

Our Plan



Introduction



We recognise being able to leave our home, access different places and spaces, and to see the people who matter most to us are vital and essential parts of life. Through the recent periods of lockdown we have all experienced how it feels to be denied those things; yet many disabled people tell us that struggling with inclusion and social connection in an inaccessible world remains the norm.

Motability has worked for 44 years to address the disadvantages that disabled people have faced when it comes to accessing transport. Motability's Governors and I proudly endorse these pages setting out Motability's plans for the next five years, as we intend to do even more to support and empower disabled people, including those with less visible disabilities, to gain the same access to public and private transport as everyone else.

We have always known that we make a huge difference to people's mobility and quality of life from the many thank you cards, letters and calls we receive from beneficiaries. With the new evidence that underpins this report, we can clearly demonstrate this.

Please do get in touch if you would like to know more about the difference we make and how we make it. We would be delighted to hear from you.

Charles Manby MBE
Chairman



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Our Plan

Motability exists to support and empower disabled people by improving their access to transport.¹ We are proud of our history; the Motability Scheme and our grant-making have changed millions of lives. And with our Endowment, and the resilience that it gives us, we are now able to do even more. Our vision is that no disabled person should be disadvantaged by poor access to transportation. Our research with disabled people demonstrates that there is a long

way to go to achieve that vision and that Motability will therefore have a crucial role in supporting disabled people with their mobility for years to come.

This review sets out the steps that we will take to continue to work with others towards that vision over the coming five years.

The Board of Governors endorse this paper with a five-year horizon and a review point after three years.

94%

of those who received a grant for a vehicle told us that they would not have been able to get a vehicle that met their disability needs without our help

¹ Motability's charitable object is to facilitate the relief and assistance of disabled persons in connection with the provision of personal or other transportation.



Our Responsibilities and Intent

We work hard to ensure that the Motability Scheme continues to meet the needs of disabled people, that it provides access to a wide choice of vehicles, that it remains sustainable and that it provides excellent service and value for money. We aim to ensure that the Scheme continues to secure the support of Government and other stakeholders, including the principles of universal service at uniform prices and cross-subsidies to improve affordability for those with more complex needs. We recognise that Government legislation and related tax advantages give us a unique route to enable disabled people to exchange mobility allowances for a lease on a vehicle, and we take that responsibility very seriously.

While changes in the means of transport and Government policies relating to disability and mobility support evolve, we will remain focused on maximising the impact that we can make for disabled people. We do this not only

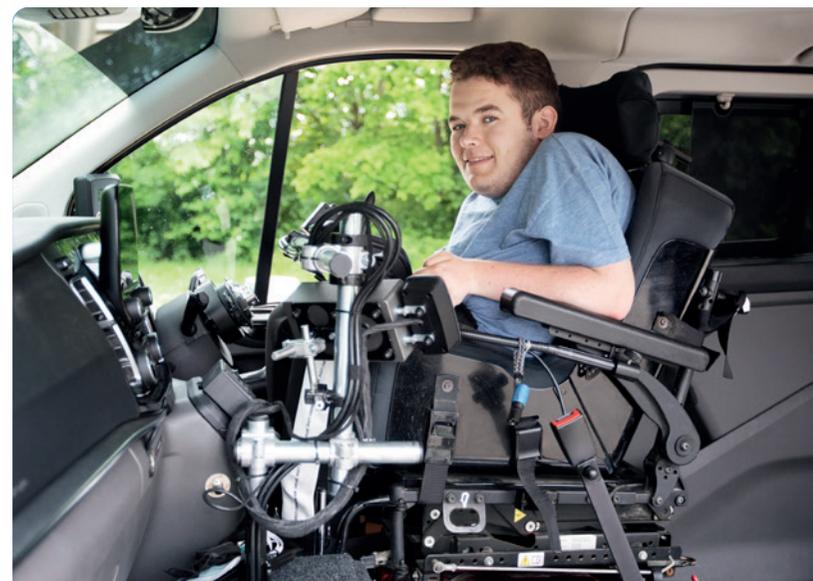
through the Scheme but also through our charitable grant programmes, through which we gave direct support to almost 26,000 disabled people in 2019/20, and have benefitted 69,000 disabled people over the last five years. We will also develop our understanding of the problems that disabled people face, and identify and develop new ways to address them.

We recognise that public social benefit for disabled people is core to our strategy. The Scheme benefits from substantial tax advantages, and through our grant-making activities we are able to enable beneficiaries to access the Scheme, and to help Scheme and non-Scheme customers in other ways.

We recognise that there are 1.2m recipients of the relevant allowance who choose not to use the Scheme, and we will work closely with Motability Operations to look at whether and how the Scheme can evolve to meet the needs of some of these recipients.

We also recognise that there are 6.5m disabled people in the UK who could potentially benefit from better access to transport. We also recognise that the Motability Scheme is our most important means of meeting our charitable objects.

We recognise that, through the Scheme, we provide a high quality service to 640,000 loyal and satisfied customers, and that through our grant-making we enable 13,000 people per year to access the Scheme who otherwise would not be able to do so and assist 12,000 others. We are to determine the direction of the Scheme and how it delivers public benefit (as our major intervention), to make grants to assist beneficiaries onto the Scheme, and to make grants to the wider disabled community. Our challenge is to continue to do so and to examine ways in which we can help more disabled people.



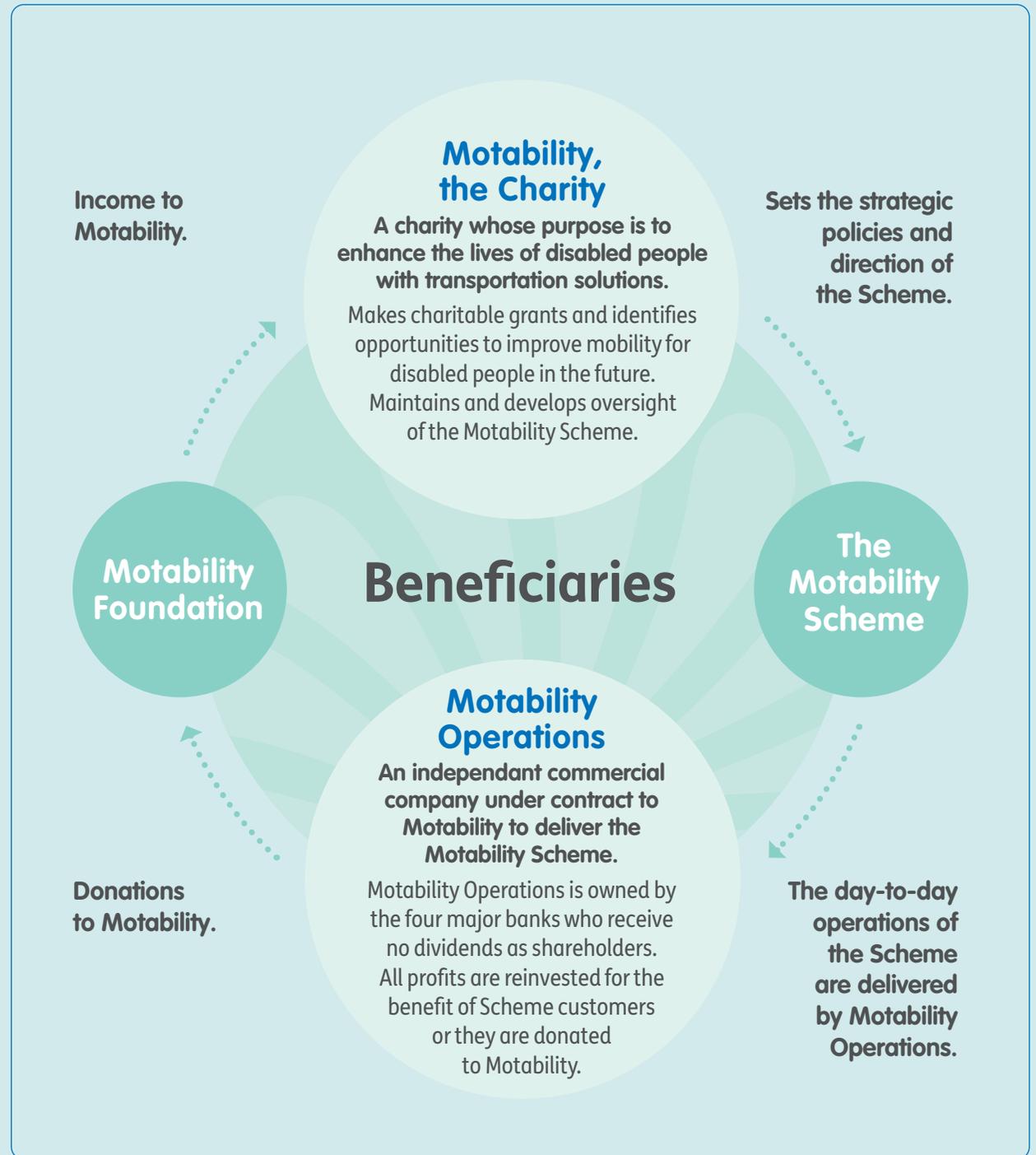
OUR VISION:

That no disabled person shall be disadvantaged due to poor access to transportation

Our Economic Model

As the diagram opposite shows, Motability sets the strategic direction of the Scheme, but the Scheme is run day-to-day by an independent company, Motability Operations, who are consulted. Under the terms of our contract with them, Motability Operations aims to make a small return on its capital asset base each year in order to demonstrate its health to the investors who finance the purchase of Scheme vehicles. This return is either invested in services to customers, retained to provide capital for future growth expectations, added to reserves

to ensure the future sustainability of the Scheme, or donated to Motability or the Motability Foundation to support wider charitable activities. The frequency and quantum of these donations is therefore difficult for Motability to predict. Our current rate of grant-spending is higher than our expected rate of distributions from the Endowment by a significant factor, and therefore we will be reliant on future donations from Motability Operations to be sustainable in our grant-making activities at the current rate.



The Motability Foundation

The Foundation is an Endowment trust, established in September 2019.² Its sole purpose is to support Motability and we share the same charitable objects. Its funds came from Motability Operations and Motability Tenth Anniversary Trust donations in 2019/20, totalling just over £1,000m.

Motability's Board of Governors has taken a strategic decision to invest these funds and maintain the real spending power of the Endowment to benefit current and future generations. It is intended that the Endowment's capital should only be drawn upon to fund exceptional opportunities to improve transport

access for disabled people, and not drawn on as a buffer to variability in donations from Motability Operations. Conversely, there is no strategic intention to place future donations into the Endowment.

We expect to spend 3-4% of the Endowment's value on an annual basis, consistent with our return expectations for its investments, so as to maintain the real value of the Endowment. We are mindful that the right inflation rate for our grant-making capacity may differ from a general inflation measure such as CPI, and we will seek to understand the appropriate inflation rate.

Current unrestricted Motability funds (largely the £400m donation from Motability Operations in September 2018) are enabling Motability to extend and sustain grant-making programmes and introduce new initiatives over the next four to five years. The Foundation will not be able to provide enough income to provide for this level of ambition, and future donations from Motability Operations will be necessary if it is to be maintained after this period.



² Legally registered as The Motability Endowment Trust with the Charity Commission in England and Wales as a linked charity to Motability under registration number 299745-1. The Foundation does not prepare separate financial statements; its results are presented within Motability's consolidated financial statements in the Endowment column. The Foundation's investment advisers are Lane Clarke and Peacock. The Foundation has an evolving responsible investment policy.

Grant-Making

Our grant-making is currently split into three categories:

- Scheme-Related Grants (£51m in 2019/20) which enable those on lower incomes to access the Motability Scheme by supporting them with the costs of advance payments and adaptations to vehicles.
- Access to Mobility Grants (£19m in 2019/20) which benefit other disabled people, for example by offering driving lessons; and include currently time-limited grants for those unable to transition from the Government’s Disabled Living Allowance to Personal Independence Payment.
- Special Grants (£0.8m in 2019/20) to other charities and organisations supporting disabled people with their mobility, including to support innovation.

61%

of Motability grant recipients reported a significant or life-changing improvement in feeling safe and secure when they go out since receiving their vehicle.

80%

of grant beneficiaries strongly agreed or agreed that they felt better in themselves as a result of getting the vehicle.



Case Study: Meet Isaac

Isaac lives in Suffolk with his mum, Sarah, and younger brother and sister. He has two live-in carers who have become part of the family

Isaac received a grant towards his Wheelchair Accessible Vehicle (WAV), which he travels in with his mum and carers. Before he got the grant and joined the Motability Scheme, Isaac and his family weren’t able to travel together. “My mum had an old car that broke down a lot. There was never enough space for my brother and sister to come out with me

as I need a carer to sit next to me while travelling. Having the Motability vehicle has made such a difference. Being able to travel in my wheelchair is safer, more comfortable and vital to my wellbeing. It also means my family can travel with me and we can all do things together now.” Isaac enjoys swimming and attending a resource centre where

he takes various classes, including cooking and computing. “My favourite activity is swimming – it helps me move my arms and legs, and prevents pain. I love music too and went to a festival last year where I saw George Ezra – it was very exciting. I can do all the things I love most now thanks to my Motability vehicle.”

Our Progress and Goals

In 2019 we undertook a high-level review of our intent and economic model to develop a longer-term strategy that will enable us to move towards our vision. We identified five pillars and 11 goals. After two years we have achieved three of these goals and made significant progress against a further six. We have also worked closely with Motability Operations, and continue to do so, to understand the implications of the transition to electric vehicles for the Scheme and its customers.

Our strategic pillars endure:

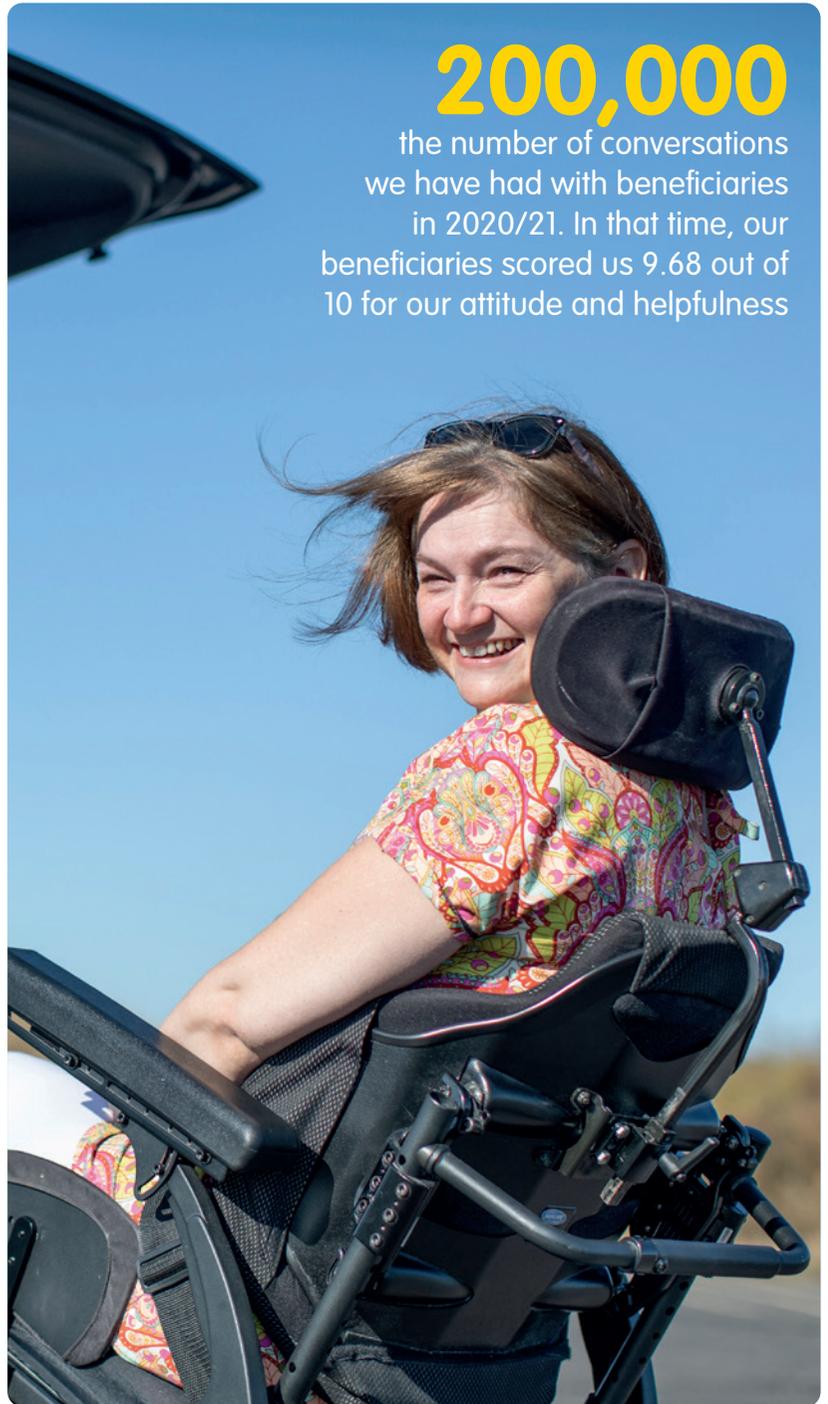
- to ensure the success of the Motability Scheme in meeting the needs of disabled people
- to use charitable funds effectively to address the transportation needs of beneficiaries
- to build awareness and engagement

- to constantly look for, and develop, new ways to meet the evolving transportation needs of disabled people
- to provide the highest level of service to meet the transportation needs of disabled people all underpinned by a strong infrastructure and an empathetic, evidence-led culture

We have, however, reviewed and refreshed our goals and objectives:

The Motability Scheme Pillar addresses our goals with respect to the Scheme. These cannot be achieved without a close and effective working relationship with Motability Operations at all levels, and with a strong mutual understanding of respective roles and responsibilities. Innovation and decisions upon investment therein will be an important dialogue over and above routine oversight

activities. To illustrate, research tells us that finding accessible charge-points, running out of charge, the cost of electric vehicles, and the availability and affordability of Wheelchair Accessible Vehicles are considered the biggest challenges by beneficiaries and Scheme customers on moving from internal combustion engines. Motability and Motability Operations must work together to decide where and how surplus finance should be invested, for the best public benefit, on these issues.



Our Five Strategic Pillars

Motability Scheme



Ensure the success of the Motability Scheme in meeting the transportation needs of disabled people

Our goals

- Ensure good value for money and high levels of customer service are delivered across the UK
- Ensure that the Scheme is financially and environmentally sustainable and efficient
- Ensure our oversight of the Scheme is effective and transparent

Grant-Making



Use charitable funds effectively to address the transportation needs of beneficiaries

Our goals

- Ensure our grant programmes deliver maximum impact for beneficiaries and value for money solutions
- Improve the ways in which our beneficiaries access our assistance and high levels of service
- Use our expertise in disability, transportation and grant-making to assist more beneficiaries
- Continue to develop evidence-informed grant programmes to meet the current and future transportation needs of our disabled beneficiaries

Build Awareness and Engagement



Build awareness of, and trust in, the work of Motability, listen to the views of disabled people, their organisations and other key stakeholders, and take account of them when we make important decisions

Our goals

- Improve awareness and understanding of our charitable work, including oversight of the Motability Scheme
- Actively listen to, and learn from, others who can inform and educate us, especially those with lived experience
- Involve the right stakeholders in our decision making and share information about the decisions we make and our reasons for making them

Innovation



Constantly look for, and develop, new ways to meet the evolving transportation needs of disabled people

Our goals

- Amplify the voices of disabled people when important transport policy and design decisions are made, including along the journey to zero-emission transportation and future technology
- Explore opportunities to improve the provision of community and door-to-door transport for disabled people
- Improve our understanding of the mobility needs of disabled people, especially those who receive mobility allowances, beyond vehicle leases, and seek out new opportunities to meet these needs

Disability Charity



Provide the highest level of service to meet the transportation needs of disabled people, underpinned by a strong infrastructure and an empathetic, evidence-led culture

Our goals

- Ensure we have a strong and sustainable infrastructure including the continuing development of our people, skills, systems and ways of working to enable our goals to be achieved
- Continue to champion our values and behaviours that place our beneficiaries at the centre of all we do – ensuring that we keep striving to fulfil our vision, and meet beneficiary needs in the most relevant and productive way

Our Consultation and Engagement

In the shaping of this review we have consulted almost 14,500 disabled people, healthcare professionals and others, and have analysed data from more than 13,000 households. In 2020 we established a sector-leading research programme which explored the transport challenges that disabled people face in depth, with partners including the National Centre for Social Research, Britain Thinks and the Transport Research Laboratory. We have also worked with the Research Institute for Disabled Consumers to establish exactly how Motability makes a difference to people’s quality of life, and established a programme

of evaluation work to help us better understand the impact of our current programmes.

We have also increased our engagement and dialogue with other disability charities in order to raise awareness of what we do and build new partnerships. We hope to deepen and expand this dialogue over the course of the strategy period.

Our close dialogue with Governments will continue, particularly on the devolution of social benefits and the transfer of allowances.



Case Study: Meet Gino

Gino lives with his parents in Fife. His mum, Charlene, leases a Wheelchair Accessible Vehicle (WAV) on the Motability Scheme

“Before Motability, we used to have a vehicle, but it was not wheelchair suitable. I found out about the Motability Scheme and applied for a grant for a passenger WAV so we could get Gino in and out of the vehicle whilst he is in his wheelchair. Gino has 1p36 Deletion Syndrome which causes epilepsy, global

developmental delay, hearing loss and respiratory problems. He is a full-time wheelchair user,” Charlene explains. “If it wasn’t for Motability, we would still be struggling. We wouldn’t be able to afford a suitable car for Gino without them. The vehicle is so much easier to transfer Gino into and out of now

he is getting older and heavier. He loves water play and getting out in the vehicle. We are now able to take him out as a family. Motability are the easiest, most helpful company we have had the pleasure of speaking with. They make the whole process so easy and stress free.”

Our Programme Development

Our growing body of knowledge and connections is enabling us to develop new routes to impact. We have identified two broad priority areas under our innovation pillar:

Priority Area One

Amplifying the voices of disabled people where important transport policy decisions are being taken – for example; in ensuring that electric vehicle charging is accessible for the 1.35 million disabled people whom we predict will be reliant on public charging infrastructure

Priority Area Two

Improving door-to-door and community transport for disabled people who do not have access to a car. In the future we will research, and may also develop, new grant programmes to address unmet

needs, or work with Motability Operations or other partners to develop new products and services including the transfer of a state benefit for such products and services.

We now have a strategic prioritisation framework which helps us to identify those programmes and interventions which offer the strongest potential for Motability to improve mobility for disabled people at scale, based on our aspirations to make a difference, the opportunities available and our own capabilities. We will also evaluate our impact using an outcomes framework which shows the ways in which Motability seeks to make a practical difference to the lives of disabled people.



Case Study: Meet Stuart

“I couldn’t bear the thought of life without my Motability car. Motability is such a wonderful thing. I really sing its praises. It has made many positive contributions to my mental health.

I am now able to volunteer 30 to 40 hours a week. I feel I am paying back to society. Before I had my Motability car, I couldn’t do anything like this, I was stuck in the house.”

Our People and our Values

The last two years have seen a 27% increase in investment in staff supporting our Grant-Making, Innovation and Scheme pillars. Looking ahead, our emphasis will be on capability rather than capacity; 66% of staff will be employed in grant-making directly. The programme development approach described above will determine future investment.

We plan to build our proposition as an employer based on our identity as a charity and our values. One of our supporting objectives is to acquire and retain talent through this proposition, reinforcing our strength of purpose,

enabling employees to easily see themselves and their role as integral to our success. There will be a focus on reducing pay gaps for gender, diversity and ethnicity, and promoting inclusion across the charity especially for disabled people.

We hope that our staff will reflect our five values (opposite) in their work through our supporting behaviour framework. These values are deemed to remain highly relevant although they might be combined to four in order to be more memorable.



OUR VALUES:

- We work together to enhance the lives of disabled people
- We encourage a culture of continuous improvement
- We have empathy and are respectful to everyone
- We listen, are practical and approachable
- We value the expertise of everyone we work with

Conclusion

This strategy sets the intended general course of Motability for the next five years. It will be reviewed fully after three years, but Governors will make necessary adjustment, notably managing volatile income, through the yearly and half-year reforecast budget

processes. This will enable us to maintain our focus on core activities and to develop our wider impact. Motability will continue to develop as an organisation that can support and sustain these ambitions, bringing empowerment and opportunity to disabled people.

30%

of disabled people do not have access to a car in their household vs 15% of non-disabled people

Secondary analysis of the National Travel Survey 2018
(NatCen for Motability, 2020)



Our Plan



Motability, the Charity, Warwick House, Harlow, Essex, CM19 5PX

Motability is a Registered Charity in England and Wales number 299745 and a Registered Charity in Scotland number SC050642, and is authorised and regulated by the Financial Conduct Authority, reference number 736309.

[motability.org.uk](https://www.motability.org.uk)