inner experience of individual humans. We define 'great' as literature that has the power to touch diverse people and illuminate what connects us; literature that is able to offer truthful accounts of what is private and unvoiced; lived, personal experience.

This is literature that makes readers say: 'I never knew anyone but me felt that!'. Great starts with fellow feeling. Thus a great book might be:

*Anna Karenina*  
*I Know Why The Caged Bird Sings*  
*Not Now Bernard*  
*Jane Eyre, Millions*  
*Roots*  
*Hamlet*  
*Oh, Pioneers!*  
*Fahrenheit 451*  
*The Collected Poems of Derek Walcott or Emily Dickinson*

It's not about a canon, but about the reader's recognition that a text speaks to them in the heart's deep core.

Below the surface-stream, shallow and light,  
Of what we say we feel--below the stream,  
As light, of what we think we feel--there flows  
With noiseless current strong, obscure and deep,  
The central stream of what we feel indeed.

Matthew Arnold, From *The Buried Life*

### 1.4.2 Shared Reading

The Reader is the original developer of the Shared Reading model and the founder of the global Shared Reading movement.

Shared Reading brings literature to life. A group of two or more people, one of them a trained Reader Leader, meet, usually weekly, and read books, stories, poetry, drama or other literary

matter, aloud. It's not a course and it's not a book club. Reading aloud, sharing the literature in real time, means that everyone is involved in a live experience. Group members are encouraged by the Reader Leader to respond personally, sharing the feelings, thoughts and memories provoked by the reading. While each individual experiences the text in their own way, the literature provides a shared language that can help open deep conversation and connection. Outcomes include improved wellbeing, social connectedness and increased sense of meaning in life.

No other organisation makes use of literature in this way – to understand our individual, and, collective inner and outer lives, and to share those meanings with others engaged in the same task.

### **1.4.3. The Reader at Calderstones**

For many years, The Reader was an outreach organisation, going to where people were to develop Shared Reading groups. Over time, it became apparent that group members in some of the most challenging situations – looked-after-children, adults in recovery, people with chronic physical and mental health conditions, and those without work – needed more than The Reader could offer in a weekly session. Yet, people loved Shared Reading and said: 'there's nothing like it out there'. Many people were attending two, three, four, five groups a week; in some cases, we had to restrict attendance.

In 2011, in response to a growing sense of need for something 'more', we took a decision to acquire the lease on Calderstones Mansion House, in Calderstones Park, Liverpool. We knew that in order to welcome people who struggle to find a way to join in with the wider world, this 'place for more' would need to feel very much like a Shared Reading group. It would need to have the same welcoming ethos and supportive fellow feeling, offer all-day accessibility and a diverse range of activities – even The Reader understands that not everyone wants Shared Reading 10 hours a day.

#### **Terry from Tuebrook**

This part of our ambition is summed up in the story of Terry, a man enjoying the weekly collective work of a Shared Reading group. Terry was about to leave a residential, addiction-rehabilitation programme, returning to life in a flat where he would live alone, with no job and nothing to do. His old mates were still involved in drugs. 'For two hours a week I have meaning in my life,' Terry said. 'More please!'

The Reader at Calderstones is partly for Terry – a place where he can spend as much of his time as he wants and get involved in all sorts of things; more reading, yes, but perhaps also physical activity in the park, an archaeological project or chatting to an older person with mobility problems. For Terry, the opportunities available at Calderstones may make it possible for him to find a place in the world, through a sense of community.

That's why we want to recruit volunteers from across our City Region network of Shared Reading groups and bring them to Calderstones to help us build a working model of a community based on Shared Reading.

### **A Mixed Economic and Social Model**

The Reader lives by its creativity and enterprise. We are using these powers to build a sustainable financial model for the reading revolution. We take risks, we try new things, we learn from mistakes and we are always looking for opportunities to earn income to support our mission.

At Calderstones, we want to demonstrate our ability to support our work through a mixed funding model of earned, state-supported and philanthropic funds. That's why much of the Calderstones financial plan centres on developing our enterprises: the Café, Ice Cream Parlour, Tenancies and Events. But these enterprises offer more than income –they also provide volunteering, work experience, apprenticeship and skills-development opportunities for community members such as Terry. Similarly, the Café and Ice Cream Parlour offer an easy route towards further engagement with many visitors. For an isolated older person, it's a positive first step to come for a coffee in our café. We work hard to ensure our social enterprises are powered by Reader values and that customers experience a warm, kind welcome. We will need to learn to spark and capture interest among our customers and provide ways for them to get more involved.

Calderstones is a relatively wealthy and healthy part of the City Region and this means there are a number of challenges that we must tackle in order to create a sense of ownership for those people for whom this is not a known environment; hand-held routes to the site are key. We are also aware that human struggle is not dictated by your postcode and remain committed to making life better for people who live locally.

Calderstones brings many opportunities for financial sustainability but we must work hard to ensure that we are truly open to all. The local area provides a market for our commercial products, as shown by our already successful Café and Ice Cream Parlour, but we must always have free water and cheap tea for those who cannot afford to buy a cappuccino.

The Storybarn offers a service for local families who can afford to pay, but we also offer a subsidised programme for schools and a pre-funded outreach programme for families in need. We believe the same model will work as we reopen the refurbished Mansion House and expand the site. Some activities will be paid for by those who can afford it and will be free or subsidised for those who cannot. Some activities, Shared Reading groups, for example, will always be free to all. Some will be specially developed to welcome people who wouldn't otherwise come, such as the 'Big Days Out' programme, while others, including the Heritage Centre, will be open for anyone to wander into. The toilets and Café will remain the easiest point of contact for members of the public and we must take special care to make these welcoming.

### **When Terry met June**

What we hadn't anticipated at the Calderstones site is the enormous asset that is the human and social capital of the local area. Since we've been at Calderstones, we've realised that people in the immediate locality in South Liverpool can help us with our City Region outreach. Whether volunteering to transport free books to book-swap shelves as part of our City of Readers project, volunteering as one-to-one readers with looked-after-children, or simply buying our coffee, local people are willing and able to support us and participate.

When Terry offered to be the refreshments volunteer for his Calderstones Shared Reading group (making and tea and coffee, cleaning up the cups) he met June, a local woman in her late seventies, a retired GP, who volunteers as a Reader Leader. Like Terry, June lives alone. They work together to make the group a lovely, welcoming place. They have become 'work mates' in a supportive friendship benefiting them both. When June was in hospital for a hip replacement, it was Terry who looked after her cat.

## **Heritage, Arts and Wellbeing at Calderstones**

The Reader at Calderstones will function as an experience, a shop window and a teaching centre. Our main activity will always be reading and reader development, but we've also identified heritage, non-literary arts and wellbeing as key activities<sup>1</sup>. We will have a diverse programme of both free and paid activity knitted together with a golden thread of literature. Whether a Gardening Club, A Day Reading Maya Angelou, a Graphic Novel Shared Reading group, a Park and Poetry Headphone tour or Knit and Natter, the programme will offer 'ways in', opening literature to new audiences, and offering many opportunities to engage in meaningful activity.

The programme, alongside our commercial activities, will bring an estimated 44,000 people to the site in year one. These visitors will be our social enterprise customers (36,000), park visitors using our toilets (2,000) and individuals participating in the programme (6,000). We don't yet fully understand how these visitors will engage with us and have made these estimates based on assumptions – how many times people will visit, how many different activities they may engage with – so we expect these to change as our understanding develops.

At the same time, we are training many more people in Shared Reading practice each year, and hosting events for visitors from across the UK, and around the world, who want to join our movement. We currently have relationships with organisations developing our model across 11 countries. As part of our contribution to the Liverpool City Region's status as a tourist destination, we will be encouraging all our international friends and trainees to visit Calderstones.

Calderstones contributes to The Reader's vision by serving as a model of a better, healthier and more socially integrated world, in which shared meaning-making and great literature are part of the collective fabric of our lives.

## **The Reader's Brand at Calderstones**

For the purpose of this document, *The Reader at Calderstones* is the entire area covered by our lease, including the Mansion House, Courtyard, Storybarn, Ice Cream Parlour, the yet-to-be developed Coach House and the rest of the site's outbuildings. This name also covers all the activities that will take place across the site. There are also sub-brands, such as The Reader Ice Cream Parlour and The Reader Storybarn.

## **The Build and the Future**

The current £5million Mansion House capital project includes a major renovation of the 200-year-old house, and the re-siting of the Neolithic Calder Stones that give the park and local area its name. The stones are covered in markings that indicate that what we now call Calderstones Park was a place of meaning-making more than 5,000 years ago.

The ground floor of the building will house public rooms, including the Café, Garden Theatre, Reading Rooms, Heritage Centre, Exhibition Space, Teaching Rooms, Events Space and Shop. The basement will house catering kitchens, stores and public toilets. The first floor will house commercial tenants and The Reader offices.

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<sup>1</sup> Heritage because of our specific location, the history of the Mansion House, Park and Calder Stones; Arts because in our early years of occupancy local people demonstrated their desire to visit the Gallery (a display space is part of our lease agreement), and to enjoy classes and workshops, theatre and more; wellbeing because the park naturally lends itself to the promotion of wellbeing, as does Shared Reading.

The build is only the beginning of what may be a century-long project. The Reader is fundamentally repositioning the place and value of literature in the world. We want to ensure that everyone has 'something real to take home when day is done' and that is why we are building The Reader at Calderstones; a diverse community where literature is woven into the fabric of a meaningful life.

## 2. The Why and What of The Reader

### 2.1 Why is The Reader Needed?

Life in the developed world is fast-paced and complex. Most of us are living longer, have more 'stuff' than we need, and exercise greater choice over how we live than any generation before us. Yet, in spite of this, many people report low levels of wellbeing and connection to others. Until 100 years ago, strong social bonds through extended family, workmates and parish communities, along with the seasons and their rituals, provided us with a structure for understanding our thoughts and feelings, and a sense of belonging. These connections and patterns are no longer strong, and we need new ones.

For thousands of years, literature has helped humans to find meaning and connection by providing a powerful language to explore our inner thoughts and feelings. Ensuring that everyone can enjoy and experience literature as part of daily life has the potential to rebuild some of the social bonds that have been lost, and create a stronger, healthier and more connected society.

By bringing people together and books to life, we are connecting people to themselves and to others, developing a shared language for our inner lives, and sparking the personal and social change that is needed.

**“A tough life needs a tough language,  
and that’s what literature offers. . .”**

Jeanette Winterson

### 2.2 What Distinguishes The Reader?

The Reader is distinguished among literacy, reader promotion and other literature organisations by five things:

- Our emphasis on the reading of 'great literature'
- Our Shared Reading model and the diverse communities grown from it. Our desire to open the world of great books to children, for no reason other than creative pleasure, through reading, play and imagination
- Our determination to demonstrate the difference literature can make to life by building a community based on Shared Reading at Calderstones
- Our desire to power the reading revolution through social enterprise, using our entrepreneurial business skills for social good

### 3. Our Values

The Readers beliefs and values reflect and shape our behavior, which in turn creates our culture. Our values sum up what we stand for and how we do things. This is a list, but what we actually do, and the way we do it, is the best way to see our values. We agree to practice what doesn't come naturally.

#### **We read to lead**

- Great literature is a key element of our DNA –we use it to develop imagination, deepen understanding and expand experience.
- Reading is also about the kind of attention and understanding we give to our actions, other people and the wider world.
- We use both kinds of reading and reflection to help us understand ourselves, the world and how we can best act in it.

It suggests to Connell that the same imagination he uses as a reader is necessary to understand real people also, and to be intimate with them.

Sally Rooney, *Normal People*

#### **We are kind but bold**

- By being kind but bold we inspire ourselves, and others, to do more than we might have thought possible.
- Kindness helps us care about how we treat each other, always aiming for encouragement, openness and trust.
- We are bold in saying what we mean as clearly as we can, to the person we need to say it to, ensuring they can hear.

Speak what we feel, not what we ought to say

William Shakespeare, *King Lear Act 5*

#### **We make our own pattern in the world**

- We don't simply do as others do, we try to work out what is good, and right, and do that – we don't want to end up with 'patterns that other people have made'.
- We aim to make our own patterns, and value innovation, foresight and bold ideas in every part of the organisation.

- We want to understand each other's thoughts and feelings, checking that we are on the right track – we don't want to follow 'the wrong god home'.

If you don't know the kind of person I am  
and I don't know the kind of person you are  
a pattern that others made may prevail in the world  
and following the wrong god home

William E. Stafford, *A Ritual to Read to Each Other*

**We are open to new experiences and we learn from our mistakes**

- We believe that life is about learning from experience, and we see mistakes as learning opportunities – though they hurt, we're not afraid of owning them.
- We try to be creative in difficult situations – lively-minded and willing to learn.
- We receive and offer feedback freely, and trustingly, because it helps us learn.

Ever tried, ever failed. Try again. Fail again. Fail better.

Samuel Beckett, *Worstward Ho*

**We love The Reader and take responsibility for it**

- If love seems a funny word in this context, we take responsibility will do instead.
- The Reader is its people – group members, volunteers and staff – everyone at The Reader is The Reader.
- We each take responsibility for making The Reader as good as it can be – we pick up the rubbish, speak up when we've made a mistake, notice and try to fix the glitches.

What we have loved, others will love,  
and we will teach them how.

William Wordsworth, *The Prelude*

## 4. Governance and Organisational Structure

### 4.1 Governance

The Reader is a registered charity and a company limited by guarantee. It is governed by its Memorandum and Articles of Association, updated and adopted on the 13 November 2017. The charity is governed by a Board of Trustees that meets four times a year.

A Committee structure is in place to support the Trustees in ensuring good governance. There are currently three Committees: (i) the Audit Committee, which oversees governance and risk; (ii) the Capital Committee, which oversees the refurbishment of the Mansion House; (iii) the Nominations Committee, which oversees Trustee appointments.

The Calderstones Mansion House Community Interest Company (CIC) is a fully owned subsidiary of The Reader that oversees the operation of any non-primary purpose activity, currently The Reader Café and Ice Cream Parlour businesses. All of the profits are invested into The Reader to support the charitable aims of the organisation. The CIC has its own Board of Directors that meets four times a year.

The Audit Committee is a Group Committee that oversees the work of the CIC as well as The Reader. Please see Appendix B for details of current Trustees to The Reader Board and Directors to the CIC Board.

### 4.2 Structure and Leadership

The Reader is led by its Founder Director and a group of senior leaders each leading a Directorate. Two Associate Directors provide additional senior leadership, largely though not exclusively for Calderstones. The senior team, called the Directors' Group, is supported by an Executive Assistant.

<b>Founder Director</b>			
<b>Chief Operating Officer &amp; Director of Finance</b>	<b>Director of Programmes &amp; People</b>	<b>Director of Communities &amp; Communications</b>	<b>Director of Development &amp; Partnerships</b>
<b>Associate Director Social Enterprise</b>	<b>Executive Assistant</b>		<b>Associate Director Calderstones Development</b>

For further detail and biographies, please see the detailed organisational chart in Appendix F.

## 5. The World Around Us

### 5.1 Mental Health and Social Isolation

The demand for mental-health support is rising at a time when primary-care services continue to be stretched – the need and potential for our work has never been greater. A survey of more than 1,000 GPs conducted by mental health charity Mind revealed 40% of GP appointments now involve mental health and 66% of GPs say the proportion of patients needing help with their mental health has increased in the last 12 months. Three quarters of GPs surveyed said they are seeing between one and five people a day suffering with loneliness, which is linked to a range of damaging health impacts, such as heart disease, strokes and Alzheimer’s disease. Around 200,000 older people have not had a conversation with a friend or relative in more than a month.

In 2018, the Government launched its first **strategy on loneliness**. This was followed by the launch of the **NHS Long Term Plan** in January 2019, which highlighted a growing interest in **social prescribing**, with new investment announced for ‘link workers’. There is a growing movement to recognise the potential for arts interventions and libraries to deliver health outcomes, yet there are still challenges at local and national level to consistent adoption and funding at scale. Effective social prescribing would enable us to build better referral pathways with primary and secondary care services. We know that continued work on our evidence, profile and partnerships is key.

Like any charity or social enterprise, The Reader faces challenges as well as opportunities – competition for voluntary and statutory funds is fierce, and the systems in which we work, such as local authorities, prisons and the NHS, are disconnected, pressured and in flux. Over the coming years, we will do more to share the evidence of our impact with policymakers, to strengthen our position as a quality, trusted provider for social prescribing. At a local level, we will continue to seek meaningful connection with the relevant networks and partners who can ensure our activities are included in pathways where social prescribing is already working.

### 5.2 Health and Wellbeing in the Liverpool City Region

At Calderstones, we will be challenged to reach new audiences in new ways, in order to work with those in the Liverpool City Region who need support the most. According to the Index of Multiple Deprivation 2015, Liverpool was the fourth most deprived local authority and 45% of Liverpool’s population live in the top 10% most deprived areas in England. The severity and extent of deprivation has significant implications for the health and wellbeing of local people, and is strongly associated with poor health outcomes from childhood through to old age (Liverpool Compendium of Health Statistics 2017). Over 38,000 people in Liverpool are now on a GP register for depression, which is one in 11 people in our city. It has been estimated that as many as 86,000 residents have a common mental-health disorder, such as depression or anxiety (Public Health Annual Report 16-17); 37.5% of people in Liverpool over the age of 65 live alone, significantly higher than the England average of 31.2% (Compendium of Health Statistics 2017).

### **5.3 Reading and Young People**

Academic research shows that reading for pleasure is more important for children's cognitive development than their parents' level of education and is a more powerful factor in life achievement than socioeconomic background. The Organisation for Economic Co-operation and Development says: "Reading for pleasure is the single most important thing that will make a child successful in life". Yet, most children in England do not read on a daily basis. In 2011, 37% of 10-year-olds surveyed reported reading for pleasure every day. There is clear need for The Reader to further explore how projects for young people can build positive, lifelong relationships with books and reading.

The Storybarn provides a unique family and education offer. In its first two years, it has drawn customers from across Merseyside and the wider North West region. Otterspool Adventure Centre is our main competitor as a local family destination, along with local family friendly cafés and soft-play areas in South Liverpool. A focus on the benefits of reading for pleasure in a stunningly imaginative environment is key for schools, where we are competing with other 'days out' that provide learning opportunities, such as Croxteth Farm. Our schools market will be strengthened as our heritage offer comes to life.

### **5.4 Reader Development**

A number of key players work alongside us in the field of reader development, including The Reading Agency, Booktrust, Beanstalk and the National Literacy Trust. We are keen to work more closely with organisations in this field, as well as Libraries Connected and the Publishers Association, in order to acknowledge where we overlap and where there may be opportunities for partnership. Section 2.2 outlines how we differentiate ourselves from the organisations listed above. Within the schools market, we are not alone in our emphasis on reading for pleasure, but we differentiate ourselves by our total concentration on pleasure and personal response.<sup>2</sup>

We see ourselves as market developers, as well as promoters and distributors of great literature, so we also have a competitor-supporter in those who teach literature within education. Partnerships with university English departments would be a great asset to us, but our non-academic, 'make literature useful' stance does not fit easily with current academic modes of thought.

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<sup>2</sup> A well-meaning educationalist, watching a Storybarn session said, "Your reader staff could really have built on that by getting the children to identify all the nouns..." but our key concern is to get each child to love reading. We are not here to teach literacy but to love books. We believe the literacy will follow the love.

## **5.5 Delivery Organisations in-Criminal Justice, Arts and Health**

The Reader shares delivery space with a range of voluntary sector organisations, as well as public services. Although there are a number of organisations working in the fields of personal development, social connection and wellbeing, we believe our offer is unique because of the 'added value' brought by the literature itself<sup>3</sup>. We work with a range of partners at a local level, who provide huge value to our Shared Reading provision. We will be working to map and enhance our partnership journey over the period of this plan, to building our partnerships with national organisations, as well as securing effective referral partnerships with statutory services.

As part of our Criminal Justice programme of work, we are open to opportunities for partnership working. As we build our programme at Calderstones, we are keen to learn from and forge links with other organisations that run mixed-use centres, with whom we can share learning. We are grateful to our strategic funders, who are helping us to make new connections, including the Arts Council England National Portfolio network and the People's Postcode Lottery family of charities.

## **5.6 Volunteers and Donors**

We are aware that we are one of many other charities who rely on the generosity of volunteers and donors. We continue to work hard on refining our offer for volunteers, to differentiate us and drive recruitment. Competitor analysis is a key part of our ongoing work to assess potential for individual giving at local, regional and national levels. The 'dual benefits' Shared Reading volunteers report with regards to improvements in their own wellbeing and social connection is a real strength, and we must continue to reflect this advantage when promoting volunteering opportunities at The Reader.

## **5.7 SWOT**

Our senior team and our Board of Trustees have refreshed the organisation's SWOT analysis this year. Please see Appendix C.

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<sup>3</sup> As dance offers physical exercise as well as company and like-minded companions, so the Shared Reading literature offers mental or emotional exercise, challenge or wisdom, as well as the more obvious social benefits.

## 6. The Reader's Ambition, Goals, Objectives

By 2022, we will see success in the following areas:

### **The successful establishment of Calderstones and its businesses**

By 'successfully established', we mean Calderstones will be a lively and well-used centre, which is financially stable, providing a Shared Reading hub for the Liverpool City Region and the wider North West, and a lodestar for the UK and wider world. A successful Calderstones site will have a well-used programme of Shared Reading, heritage, culture and wellbeing activity, and will be generating income from social-enterprise activities that are in tune with our core purpose. Success will mean 44,000 annual visitors by 2022, including 10% from economically deprived areas of Liverpool, with opportunities for people to make connections, feel good, volunteer, learn, develop new skills and gain employment.

### **An effective support structure in place for a growing Shared Reading movement**

By 'effective support structure', we mean the necessary infrastructure, such as digital, communications, training, support quality control, monitoring and evaluation for the Shared Reading movement, and a sound financial structure that is enabling high-impact Shared Reading to scale the UK. This means 1,500 Shared Reading groups and one-to-one Shared Reading opportunities will be supported by this structure by 2022. The detail around the people and places these groups will reach, and how we will get there, is outlined in the objectives and goals below.

### **The Reader will be a strong, learning organisation**

By 'strong, learning organisation', we mean exceptional personal and organisational development, guided by our values, will make The Reader a flexible, curious, determined and brave organisation, and a pioneering place to work, volunteer or participate.

Ah, but a man's reach should exceed his grasp,  
Or what's a heaven for?

Robert Browning, From *Andrea del Sarto*

## VALUES

Everything starts from here

***"derived from people but also from radiance, heights"***

- We read to lead
- We are kind but bold
- We make our own pattern in the world
- We learn from experience and our mistakes
- We love The Reader and take responsibility for it

## PILLARS

Everything rests on these

Good  
People

Great  
Literature

## VISION

The world we want to create

A world in which everyone has  
*"something real to carry home when day is done."*

## MISSION

What we need to do to bring our vision about

Our mission is to bring about a reading revolution so that everyone can experience and enjoy great literature, which we believe is a tool for helping humans survive and live well.

Everything we do – from our Shared Reading groups to our social enterprises, from our publications to The Reader Storybarn – creates lively, connected, warm communities, by bringing people together and books to life.

## WHAT WE MAKE HAPPEN

The changes we make happen in people's lives through the things we do

People feel more connected to other people

People experience improved well-being

People have a greater sense of purpose

People have a better relationship with literature

## OBJECTIVES

The things we do in the world to achieve our mission

1500 Shared Reading groups and reading pairs

Successfully establish Calderstones and its businesses

Be a strong, learning organisation

## WHAT?

Things we need to put in place to support our mission

Improve Digital

Scale Quality

Develop Evidence Base

Raise Awareness

Expand Partnerships

Sustainable Income Model

## 6.1 Our Objectives

### Objective 1: Grow Shared Reading



## Objective 2: Successfully Establish Calderstones



### Objective 3: Be a Strong, Learning Organisation



## 6.2 Key Metrics Year-by-Year

<b>People we will connect with</b>	<b>19/20</b>	<b>20/21</b>	<b>21/22</b>
Calderstones visitors	44,000	44,000*	44,000*
UK Shared Reading Groups and one-to-one Shared Reading opportunities	780	1,000	1,500
UK Shared Reading group members engaged	14,000	19,000	29,000
UK volunteers supporting Shared Reading	1,200	1,500	2,000

\*Growth in Calderstones visitor numbers will be reviewed following our first year of activity at the new site.

## 7. Our Shared Reading Growth Strategy

### 7.1 Three-year Targets

- Grow our UK-wide Shared Reading provision by 122%.
- Focus on scaling up our beneficiary numbers, not just our number of groups, aiming to increase our average group size from six to eight by the end of 2021/22.
- Develop pathways and partnerships including social prescribing models that offer a smooth transition for people, ensuring people can easily access groups at different points throughout the course of life.
- Sustain the quality of existing and new Shared Reading provision, to ensure impact.
- Develop mechanisms to collect data and assure quality at scale.
- Establish a Hub Structure that will allow us to focus growth where we have a critical mass of local activity.
- Maintain a focus on people who are experiencing loneliness or are at risk of being lonely, those in social isolation, have low mood, are living with or are at risk of developing physical or mental-health problems.
- Engage three new partners who have national scale to embed Shared Reading in their services.

We will be measuring the following outcomes:

- 70% of participants experience improved wellbeing
- 70% participants feel less socially isolated

### 7.2 Key Considerations for Growth

In order to increase our community-led provision, we will work with new and existing Shared Reading Organisers to understand how we can give local projects more autonomy, while ensuring we are meeting The Reader's strategic priorities in terms of beneficiaries and places reached. This will include exploring:

- Community fundraising models.
- Controls and restrictions on how local projects develop.
- Establishing levels of association or affiliation with The Reader, along with tools and checks to maintain impact.
- Other ways to assure quality at scale.

Until these areas of work are complete, we are prioritising the growth of community-led Shared Reading in two ways:

- Supporting our existing Shared Reading Organiser network to further develop their communities through a Training and Support Programme (see section 12.2).
- Cultivating new Shared Reading Organisations in our hub areas outlined below.

A 120% growth in Shared Reading activity is an ambitious, exciting prospect for our organisation. While lower than our projection in the first draft of this plan, this target ensures we can build learning from the previous two years into the growth strategy, the highlights of which include:

**TIME MATTERS:** our plans need to allow enough time to find the right partners and volunteers essential for Shared Reading to flourish. Time is even more important when creating demand in newer areas – it can take six months for activity to start. Shared Reading Organisers need time to develop skills, expertise and confidence, and Reader staff must fill the gap during this period, either on the ground, or remotely.

**THE PERSONAL IS CRUCIAL:** volunteers want regular, meaningful connection to The Reader – its staff and other volunteers. Personal relationships are also an integral part of successful partnership working, at a local, regional and national level, so needs more head office input than first anticipated. Volunteers also want a local, physical space in which they can connect, share resources and support each other.

**REFINING OUTCOMES:** Mass data analysis shows that our impact is strongest in relation to psychological wellbeing and social connection – this insight is key to informing who we engage with and why.

**QUALITY = IMPACT:** The impact of Shared Reading diminishes if we do not provide volunteers with easy access to high-quality training, support and materials. This means developing a system for getting physical copies of reading material to volunteers, as well as making them available online. We need to create more materials for volunteers who struggle to find the time to discover high-quality reading materials, week in, week out.

These insights collectively led to the decision to pilot a Hub-based model of Shared Reading delivery in 2018. It showed good results, is being rolled out nationally in April 2019. The next section outlines Hub Structures in more detail.

### **7.3 Developing a Hub Structure**

We will establish local hubs within larger geographical regions, in order to:

- Create the conditions that will allow group members to move into volunteering more effectively, where people develop from a group member to a Reader Leader and from a Reader Leader to a Shared Reading Organiser, where appropriate.
- Understand and respond to specific local needs, ensuring we reach those who need it most.
- Build and maintain local partnerships and referral pathways to help ensure our groups are reaching the people who can benefit most.
- Develop relationships and showcase impact with commissioners and funders in that region, who will get to understand the value of Shared Reading and potentially support the ongoing cost of sustaining projects.
- Create and support peer-to-peer connections, and richer relationships between volunteers and group members, through the provision of socials and regional events.
- Simultaneously support community-led and community-delivered models of Shared Reading, allowing for better collaboration and more efficient working.
- Resource Shared Reading through a place-based approach and avoid siloed, contract-based ways of working.

To support this Hub Structure, we have reorganised the core, centralised services that staff and volunteers working in Hubs draw on. The 'ARTSS' team allows staff to work in a collaborative way and encourages cross departmental learning, while ensuring a consistent volunteer journey. This team will collaborate to ensure consistency within the end-to-end volunteer experience nationally, focusing on key stages in the volunteer journey:

**Attract** – To attract new volunteers and partners.

**Recruit** – To deliver a recruitment process for new volunteers that is robust, fair and follows standardised systems and procedures.

**Train** – To train volunteers to deliver high-quality Shared Reading groups and the various activities needed within Shared Reading projects.

**Support** – To share and refine the tools volunteers need to nurture local Shared Reading groups and communities, including attracting new group members effectively, and ensuring the quality of the experience at scale.

**Sustain** – To sustain Shared Reading communities with limited intervention, keeping groups and group member numbers high, partners onboard, and replenishing volunteers when required.

#### **7.4 What is in a Hub?**

Each Geographical Region will contain a number of Local Hubs. The ingredients of a Local Hub are:

- **Adequate financial investment** to fund Shared Reading groups, training and events.
- **A good spread** of volunteers across all roles, including Advocates to shout about Shared Reading, Reader Leaders to lead Shared Reading groups and Organisers to grow Shared Reading communities.
- **A critical mass** of Shared Reading groups to offer a vibrant peer-to-peer experience.
- **A systematic supply of group members** including ‘walk ups’ and those referred by local services.
- **A network of partners** who can offer funding, a venue, staff to train or a group member referral opportunity.
- **A Hub Leader** who as a member of Reader staff is charged with looking after partners, volunteers and group members in their local area.
- **A Shared Reading Space** is a physical place where reading and promotional materials can be stored, where volunteers can meet, training can take place and other events can be held.

We are committed to making sure that our Shared Reading Communities understand they are part of The Reader and have regular opportunities to connect in a meaningful way. The Reader will work collaboratively with Local Hubs to ensure:

- We have an effective process through which group members ‘sign up’.
- We have a high-quality Shared Reading Community area as part of The Reader website that allows people from across the country to connect and share experiences, access great literature and additional training, and learn about the organisation’s wider work.
- We run annual, regional events that give local groups the opportunity to connect with others outside of their Hub and feel part of something bigger than their own group or community.
- We continue to capture feedback and impact from our communities in a consistent and meaningful way.

## 7.5 Where Are These Hubs?

Taking into consideration the key ingredients for a hub identified above, our immediate priority regions and the local hubs within them, are detailed below. Each hub will contain a combination of community-led and delivered Shared Reading.

<b>Region</b>	<b>Local Hubs</b>	<b>Projected growth over duration of plan</b>
North West	Calderstones, Knowsley, Liverpool, Manchester, Sefton, Wigan, Wirral	165%
South West	Bristol, Somerset	70%
London	North, South, West	145%

We have also identified several 'emerging Regions', areas where Shared Reading activity is beginning to grow, good relationships are being built, and sustainable funding opportunities are available. We will monitor emerging Hubs closely, looking for development opportunities and supporting the projects with Reader staff activity on the ground. Grant funding is normally the catalyst for these projects. At present the emerging hubs are as follows:

<b>Region</b>	<b>Local Hubs</b>
Yorkshire	Doncaster, Rotherham, Sheffield
North Wales	Anglesey, Conway, Gwynnedd
Northern Ireland	Belfast

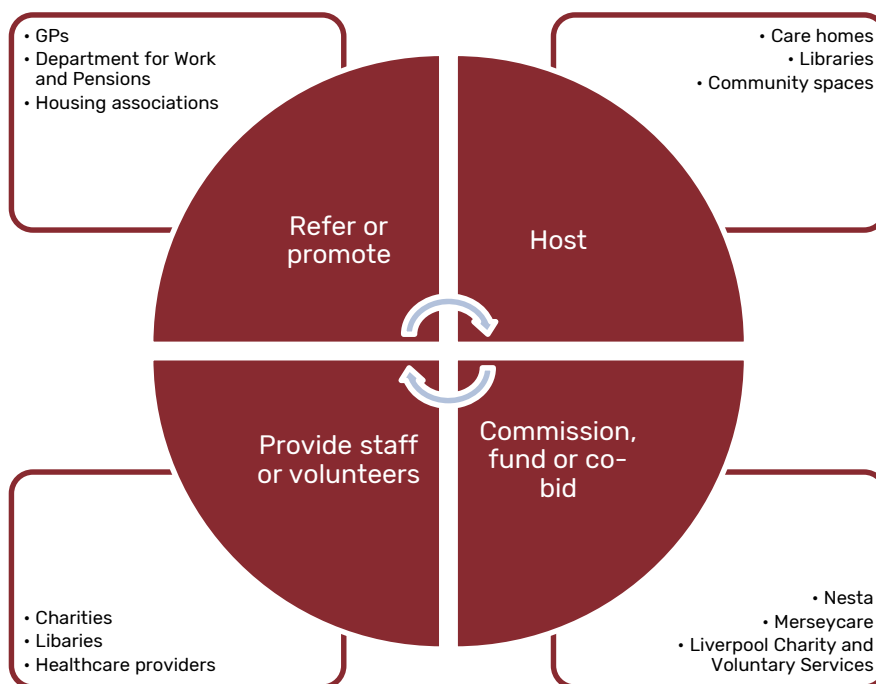
Finally, we are using Big Lottery funding to pump-prime several community-led projects in various locations across the UK; we hope that these projects will become emerging Hubs over a two-to-three-year period. Geographies include Shropshire, Lincolnshire, Leicestershire and Monmouthshire.

We plan to grow the provision in our emerging Regions and Hubs by 100% during the course of the plan. These areas will be under continual review.

## 7.6 Partnerships

As we expand our Shared Reading Community, and establish the programme at Calderstones, partnership development will become even more important. We have a very diverse network of partner organisations. They vary in size, come from a variety of sectors and interact with The Reader in a range of ways, from light-touch collaboration to established, long-term partnerships. We have learned that it can take time to establish shared values, aims and workable partnerships.

Below are examples of who and how we work.



We are grateful to the large number of partners already contributing significantly to the Shared Reading Community; giving time, venues, advocacy and promotional support. They include hospitals, libraries, housing associations, community centres, charities and high-street shops. These partnerships are often managed at a local level. Many partners cross-cut categories, for example, partners hosting and promoting activities that are also run by their own staff or volunteers.

In our Liverpool Hub, it will be vital for us to build and strengthen partnerships to ensure Calderstones is an effective, well-used community asset, and that we reach new audiences. We are working collaboratively from the start, through co-creation work that helps us develop partnerships around programming, marketing and outreach, in order to tackle barriers to access and participation.

### 7.7 Partnership objectives:

While partnership working is devolved across the organisation, the Directorate of Development and Partnerships will have a central coordination and support role, with the following objectives:

- Develop partnerships in the Liverpool City Region in order to widen access and deepen participation in our programme at Calderstones.
- Develop partnerships with at least three national partners in order to embed Shared Reading in their provision.
- Develop local and regional partnerships in our Hub areas that can help deliver programme objectives, and strengthen the case for funding.
- Develop stronger relationships with public sector commissioners, so Shared Reading is more effectively embedded into pathways inside and outside of statutory services, reaching people who need it most.
- Refine and implement a smoother partner journey, ensuring staff have the materials and support they need to effectively build and nurture relationships.

- Assess potential partners against the criteria and ingredients we know need to be in place to ensure a successful Shared Reading partnership, embedding ongoing cross-organisational learning.
- Implement a more effective relationship-management system to track and monitor partnerships, and wider stakeholders, in line with the Digital Transformation programme.

## 8. Shared Reading and Criminal Justice

Our long-term goal is for Shared Reading to be recognised and commissioned as a key piece of the rehabilitative culture of Criminal Justice, so that Shared Reading becomes part of the fabric of life for people in prison. In the short-term, commissioning within the sector is difficult and the operational delivery is challenging. Despite being in more than 30 individual settings, we have made little progress in growing this work significantly over the last 24 months.

### 8.1 Deliver Great Work and be Positioned for Change

Criminal justice is a sector undergoing significant change in two specific areas to which Shared Reading can align.

In offender health, The Ministry of Justice (MOJ), the Department of Health and Social Care (DHSC), HM Prison and Probation Services (HMPPS), NHS England and Public Health England have developed a National Partnership Agreement, with a key priority to improve mental health and wellbeing.

Meanwhile, the new Prison Education Framework includes wellbeing as a key element. The Reader, like other arts organisations, is cautious about short-term growth in this market while the policy and commissioning frameworks are still undergoing so much change.

Our priorities will be to work on our:

- **Programmes** - Ensure excellent delivery within our commissioned work, including our national contract to work in Psychologically Informed Planned Environments (PIPEs), co-funded by NHS England and Ministry of Justice, hitting Key Performance Indicators (KPIs) and outcomes, and ensuring continued learning and evaluation.
- **Evidence** - Completion and publication of external research, in partnership with the Institute of Criminology at the University of Cambridge, into the contribution of Shared Reading to the 'enabling environment' of the PIPEs
- **Product** - Assess the optimum delivery model in prisons, taking into account the operational and budgetary constraints we have encountered. We are monitoring our current delivery costs closely to ensure that any product evolution and expansion in the future is sustainable.
- **Profile and relationships** - Targeted networking and communications activity to maintain strong relationships with key audiences, including existing commissioners, potential third-sector partners in the arts and criminal justice and healthcare, prison governors, relevant influencers at a local, regional and national level, and professional networks such as Clinks.

We will be measuring the following two key outcomes of our Shared Reading work in prisons:

- 70% of participants will develop increased self-awareness
- 70% of participants will develop increased self-expression

## 9. The Growth Strategy for Calderstones

The Reader at Calderstones is a key part of The Reader's vision, helping us achieve our mission by becoming a living model, demonstrating a world in which everyone has 'something real to carry home when day is done'. This next section outlines the key activities that will be delivered to successfully launch Calderstones over the coming three years.

### 9.1. Redevelopment Phases

We are delivering a phased capital redevelopment:

- **Phase 1 – Courtyard** – In 2015, The Reader completed its first capital project with the refurbishment of an old barn and stable block at Calderstones (£0.5million). Two new enterprises launched to occupy these spaces – The Reader Storybarn and Ice Cream Parlour.
- **Phase 2 – Mansion House** – In 2018, builders started on-site to undertake the £5million refurbishment of the Mansion House, including relocation and rehousing of the Calder Stones. We will open our International Centre for Shared Reading in late Summer 2019, which will include a shop, event space, café, reading rooms, heritage exhibition and commercial offices for hire.
- **Phase 3 – Coach House and Outbuildings** – In 2019, we will start the planning and feasibility work on a business plan for the Coach House, including a capital refurbishment project estimated at around £1million.

### 9.2 Opening and Beyond...

Following the completion of the refurbishment in Summer 2019, the doors at Calderstones Mansion will open to bring together a vibrant community programme and expanded commercial activities operated by Calderstones Mansion CIC (see CIC business plan in Appendix H).

The Director, working closely with the Head of Programmes, will lead programme content. The programme has been co-developed by group members, volunteers, staff, café regulars, and the wider community, and will include the establishment of 30 weekly Shared Reading groups, a Festival of Shared Reading, weekly wellbeing groups, arts groups, theatre performances, heritage experiences, and 'Reader Days' where people explore a theme or area of literature.

Working with community partners, we will bring people we've engaged during outreach work to Calderstones for Big Days Out, filled with reading, exploration of the park, history and heritage, lunch and community activities. We plan to build emotional connections by having a lovely time.

### 9.3 Our National and International Visitors

Calderstones Mansion House will play host to much of The Reader's training programme, and we plan a range of training courses, reading retreats and away days for some of the thousands of people we have trained over the past ten years. We want to try to weave the 'international' element of The Reader movement into the Mansion House, from pictures of Hans Christian Anderson and Derek Walcott, through to items on the Café menu. This is fantastic opportunity for us to show literature's diversity, on the walls in quotations and pictures.

#### **9.4 Key Learnings for Calderstones**

- Making Terry from Tuebrook truly welcome is mission critical. Calderstones has a natural local audience, but we will have to work hard to bring large numbers of people who could benefit from it from other parts of the City Region.
- Partnerships, co-creation with communities and collaborative working will be crucial to this. The kind, real connections made in Shared Reading will be vital in persuading Terry to 'give it a go'.
- The 'golden thread of literature' must run through everything.
- We have a solid local market for commercial services at Calderstones, which must be further developed.

## 10. Our work with Children and Young People

### 10.1 Working Close to Home, with Children in Most Need

We have a strong record of reading with children, and plan to build on three key strands of work in the North West to interlace Shared Reading and Calderstones:

- **The Storybarn** – An imaginative play space dedicated to sharing the delights of reading with young children and their families, The Storybarn exists to spark a life-long love of books and reading, and an unending curiosity to explore the astonishing worlds of our imaginations. When the Mansion House opens, our Storybarn offer will be enhanced with a new heritage element, where children and families can experience the stories belonging to the Mansion House and the Park itself, and visit the Calder Stones on site.
- **Volunteer-led, One-to-one Shared Reading with Looked-after-children:** Funding from Children in Need will ensure that weekly one-to-one Shared Reading sessions with children living in care across the North West support the emotional wellbeing of some of the region's most disadvantaged young people.
- **First Page:** Ongoing funding from the Steve Morgan Foundation will enable The Reader to engage children and families who are experiencing disadvantage across the UK, building their confidence in reading for pleasure, as well as training the organisations who work with them to ensure local support and future sustainability.

Over the course of this plan, we will be prioritising engaging Children and Young People in the North West, in order to:

- Give the volunteers reading with vulnerable children and their families the support they need.
- Protect our excellent outcomes through quality support and assurance activities.
- To concentrate on working with partners that will help us reach disadvantaged families, and offer those families standout experiences by bringing them to Calderstones and the Storybarn, or embed Shared Reading for children into partners' service provision.

### 10.2 Outcomes for Children and Young People

We will be measuring the following outcomes:

- 70% parents and carers engaging with our provision will report that sessions are helping their child to build a positive relationship with books and reading.
- 70% of families engaged with our provision will report improved wellbeing.
- 50% of those engaged in this work, including Storybarn, will come from areas of deprivation.

### **10.3 The Storybarn**

The Storybarn continues to grow and strengthen since it first opened in 2016. It offers a unique, engaging experience for children who attend as part of school visits, or who visit with their parents or carers.

The Storybarn offer for the duration of this plan will include:

- Programmes for schools.
- Birthday parties.
- Incy Wincy Rhymers, for pre-school children and their families.
- Storyhunters, our family offer for older children.
- Seasonal activity, such as the Christmas Grotto.
- In addition, the opening of Calderstones provides us with a unique opportunity to launch a new heritage offer, which is currently being developed.

Ensuring the quality of the Storybarn provision remains a key priority during this period. Over the last 12 months, the Storybarn delivery team have been working within a quality framework set out by our Communities Team. This programme of observation, self-reflection and skills-gap training has had a positive outcome, reducing staff turnover and increasing quality, which will help us to maintain our reputation in the market. In 2019, we will refine and embed a new evaluation framework for the Storybarn.

The Storybarn has the potential to be replicated elsewhere and we will continue to explore these opportunities during the period of this plan. Treasure Island, a Storybarn pop-up, which ran in a shop unit at Liverpool ONE from April to August 2018, attracted 7,000 visitors and raised interest from several local authorities.

## 11. International Shared Reading

The Reader has had international partners and collegial friendships since our first Read to Lead training programme in 2008. Each country has developed in a unique way and The Reader has gained enormously from seeing these different developments.

The Reader currently supports the development of a worldwide movement of Shared Reading by:

- Producing, in English, a range of internationally accessible teaching and promotional materials that spread the idea of Shared Reading, through our redeveloped website and volunteer support system, films and anthologies, and training materials.
- Attending and speaking at relevant conferences or other gatherings when the invitation includes travel expenses and a fee.
- Encouraging trainees to visit Calderstones the International Centre for Shared Reading at Calderstones for new courses, additional training or reading experiences.
- Offering a responsive range of training, Train the-Trainer, quality assurance and other support packages to individuals or groups that wish to develop a Shared Reading Community in their country.
- Featuring international Shared Reading Communities on our website and looking out for things we can learn from them.

By July 2019 we will add:

- Encouraging trainees Reader Leaders to use our 'Trained by The Reader' logo.
- Building territory-specific partnerships with individuals or groups that meet our development partnership criteria.
- Reaching out twice a year to international members with news and updates.
- Asking international trainees to share contacts details with their fellows, on order to build an international fellowship network.

We have struggled to find a unified way to shape and conduct international relationships, and to allocate the organisational capacity to proactively develop those relationships. We believe there is a nascent visit Calderstones market alongside global training and we want our international relationships continue to grow. We need to clarify and simplify the ways in which we are able to conduct them, so we are consulting with international partners on a three-level range of partnerships, which we've developed in light of the following principles:

- The Reader's priority is the UK; we don't have capacity to lead with international work, but we are happy to work with others who have the capacity to find money to involve us. As in UK-based, community-led Shared Reading, the work itself has to be embedded in local cultures or to arise out of it.
- We are the pioneers of Shared Reading but we know there is a lot for us to learn as Shared Reading comes to life in new places.
- We will continue to run an annual programme of International Read to Lead and other courses at Calderstones, in order to plant the seeds of Shared Reading around the world

## 12. Organisational Pillars Supporting Growth

### 12.1 People and Organisational Development

It is important that our high-quality workforce of staff and volunteers enjoy meaningful and challenging work, and are able to develop in an environment that values diversity and allows our unique culture to flourish.

The number of volunteers and staff needed to run our social enterprises at Calderstones will both grow during the period of this plan. At the same time, we remain committed to keeping our core team at the minimum size required for effective work: we don't want, and can't afford, to become administration heavy. This requires all existing staff to be as good as they can be; not simply role-capable, but also emotionally literate, highly responsible and good communicators. Our working processes must be as streamlined and efficient as we can make them.

We've always cared about people at The Reader. We are committed to providing our volunteers with an excellent volunteer experience. With this revision to the Business Plan we are putting group member, volunteer and staff happiness and learning into our top-level strategic aims:

- We will embed the idea and practice of continuous and conscious learning at The Reader. We are going to become a deliberately developmental organisation<sup>4</sup>. Literature and Shared Reading will be at the heart of this programme.
- We will develop a People and Organisational Development Strategy that takes a long-term view on how we want the organisation to develop, and how our culture can support that development.
- A new Leadership Development programme and other learning experiences delivered from within, and outside the organisation, will improve the skill, confidence and satisfaction of staff.
- We will work to ensure the integration of our growing and varied workforce, removing silos in thinking and processes so that there is a clear sense of personal ownership, a culture of speaking up and being listened to, and a commitment to personal learning and organisational improvement.

#### 12.1.1 Objectives

By 2022, The Reader will have:

- Developed its own leadership course
- Improved the staff development offer
- Developed an efficient role evaluation system
- Designed a way to support better pay for parenthood
- Improved recruitment and selection processes for staff and volunteers
- Obtained the Investing in Volunteers Kitemark
- Developed a diverse and inclusive community

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<sup>4</sup> See *An Everyone Culture: Becoming a Deliberately Developmental Organization* Harvard 2016 by Robert Kegan et al.

## 12.2 Diversity at The Reader

The Reader has worked for many years with extremely diverse groups of people, bringing literature alive in many places and among populations where great literature is in no way the norm – hostels, secure mental health units, probation services, addiction-recovery centres and care homes. The Reader's work is based on the belief that great literature can provide points of connection for diverse groups of people.

The Reader uses the most profound writing to uncover connections between people. Shared Reading group members from all walks of life find this moving, exhilarating and emotionally sustaining. Literature's life-saving value lies in its ability record and transfer emotional experience from one person to another. Literature exists to help us recognise and use our emotional experience. Thus, *Not Now, Bernard* would count as a work of great literature, as would *The Epic of Gilgamesh* or an Elizabeth Taylor short story, or Maya Angelou's *I Know Why The Caged Bird Sings*, or Wordsworth's *Prelude* or Derek Walcott's 'Love After Love' or A.A Milne's *The House at Pooh Corner* or Ann Bronte's *The Tenant of Wildfell Hall*.

Great literature is not a canon or a list. 'Great' will be decided by readers and will be based on readers' sense that the work addresses something in themselves, touches or expresses their own condition. As Shared Reading grows and reaches new individuals and communities, the range of literary texts will also grow to meet the understanding of diverse people with diverse experience.

Reader Leaders, choosing works of great literature for Shared Reading each week, bear a particular responsibility for choosing work that addresses emotional realities. The Reader tries to support this development through curated reading resources, training and best practice modelling.

A powerful current mode of thinking is 'identity politics' – as individuals or groups seek to recognise, promote or raise consciousness of a specific aspect of their identity – such as class, disability, gender, race, sexuality. While recognising the need to identify with experiences that reflect our own, and to find role models who are like the person wanting the role model, The Reader has always attempted to find a place beyond such identities. People in prisons are not only criminals, they are also sons and daughters, lovers, victims, parents, people who have suffered, been homeless, who have had extraordinary and terrible human experiences. Why wouldn't the works of Shakespeare, Derek Walcott, Tolstoy, Chinua Achebe, George Saunders and George Eliot speak to them, rather than simply a true-crime novel?

The argument here is about quality and complexity and about what human beings are.

At the same time, it is right that The Reader should offer as wide a selection of great writing as possible, and not simply offer what is usually recognised as 'great'. One of our newly reformulated values is 'we make our own pattern in the world' – we don't unthinkingly go along with what already exists.

### 12.2.1 Developing our Equality Action Plan

The Reader has always had diversity engrained in its mission and way of being, as well as in key policies. However, there is more we need to do. As a new Arts Council National Portfolio Organisation we take the 'Creative Case for Diversity' seriously and are using it as a prompt to make diversity a key element of our organisational thinking during the period of this plan. We need also to make explicit everything we already do that helps diversity flourish.

The first stage of our work is to draw together a working group to look at national exemplars of best practice and to conduct an audit of diversity across people, literature and programmes. We want to seek to actively understand what 'diversity' means for our work, our

reach and our curatorial activity. A more fully developed Equality Action Plan will not only inform and guide our work but make more explicit what we already do and plan to do. We will be assessing a number of areas;

### **Programming**

- How we curate diverse literature to be used in Shared Reading groups and train our volunteers to do this.
- Our publications and The Reader magazine.
- The Storybarn and associated products.
- The Calderstones programme, such as our theatre and festivals, groups.

### **Engagement and audiences**

We have a strong record of reaching diverse audiences with our work. For us, key audiences are:

- Shared Reading group members.
- Visitors and participants of Calderstones activities.
- Volunteers.

### **Board and Governance**

The Board recognises its role in delivering The Reader's Equality Action plan and will be an active stakeholder in its design, implementation and monitoring.

### **Recruitment and workforce**

We recognise that there is more we can do to increase diversity in recruitment and the Equality Action Plan will offer a series of recommended actions.

## **12.3 Keeping the Quality Up**

Throughout the period of this plan, The Reader's Learning and Quality team will continue to focus on ensuring that staff and volunteer-led Shared Reading groups are of high quality. There are two strands of work underpinning this goal: Training and Support, and Literature and Publications. The list below outlines key objectives for each work strand over the coming three years:

### **12.3.1 Training and Support Objectives**

#### **Develop and deliver Train the Trainer programmes for staff in Hubs**

As training is increasingly delivered by local Hub Leaders, it is important that volunteers engaging with our training and support programmes have a consistent experience, and that staff running them feel confident in doing so, with clarity about which aspects of Shared Reading must be 'made live'. In 2019, an amended programme for Reader Leaders and Shared Reading Organisers launch. Its delivery and impact will be monitored annually.

#### **Relaunch and deliver an effective Revolution Begins at Home programme**

A learning programme for staff, ensuring that a strong literary culture and commitment to ongoing learning develops within our Hubs. We need staff who are confident and excited about using great literature within their working lives and are empowered to develop the quality of their practice – a touring programme of half and full-day workshops will make that happen.

#### **Develop effective ways to assure quality at scale**

We have learned a lot from the Practice Mentoring programme that previously assured the quality of staff-led Shared Reading, but we know this is a difficult model to deliver at scale; it depends on one-to-one group interactions, which we've found difficult to deliver

consistently, for example, in Criminal Justice. Taking the best aspects of this work and combining it with newer ideas piloted in volunteer-led Shared Reading, the team will continue to develop effective ways to assure quality at scale, making use of improved online support, written tasks and podcasts to support the quality of activities delivered locally.

### **Deliver a range of activities at Calderstones to get people into great literature**

From Readers Days and Retreats to immersive professional development sessions for teachers, these activities will: bring new audiences in, provide additional experiences for existing visitors and raise additional income.

### **Continue to develop and deliver International Shared Reading projects**

Managing a range of international relationships, from organisational friendships to more formal partnerships. This will include ongoing legal work around agreements and course delivery and Train the Trainer work.

### **Provide central support for courses**

Managing administration, preparing course materials and managing training and support online.

### **Provide useful texts and content ideas to support the People team**

Particularly focused on ensuring great literature is built into the personal and organisational development programme.

## **12.3.2 Literature and Publications**

Over the next three years, the Learning and Quality team will deliver a Literature and Publications strategy that:

- **Gets high quality, diverse books and publications into the hands of our volunteers**, both through direct provision within Hubs, and through online inspiration and digital downloads.
- **Builds library partnerships and commercial relationships** to provide an infrastructure for getting books to people across the UK.
- **Defines the role of The Reader magazine** and outlines the plan for raising its profile to reach new audiences, and ensure its long-term sustainability.
- **Creates an additional six anthologies and publications**: three Reader-printed publications aimed at our volunteer community; three commercial propositions available to the general public that showcase our ethos alongside great literature from across the ages.

### **A Diverse Range of High-quality Texts**

The Reader brings a diverse body of great literature to life for a diverse audience. They may be dedicated literary readers or never have read a poem or novel, they may not be literate, may not have strong English proficiency, or may simply not see reading as part of their identity.

Getting reading matter to our Reader Leaders and group members is possibly the biggest operational challenge we face as we grow.

The Reader trains Reader Leader volunteers to spot what to look for in a good or great text, and over time many Reader Leaders become adept at curating their own selections of literature. They feed this back into the central literature bank through a weekly 'swaps' system, or by personal recommendations at Reader events. Other Reader Leaders may

remain unconfident or less certain for a long time, and we have a growing body of volunteers across the UK requiring high-quality physical and digital reading materials. We know that regularly introducing our Reader Leaders to great literature is one of the most immediate ways we can boost the impact of community-led Shared Reading.

## **Accessing Texts**

We use and share a vast range of texts, and offer access through both digital and print, as well as in-house and professional publications from a range of publishers.

We have a photocopying licence, which allows us to copy material, and we use and recommend a lot of material that is out of copyright. At Calderstones, we have a large library of book-sets and a resource room administered by volunteers. We also, in some areas, use library stock, but this is not as widespread as we want it to be. Our new digital infrastructure will play a vital role in building an easy-to-use, searchable online library and facilitate better ways for volunteers to share and view reading material. The creation of Shared Reading Spaces in Hubs will also ensure better sharing of resources locally.

## **Reader Publications**

We produce a range of publications to provide reading material to inspire people who we work with many of whom will be learning about great literature from a standing start. These include:

The *A Little, Aloud* series, published through Chatto & Windus, part of the Penguin Random House group, provides a source of materials for Shared Reading groups, engages the wider public with The Reader's message and methodology, and earns income. Over 43,000 copies of the three previous volumes have been sold, and new volumes are now in development.

*A Little, Aloud* is marketed by Penguin Random House, and sold through bookshops and Amazon.

The Reader has published a series of in-house anthologies, such as *Poems to Take Home*, *Minted*, *On Active Service*, *Poets Don't Lie*. We use our anthologies in groups and sell them on our website, and have more than 9,000 copies in circulation. Our Publications Strategy brings all our thinking and practice about reading matter into one place. It considers both editorial policy, diversity and dissemination.

## **The Reader Magazine**

The Magazine has been in production since 1997, reaching approximately 500 subscribers each year. Subscribers are a mix of people who have undertaken training and highly literate members of the public. The magazine has traditionally published the highest-quality new writing, essays, poetry and short stories, as well as recommendations for reading and case studies from the work of The Reader. The magazine has always invited submissions from unpublished writers, or those in early-stage careers, as well as writers of the highest professional calibre. The Reader has long been distributed by Central Books. It is sold in bookshops including Waterstones in Liverpool and through The Reader website.

In autumn 2018 the retirement of the current editorial team gave an occasion to pause publication and to rethink, asking 'is the magazine what we now need it to be, 21 years on from inception?'. A group has been drawn together from April 2019 to decide on priorities, style and content for the future. A new editor will be appointed to take on editorial and production responsibility.

To tie the development of the magazine in with the scaling of Shared Reading, we will

develop new editorial and marketing policies, drawing on the overarching Publications Strategy, with the overall aim of broadening circulation and increasing our subscriber base.

### **12.3.2 Succession planning for literary expertise**

As long-standing members of staff retire or move to new roles elsewhere, loss of literary experience is a risk to the organisation. As part of succession planning, it is vital that we continue to attract people with literary talent and wide reading experience – great readers with a deep understanding of a diverse range of texts, including texts from different times.

We need early-career staff who can bring high-quality academic learning to The Reader and develop it here. But we also need to find ways of attracting more mature and experienced literary readers into our team. Therefore, we must work to develop relationships and spot talent, seeking ways to bring such talent, whether part-time, or perhaps as volunteers, into the workforce.

## 13. Enablers at The Reader

The Reader is enabled to do its work by key tools, practices or workstreams, as follows:

### 13.1 Communications and Marketing

The Comms and Marketing team have four strategic objectives over the coming three years:

- Raise the profile of Shared Reading, Calderstones and the benefits of reading great literature across the UK and beyond, so that we attract more partners, volunteers, donors and group members.
- Showcase the impact of Shared Reading and Calderstones to potential funders, commissioners and policy makers, so that we can ensure financial sustainability.
- Market the programme and commercial opportunities at Calderstones, to ensure the project succeeds.
- Ensure that our existing Shared Reading communities are engaged and informed.

#### 13.1.2 Key Activities Include

- Organising and delivering Calderstones launch events in 2019 and events to 2022, to engage local, regional and national audiences with the innovative programme being built at Calderstones, and the various ways they can get involved.
- Improving internal communications at The Reader, to ensure we have a well-informed, engaged workforce.
- Launching, managing and refining The Reader's new website in 2019.
- Delivering a core events programme, including an annual conference and large regional events, such as the Penny Readings.

### 13.2 Digital Transformation

In 2018 to 2019, with support of the National Lottery Community Fund, The Reader commenced phase one of its digital transformation programme, drawing up a digital strategy for the organisation, and setting out a roadmap for how we can use technology to strengthen and streamline, and expand our impact. This was done by a third-party agency who delivered a research project involving staff drawn from across the organisation, as well as a small group of Shared Reading volunteers, resulting in a roadmap for a new digital development, plus recommendations for procurement and budget. It is important to note that while there are digital development projects to deliver, these will not succeed in isolation. Digital transformation will involve and affect all departments:

- With Programmes to ensure digital infrastructure reflects service design and operational strategy, and streamlines monitoring and evaluation processes.
- With People, so it's clear what training, skills and cultural changes are needed to become a more digitally enabled organisation in the longer term.
- With Development, so new digital tools enhance our brand and ability to raise money.
- With Communities, to ensure we support volunteers effectively.
- With Finance and IT to ensure systems are integrated and we have a robust, secure, efficient backbone to support our operations and staff.
- With CIC, so we promote our businesses and manage our customer relationships effectively.

The roadmap sets out three key streams of work:

### **13.2.1 Data and Infrastructure**

- Digital and non-digital solutions will increase the amount of monitoring data collected from volunteers and staff. Data reciprocity must be addressed so volunteers and staff are motivated to use systems.
- A simple back-end system, that is easier for inputting and analysing data.
- A new system for collecting data directly from beneficiaries.
- Streamlined data management systems and processes to reduce administrative burden and silo-working, including 'option appraisal' of CRM systems.
- Innovative ideas for use of hardware and software in Calderstones Park, such as an interactive map hosted on hardware in the Mansion House, virtual reality innovations, or onsite donations.

### **13.2.2 Redeveloping The Reader's Public Website**

A Minimal Viable Product will be in place for the launch of Calderstones, displaying The Reader's refreshed brand and key messaging. Key aims will be:

- Improve information architecture and ease of use.
- Ensure the site is driven by insight into user requirements and user journeys.
- Have a connected and more consistent journey between The Reader's websites and social channels.
- Improve how we illustrate our social impact.
- Ensure website is mobile optimised and accessible.
- Provide access to an interactive digital archive for Calderstones Heritage information.
- Build a robust site that can adapt to changing needs cost-effectively over time, as new features, requirements, or businesses need to come on stream, such as ecommerce, booking systems.

### **13.2.3 Co-developing Digital Volunteer Support**

We know from staff and volunteers that digital support can aid volunteer training and support, but not replace it. We know core functions that need to be improved are:

- Expenses processes.
- Reading matter.
- Training resources.
- Data input.
- Feedback.

We also wish to also explore podcasting and the role of technology in the relation to The Reader magazine.

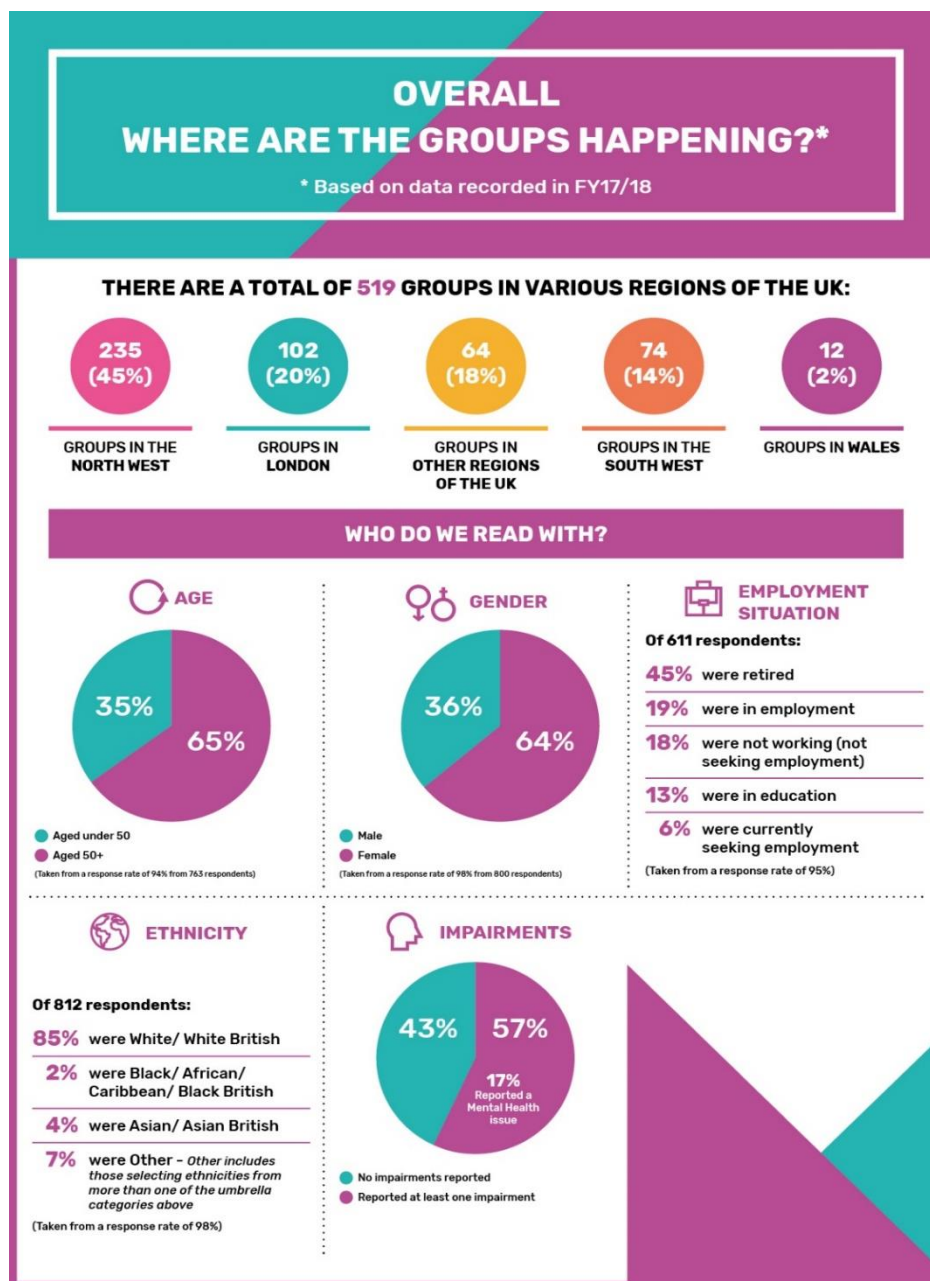
It's important that we adopt a user-led approach so we can place our community at the heart of digital development, ensure that technology enhances our model effectively and meets needs in a cost-efficient way. We will employ agile methodology and service-design principles to ensure that whatever we develop has been co-designed and tested with target users.

### 13.3 Monitoring and Evaluation

#### 13.3.1 Monitoring and Evaluating Shared Reading Activities

We currently gather both quantitative and qualitative monitoring and evaluation data annually to measure the impact of our work on both Shared Reading beneficiaries and volunteers. The current evidence demonstrates the dual benefits of our volunteer-led model.

This diagram illustrates who we are currently reaching from a Monitoring perspective:



During 2018, work with a number of partners has improved our thinking in a number of areas:

**Our work with NESTA has been important in challenging us to think hard about how we increase our dataset, focus evaluation, evidence the preventative nature of our work and establish how we will evaluate at scale**

Our funding from the National Lottery Community Fund provides the opportunity for us to undertake a further piece of evaluation work to support us in this area. This comes alongside an external process evaluation undertaken by Renaisi to understand the barriers and enablers to the sustainability of *Shared Reading*.

**Pro Bono Economics completed a piece of work for us that proposed a means of calculating the cost-effectiveness of community *Shared Reading* groups**

This data can be combined existing evidence linking reductions in loneliness to cost savings for health services, using the matrix to calculate cost-benefit across five main loneliness-impacted conditions: depression, dementia, diabetes, strokes and coronary heart disease. In addition, the report recommended that The Reader includes the De Jong Gierveld six-item loneliness scale in future evaluation.

**University of Cambridge Criminology Department undertaking an *Evaluation of the Shared Reading Model for an Imprisoned Population in the Offender Personality Disorder (ODP) Pathway, for HMPPS and NHS England***

This work will help us to evidence the impact of *Shared Reading* in the Health and Criminal Justice sectors. An ethnography-led research instrument, Measuring the Experience of Reading Groups (MERG), is being developed, which we may be able to adapt for wider use in non-Criminal Justice *Shared Reading* groups. The work is expected to be completed by July 2019.

A project being undertaken by Audience Agency will provide recommendations for how we measure *Shared Reading* not just at Calderstones, but across all *Shared Reading* delivery.

### **13.3.2 Evaluation Priorities**

In light of this learning, our key evaluation priorities for the next three years are:

- Work with an external evaluator to undertake a longitudinal evaluation research project, which will take us to Level 3 in the NESTA Standards of Evidence. We envisage this work using a control group comparison.
- Pilot longitudinal use of the De Jong Gierveld six-item Loneliness scale. We are fortunate that this measure is part of the evaluations required by projects with Bristol Ageing Better and Brightlife Cheshire, who are happy to share the results. Once a large enough data sample has been collected, we will be able to review the effectiveness of this tool and consider whether we want to incorporate it into our own measures.
- Review the outcome of the Cambridge University study, and implement a plan to use this research to help us evidence our impact in the Health and Criminal Justice sectors.
- Improve our direct communication with group members, which is more difficult in the volunteer model, to ensure we can successfully undertake longitudinal evaluation and can easily gather qualitative evaluation data.

- Develop digital infrastructure that will allow us to carry out our monitoring and evaluation activities in a more efficient and direct way, increase response rates and successfully undertake longitudinal evaluation sampling.
- Build our dataset to ensure we have statistically significant data for both volunteers and group members.

### 13.3.3 Monitoring Priorities

An urgent priority is having good information about the number of individual people that our volunteers and staff read with, where the reading takes place, what's being read and who is attending the groups.

Our move to a volunteer-led model has made this more difficult and led to us having to make assumptions based on the data we have. This means we run the risk of understating our reach. We are also less able to learn effectively about the impact and issues around community-led delivery. Over the next three years, we will have the opportunity to create new and easier ways for our volunteers and staff to submit their reading data.

Therefore our monitoring priorities for the next three years are to:

- Cleanse our existing data, some of which is currently unreliable, in order to ensure accuracy, and minimise the number of assumptions and projections
- Develop the digital infrastructure that will allow us to offer innovative, easy-to-use ways for volunteers and staff to provide monitoring information, and as a consequence increase the current data submission rate for volunteers from 45% to over 80%.
- Create incentives for submitting data, providing acknowledgement and feedback on the information submitted, and the difference it makes.
- Create a simple system for us to record basic contact information about our group members and wider reading community.
- 

### 13.3.4 Monitoring and Evaluating our Activities at Calderstones

There is much work to be done to ensure that we have a robust monitoring and evaluation framework that will allow us to understand the impact of all our activities at Calderstones, as well as understanding who we are engaging, numbers of visitors and visitor journeys.

We plan to monitor and evaluate our Calderstones activities under the broad headings of Health, Economy, Community, Learning and Heritage.

There are three key areas of work:

- **Create:** Devise an evaluation strategy that meets our needs and the needs of our partners and funders, and develop appropriate evaluation tools and data collection systems.
- **Embed:** Embed a system to regularly collect data in-house that can be used now and be repeated year-on-year in the future.
- **Invest:** Understand the future investment required, either digital or non-digital, to improve or enhance these initial systems.

Part of the project will be to conduct an immediate baseline so that we have a good starting point against which we can consistently measure future progress. This project

also provides the opportunity to streamline monitoring and evaluation of the Storybarn offer into our general operational monitoring and reporting.

## 14. Finance and Development

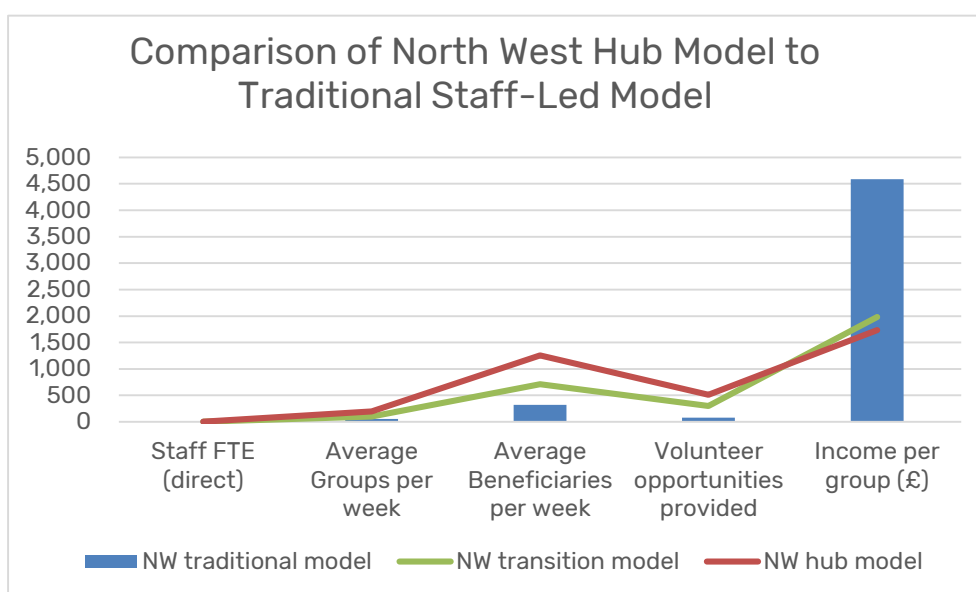
### 14.1 Introduction

The Reader began in 1997 and was subsequently incorporated in 2008, and grew continuously until 2015 to 2016. Growth began to slow in 2014 to 2015, when the public sector funding cuts finally began to affect us. By 2016 to 17, our income began to decline and this led to a major review of how to make our business sustainable. At the same time, we were giving real consideration to how Shared Reading could be scaled to reach more beneficiaries. It quickly became apparent that the traditional staff-led model, which required an average investment of £5,000 per group, would not be an affordable option for our funders as we grew.

During this period, there were a number of projects where volunteer-led delivery was being undertaken. To explore this approach as a scaling model, we undertook a 'test and learn' project with Nesta, where we pooled commissioned income and resources in the North West and moved to a volunteer-led delivery model. We have been establishing the volunteer-support systems needed to support a growing number of volunteers, while also achieving the economies of scale needed to make our groups more cost-effective and sustainable.

The income required to support a group in our more established Hubs has now reduced to £2,000 per group, and further economies of scale may be possible as we scale up and build our digital infrastructure. We've increased the number of groups available, which have engaged more beneficiaries and offered broader volunteering opportunities, as illustrated in the graph below.

The Criminal Justice sector continues to be our most challenging one, where we maintain a staff-led delivery model and the cost per group remains high. However, we have seen strong outcomes in this area with 92% stating the 'group is a place where I feel safe and welcome', and 80% saying 'hearing other people's views in the group helps me to think differently about things'. Our research into the impact of Shared Reading in PIPES<sup>5</sup> settings, along with careful and continuing assessment of this changing marketplace, will help us to decide the direction we should take.



<sup>5</sup> PIPES – Psychologically Informed Planned Environments, a radical programme (DoJ/DH) to create therapeutic communities in Criminal Justice settings. The Reader currently works in 30+ PIPES

## 14.2 Social Enterprises at Calderstones

The enterprises at Calderstones under The Reader's Community Interest Company (CIC) continue to provide the organisation with a high level of support towards our head office facilities and central staffing costs. Not only does the CIC donate all of its profits to The Reader, but it will also support 35% of the running costs for the refurbished Mansion House. For more information please refer to the CIC Business Plan.

## 14.3 Five-year Forecast

The Directors Group have set a rolling five-year forecast that shows performance for 2017 to 2018 and forecast between 2018 to 2019 and 2021 to 2022. When the original five-year forecast was set, it contained a very ambitious income target. While the target remains ambitious, we have reforecast to take into account the resources needed to sustain and fortify the new volunteer-led model, develop the Hub Structure, and look to establish and grow new sustainable income streams over the long-term.

	2017/18	2018/19	2019/20	2020/21	2021/22
	£	£	£	£	£
<b>Income</b>					
Grants*	698,169	1,032,257	1,794,338	1,297,988	1,049,477
Training & Commissions	919,504	924,121	867,411	954,152	1,144,982
Events	83,298	116,659	84,000	95,000	95,000
Publications	12,292	12,276	15,000	30,000	37,500
Donations, Corporate & Investment Income	66,072	212,795	72,000	72,000	144,000
Property Income	16,827	17,824	41,460	42,257	43,046
CIC Income	557,512	561,133	851,384	985,750	1,030,674
<b>Total Income</b>	<b>2,353,674</b>	<b>2,877,065</b>	<b>3,725,592</b>	<b>3,477,147</b>	<b>3,544,679</b>
<b>Expenditure</b>					
Salaries	1,380,112	1,645,104	1,984,692	1,771,753	1,849,486
Other staff costs	82,044	120,492	145,314	138,787	136,045
Resources	63,970	125,119	488,991	289,359	273,418
Overheads, depreciation & interest*	246,112	424,428	255,187	300,229	330,375
CIC Expenditure	543,116	555,423	851,311	976,911	955,190
<b>Total Expenditure</b>	<b>2,315,354</b>	<b>2,870,566</b>	<b>3,725,495</b>	<b>3,477,039</b>	<b>3,544,514</b>
<b>Surplus/ (Deficit)</b>	<b>38,320</b>	<b>6,499</b>	<b>97</b>	<b>107</b>	<b>165</b>

\*Excludes capital grant income, expenditure and depreciation covered by restricted fund release (i.e. deferred capital grant)

## 14.4 Development Strategy

The Development and Partnerships Department is responsible for:

- Securing the **income that** The Reader needs to sustain and grow its work.
- Developing **partnerships** with organisations who can help further our mission, and oversee and monitor partnership development across the organisation.
- Ensuring **relationships** with our key funders and other stakeholders are nurtured.
- Working with the Social Enterprise team to develop **the commercial strategy** for Calderstones.
- Exploring **new ideas** and **opportunities** for revenue generation to further our mission.
- Working with the **Communications** Team to effectively showcase the impact of our work, and raise profile with current and prospective funders, partners and influencers.

In 2017, we set out a new five-year budget and strategy to diversify The Reader's income and to develop a more sustainable model. Over the last two years, we have made strong progress and gathered key learnings, which now inform our revised strategy. Yet it is clear that there are big challenges ahead to a) develop a sustainable model for Shared Reading and b) secure the resources required to support The Reader at Calderstones and cement a sustainable mixed income model.

<b>Income Stream</b>	<b>Assumptions</b>	<b>Opportunities</b>	<b>Risks</b>
<b>Grants</b>	<p>A number of large grants are due to finish in FY 2021/22.</p> <p>Nurturing the relationships with our family of core funders is a priority – renewing their support remains key, particularly during a period when our social businesses are in their early stages and the commissioning environment is volatile.</p>	<p>Strong success rate in the past.</p> <p>The Calderstones programme gives us new opportunities to engage new funders for support with Storybarn, Heritage and the broad artistic programme. Seed funding already in place can provide match funding.</p> <p>Our fantastic family of grant funders continue to offer valuable advice, healthy challenge, profile and networks.</p> <p>Satisfactory systems in place to coordinate prospect research, pipeline management, bidding and reporting.</p>	<p>We fail to meet core funder requirements (such as reporting or media profile) which prevent them from renewing their support – this will be mitigated by strong account management, and we have now completed the first year of partnership with three new core funders satisfactorily, receiving positive feedback and gaining valuable experience.</p>
<b>Training and Commissions</b>	<p>We will focus Development resource on the Hubs as outlined in this plan to secure and sustain commissions in regions we already operate in. This will help us prioritise staff time more effectively and invest in partnership development on the ground, which strengthens bids and delivery.</p> <p>We will look for a number of ingredients when assessing new business opportunities:</p> <ul style="list-style-type: none"> <li>• Extension or growth is likely.</li> </ul>	<p>The Reader has maintained a consistent, strong recommission rate of 84% between FY 2017/18 and FY 2018/19.</p> <p>Case studies and track record of commissioning.</p> <p>Shared Reading Organisers volunteers want to grow their projects and, like Reader staff, want tools and training to be able to spot, prioritise and progress potential leads. They bring a different type of</p>	<p>Leads emerge when commissioners meet Reader staff or volunteers and experience Shared Reading or personally ‘get it’ – it’s a relationship-based business. We will include development training in staff induction, as well as a toolkit so that all staff are empowered to identify and qualify leads.</p> <p>Short-term, annual commissioning cycles can be challenging, particularly for new projects that need time to set up and demonstrate value.</p>

	<ul style="list-style-type: none"> <li>• It has a clear focus and addresses needs we have identified.</li> <li>• It is straightforward to deliver the project using existing resource.</li> <li>• Partners are identified that meet our partner criteria.</li> </ul> <p>We will not start new projects in new regions outside our Hubs in FY 2019/20. Over the course of this plan, we will only consider projects in new areas when:</p> <ul style="list-style-type: none"> <li>• There is at least £25,000 of investment to allow us to adequately resource growth.</li> <li>• Key ingredients are in place, including delivery partners signed up and indication of ongoing sustainability if funding is for one year only.</li> <li>• Outputs and project timelines reflect the time needed to cement partnerships and recruit volunteers.</li> </ul>	<p>development capacity and we need to maximise this.</p>	<p>Until we have a better digital infrastructure in place, we don't have an offer for small commissions outside our Hubs.</p> <p>Given that we are still testing the most effective way to scale community-led Shared Reading outside our Hubs, we will develop a light-touch offer for people who want to build Shared Reading projects but who fall outside of our existing regions. This might include a package of event invites, anthologies and light-touch training to start them on their Reader Journey.</p>
<b>Criminal Justice</b>	<p>Projecting to maintain income level year-on-year, based on retention of national contracts and some loss or replenishment of prison-based contracts.</p>	<ul style="list-style-type: none"> <li>• Launch of independent research will afford us PR opportunities.</li> <li>• Strong impact and track record, plus significant spread of work.</li> <li>• Grant funding secured for FY 2019/20 to support core teams to refine Criminal Justice strategy.</li> </ul>	<ul style="list-style-type: none"> <li>• New Dynamic Purchasing System introduced for Governors may require competitive tendering for contracts our size.</li> <li>• Inconsistent commissioning between NHS and prisons</li> <li>• Constrained prison budgets to support a staff-led model and operational constraints often hinder a prison-led model</li> </ul>

		<ul style="list-style-type: none"> <li>Partnership model could enable us to test volunteer-led model for future</li> </ul>	<ul style="list-style-type: none"> <li>Limited Development resource available for proactive business development</li> </ul>
<b>Health</b>	<p>Projecting growth, based on maintaining current recommission rate, replenishment and growth of new business.</p>	<p>-The NHS Long Term Plan has highlighted social prescribing and the potential for arts or social activities to support key agendas, including prevention, ageing well, dementia and mental health support. Development and Communications teams must continue to work closely together to proactively seek opportunities for profile and engagement with health market, and create more opportunities for commissioners to experience Shared Reading through events.</p> <p>We have experience working at different points of pathways of care and our community-led model provides a more affordable product.</p> <p>We have some strong and high-profile advocates and commissioners of our work.</p> <p>-Potential for a flexible Shared Reading package for Libraries sector. We have strong partnerships with libraries that are interested in refining the partnership model with us, along with emerging relationships with strategic partners in the sector. A review of</p>	<p>The Reader's key commissioning bodies, Clinical Commissioning Groups, Mental Health or NHS Foundation Trusts and local authorities through public health, are all affected by public sector austerity. The commissioning landscape feels unpredictable and varied.</p> <p>Decision-making time is lengthy.</p> <p>Business development acquisition process is time-intensive and not relative to the amount of first-year annual investment. Largely this is due to the fact that Shared Reading is not widely known or tendered for.</p> <p>New commissions we've secured over the last year have begun with a small amount of financial investment, however an investment of time from the commissioning body is leading to stronger signals of sustainability and better project delivery. This includes help with building referral pathways, support to launch, and promoting the project to staff and patients. Therefore, contract 'value' may be better assessed holistically and over three years.</p>

		<p>the Universal Offers for libraries is underway, with a growing interest from Government in the role of libraries in health.</p>	<p>Focusing more on geographies will enable us to focus more energies on key relationships. We will also need to strengthen profile at central Government level.</p> <p>Demand for evidence varies between commissioners and isn't consistent, yet some commissioners have fed back that the value proposition needs to be clearer. We will work with commissioners to strengthen this and our longitudinal research project supported by National Lottery Community Fund will strengthen our evidence base further.</p> <p>Despite profile for social prescribing, the initial investment announced is for the mechanisms to affect referrals, rather than to support the community-based activities themselves.</p> <p>There are constrained library budgets and stretched resources on ground to co-deliver groups.</p>
<p><b>Children and young people</b></p>	<p>Income generated through Storybarn ticket sales. We will again be aiming for a break-even position year-on-year, reached through a revenue model based upon 70/30 revenue split between school bookings and the general public.</p>	<p>Education work will be strengthened as the Mansion House opens and a Heritage offer is added.</p> <p>We have developed a strong school market and reputation, and the addition of the Heritage offer when</p>	<p>The schools market is very crowded and still a strong emphasis on literacy outcomes for work in schools.</p> <p>School budgets are tight and we will need to have a clear product</p>

	<p>To support this it will also be important to:</p> <ul style="list-style-type: none"> <li>• Obtain at least one sponsor.</li> <li>• Seek opportunities for grant funding to help support innovation and creative development.</li> <li>• Continue our investment in, and effective management of, sales team capacity.</li> </ul> <p>We will only proactively seek additional work with children and young people as a beneficiary group in the North West, connecting to Calderstones and our flagship projects.</p>	<p>the Mansion House opens will strengthen this and help to increase sales.</p> <p>There are potential opportunities to deliver another Storybarn offer on an additional site, through either direct delivery or a franchise model. However, future opportunities will not be proactively sought in this area until the Mansion House work is established.</p>	<p>offering in order to respond to enquiries efficiently.</p> <p>While Storybarn 'on the road' is a replicable model, a capital investment would be needed to look at any future development.</p> <p>Return-o- investment might make a franchise model difficult to achieve.</p>
<b>International</b>	<p>We will work to sustain the current level of income received. This will include building on current relationships and working reactively, responding to requests for training and collaboration when they arise.</p> <p>Assuming little growth in Northern Europe, as we have established Train the Trainer models in many countries.</p> <p>Potential growth in US, Canada and Australia</p>	<p>Build a formalised network of International Shared Reading Communities, which will help attract international visitors to Calderstones to see the home of the reading revolution. Strong conversational sense of interest in Calderstones.</p>	<p>People we have trained in other countries can and have started to sell training, such as Denmark selling into Brazil.</p>
<b>Publications</b>	<p>During 2019, The Reader will develop a commercial strategy both for Publications and The Reader merchandise, to generate new</p>	<p>We have a record of producing publications; <i>A Little, Aloud</i> series, published through Chatto, part of the Random House group; The</p>	<p>Will need to recruit new people to rethink and relaunch The Reader magazine and bring fresh commercial experience to the team.</p>

	<p>forms of income and raise brand awareness. Very limited work has been undertaken in this area in the past, therefore we have projected a conservative income growth from £12,000 to £38,000. Longer-term projections and resource requirements will need to be produced.</p>	<p>Reader magazine, published in-house; and Reader Anthologies, produced in-house.</p> <p>To tie the development of the magazine in with the scaling of Shared Reading, we will develop new editorial and marketing policies, with the overall aim of broadening circulation to new audiences and increasing our subscribers.</p> <p>As an Arts Council England NPO, we have access to expertise and potential partner organisations.</p>	<p>We will need to explore and develop distribution partnerships.</p>
<p><b>Individual and corporate donations</b></p>	<p>We will need to increase our annual income from corporates and individuals from £66,000 in 2017/18 to £144,000 in 2021/22 (income in 2018/19 is skewed by a one-off donation in relation to Treasure Island).</p> <p>Assumptions based on;</p> <ul style="list-style-type: none"> <li>• Increasing membership of Friends scheme.</li> <li>• Running either an annual fundraising campaign or launch new Patrons Scheme.</li> <li>• Successful sales to corporate marketplace.</li> <li>• Securing corporate sponsorship for the Storybarn.</li> </ul> <p>We have completed a consultancy project exploring the potential</p>	<p>Shared Reading has been shown to deliver improvements in employee wellbeing and skills development, aligning well with employee engagement, retention and mental health workplace agendas. A corporate partnership with Epic Private Equity will give us the opportunity to co-develop corporate workplace Shared Reading products and test market response.</p> <p>We have raised £101,000 from two individual-giving fundraising campaigns in the last two years, which demonstrates the potential of this area, particularly as The Reader is growing a larger, more connected network of people and is about to open Calderstones. We</p>	<p>We haven't grown an Individual Giving scheme before. Our Friends scheme is new and we haven't invested in promotion yet, so it's too early to evaluate.</p> <p>Insight indicates that corporate budgets in the Liverpool City Region are tight.</p> <p>We have limited experience in the team in individual giving. Both Development and Communications team are stretched – further market testing needed before we assess what, if any, additional resource or training would be required to fulfil potential and grow further.</p>

	<p>audiences, drivers and products for individual giving. More work is needed to test assumptions in this area, to inform longer-term investment decisions and growth potential</p>	<p>have built a small donor base through these campaigns.</p> <p>The opening of the Mansion will give us a unique moment to refresh public fundraising products, show potential donors our work in a tangible way and provide opportunities for donors at different levels to engage.</p>	
<b>Property</b>	<p>Since The Reader has operated the Mansion House, we have had good demand for office accommodation, with the available space full occupied available fully occupied until the house closed for refurbishment. The price paid per square foot has ranged from £3.62 to £19.20, and has been attractive to a number of tenants including artists, landscape designers, a motivational management team and carbon emissions consultant.</p> <p>We will generate revenue through the letting of commercial office space in the Mansion from FY 2019/20 to likeminded organisations, as well as continuing to let the Coach house and outbuildings to the existing tenant. The total projected income for 2019/20 is approximately £40,000 with a small percentage of growth year-on-year over the period.</p>	<p>Unique setting within the park.</p> <p>Opportunity for tenants to contribute to aims of site.</p>	<p>Untested price point for mission focused organisations, so further refinement likely.</p>

<b>CIC Income</b>	<p>The five-year business plan for the CIC articulates our plans for expansion of the Café, continuation of the Ice Cream Parlour, as well as launch and development of Events and Retail businesses on site at Calderstones.</p> <p>All profits generated are gifted back to The Reader, making a significant contribution towards overhead costs.</p> <p>During years 2019/20 and 2020/21, the CIC will make substantial cost contributions but relatively modest profit returns as the businesses absorb startup costs. By year five, the estimated profit return to The Reader is £90,000. Full details can be seen in the CIC Business Plan included in the appendices, including further information on track record and assumptions.</p>
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## 15. Risk and Environmental Strategy

### 15.1 Risk

The Reader is committed to sound business practice and the embedding of risk management into the organisation's culture. A Risk Management Policy is in place across The Reader Group and separate risk registers are in place for The Reader, the CIC and the Mansion House Capital Refurbishment Project. The risk registers are used to gain a comprehensive view of the work of the organisation, and reveals strengths and opportunities, as well as weaknesses.

Risk assessments involve staff from across the organisation. The formal risk register is reviewed by the Audit Committee at each meeting, with high-level risks being reviewed by each respective Board, and the capital risk register being reviewed by the Capital Committee. The Directors' Group reviews The Reader risk register on a quarterly basis and the CIC risk register is reviewed by the Calderstones Team. Each risk on the risk register is assigned an owner, who is responsible for monitoring the risk and ensuring that action is taken to mitigate it. The register details the steps and procedures in place to mitigate risk.

### 15.2 Environment

We recognise that the organisation's activities impact upon the environment through routine internal operations, infrastructure development, and our influence and effects on the wider community. We are committed to protecting the environment at all levels and to complying with environmental legislation. We have an Environmental Policy and an action plan outlining our commitment to controlling our environmental impact by preventing pollution wherever possible, and making a commitment to continuous improvement and review.

We have committed to undertaking data collection in relation to improving environmental performance and reducing carbon emissions in three key areas: energy, waste and water. The organisation intends to undertake additional training through the Arts Council England network when it is available.

As part of the capital refurbishment project at the Calderstones Mansion House, The Reader is implementing a range of environmental measures, including solar panels, which together will improve the energy rating from an F to a D.

## 16. How we will Monitor this Plan

Each year an operational plan for the current year will be included in Appendix I of this Business Plan, which will breakdown the organisational objectives into those that are to be delivered within the year. The operational plan will include a dashboard that will then be reviewed by the Directors Group on a quarterly basis and RAG rated in line with the following:

<b>Green</b>	Complete
<b>Amber</b>	In progress or on track
<b>Red</b>	At risk of not achieving before year end or behind schedule
<b>N/A</b>	No longer applicable or not yet due to start

A monitoring report will be submitted to the Board of Trustees on a quarterly basis following this review.