



Isle of Wight

# Strategy & Implementation Priorities 2006-2009

*Age Concern Isle of Wight is a local, independent, registered Charity No. 265762*





A couple were referred by their local councillor:

A visit was undertaken within a week of the referral and identified the following issues:

- 1 Entitlement to Attendance Allowance – forms completed by a welfare benefits volunteer and both were awarded higher rate increasing their joint income by £121.20 pw
- 2 The need for aids to use both the toilet and the bath – referred to Social Services for an Occupational Therapy assessment to reduce the risk of further falls
- 3 The need for a home security check and smoke detectors - referred internally to the Home Safe project and work carried out
- 4 The need for regular meals – information was provided about alternatives to Meals on Wheels as this had been tried but not liked
- 5 The need for help to attend medical appointments – information provided on the voluntary transport scheme Optio
- 6 The need for shopping, respite and socialising for one of the partners – informed about a variety of options and chose to go shopping once a week with an Age Concern IW shopping volunteer thereby providing a break and an opportunity to get out
- 7 The need for help with household chores – information provided about domestic agencies to help with cleaning that they can now afford because of receiving Attendance Allowance

**This holistic approach to supporting clients has enabled Age Concern IW to consider every issue raised and address it. Providing support and security to this couple and enabling them to continue to live independently in their own home**

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## **Age Concern Isle of Wight**

Age Concern IW is an independent, local, registered charity whose purpose is to ensure that the needs of individuals aged 50 and above and living on the Isle of Wight are recognised, highlighted, celebrated and supported either through direct service provision or by working in partnership with others.

Age Concern IW is also a member of the Age Concern Federation which enables us to report local interests at a regional and national level.

Founded in 1973 as an independent unincorporated association, Age Concern Isle of Wight currently has five key functions:

- Development and delivery of services and support
- Public awareness raising, education and social advocacy
- Innovation and research
- Partnership and co-operation
- Support for local Age Concern Groups

This Strategic Plan has been developed in two ways:

- By observing and responding to key trends, local and national policy initiatives that have been developed over recent years in health and social care, safer communities and the changing relationship being encouraged between the Statutory and Voluntary sectors
- Through a series of events that brought staff, trustees, volunteers, stakeholders and clients together to explore the current and future purpose of the organisation which included looking at the Mission, Values, Strategic Objectives, Service Priorities, and Resource implications.

The outcome of these discussions and negotiations has been the development of a number of key strategic objectives that have created a focussed strategic plan to ensure a strong, sustainable organisation over the next three years and beyond.

Additionally the opportunity to listen to others and share ideas has generated a series of service development ideas that are expanded on in service development and operating plans.

## Mission, Values and Strategic Objectives

Through a series of 'away day' events with staff, trustees, volunteers and older people, Age Concern IW has re-visited its mission, values and strategic objectives to ensure that it is meeting the needs of the Island community, and specifically those over the age of 50 years, now and for the next 3-5 years. The following will form the philosophical core to Age Concern IW's work:

### Mission

Age Concern Isle of Wight's mission is to promote the status and well-being of older people living on the Isle of Wight and to make later life an enjoyable and fulfilling experience.

### Values

The principles and values that Age Concern Isle of Wight works to are as follows:

**Client-focussed** – caring about, listening to and involving older people to design and deliver services and activities that are personalised and truly meet their needs and aspirations

**Inclusive** – offering support to all people over the age of 50 whilst being particularly mindful of those who are vulnerable and isolated

**Enabling** – supporting and empowering older people to have the confidence and opportunity to live as they choose

**Professional** – being a dependable, trusted and respected organisation committed to ensuring a fair, reasonable, non-judgemental and consistent approach to all older people

**Accessible** – being welcoming, approachable and available using a variety of methods to meet client need with a local focus to our work

**Campaigning & Influencing** – promoting the interests of all older people, ensuring that their voice is heard and working against discrimination in all its forms

"Age Concern Isle of Wight is an enabling and delivery mechanism to support the needs of older people living on the Isle of Wight.

I am committed as a trustee to support the organisation to develop strategically, enabling change and monitoring progress to ensure future evolution.

Locally, Age Concern IW is unique in its holistic approach to working with older people. It has a proven track record, showing imagination and creativity to develop new services as well as the enthusiasm and commitment to monitor, evaluate and campaign for good practice."

**Don Appleby**  
**Chairman of Trustees**

"It costs approx £600 per day to run Age Concern IW. Fundraising, effective contracting, partnership working and the investigation of social enterprise will become an increasingly essential part of the organisation's growth as it looks to maintain and increase its range of services and support to the most vulnerable in our community".

**Jo Dare, Director**  
**Ellen Weeks, Fundraiser**

**Dynamic & Visionary** – innovative and creative to find solutions to meet the needs of older people  
**Employer of choice** – fair challenging and supportive

**Strategic areas for improvement to meet the needs of older people living on the Isle of Wight:**

There are a number of key strategic issues that have been identified and need developing further by Age Concern IW in partnership with other organisations working with older people:

- Participation and representation of older people in the design, development and delivery of services
- Health and Social care
- Access and transport
- Community Safety
- Housing
- Income and employment
- Information, advice and advocacy services
- Lifelong learning and leisure

**Strategic Objectives**

To help us to focus on these key strategic issues, ten strategic objectives have been developed that will enable Age Concern IW to focus its work over the next 3-5 years. These are as follows:

- To be considered the first point of contact for all older people, their carers and professionals for all information and guidance supporting the needs of older people (SO1)
- To maintain and develop the direct provision of services that meets the need of older people in and around the Isle of Wight (SO2)
- To be a respected and professional organisation, extending partnerships and networks to develop strong, constructive working relationships (SO3)
- To devise and implement ways of increasing involvement of older people in the

**During the first year of the Welfare Benefits project we helped 384 people to fill in benefit claim forms and raised over £1/2 million in benefits for older Islanders.**

*Case Study:*

A lady approaching the age of 60 visited our mobile information van 'DAISY' unsure if she could claim benefits having suffered a stroke 2 years previously and struggling to continue to work.

She was referred internally to the welfare benefits specialist advisor who assisted the client to complete a claim for Disability Living Allowance. The lady was awarded middle rate care and lowest rate mobility (£58.15pw).

She has since been supported to gain information about tax changes when the State Pension commences and assisted with a Pension Credit claim gaining PC (Guarantee Credit) of £53pw and State Pension of £91pw. Due to the award of PCGC she also gets full Housing Benefit and Council Tax Benefit.

- development of Age Concern IW and its activities and services (SO4)
- To give older people a voice in order to influence local policy and service provision (SO5)
  - To identify and run campaigns which influence and enhance older peoples' life chances (SO6)
  - To develop a creative, adaptable organisation with a strong infrastructure, that can respond to identified need quickly and flexibly (SO7)
  - To achieve financial sustainability through generating sufficient income to support a well-managed infrastructure and direct delivery of services (SO8)
  - To be recognised as an employer that values it's staff by upholding the work-life balance and supporting their professional development through training and management support (SO9)
  - To develop a volunteer framework that values individual contribution through recruitment, training and support (SO10)

## Implications

### Funding

As Age Concern IW is an independent, registered charity, the outcomes identified through the strategic plan will only be able to be achieved if sufficient income is generated to enable organisational and service development.

Sufficient income across the organisation will enable staff to plan ahead with care and creativity to combine relevant services with value for money and not be diverted by insecure, time-limited funding that needs to be replaced.

For example, funding for information and advice (in the broadest context) has been difficult to achieve.

### **How we support and improve older people's mental health is a growing issue at a local and national level.**

Apart from feelings of depression and isolation recent reports from Public Health highlight the levels of suicide amongst older people on the Island.

ACIW runs a befriending scheme operating face-to-face and through telephone support providing friendship to those who are isolated for a range of reasons including lack of access to transport and bereavement.

"My doctor said he could prescribe some anti-depressants for me but he would rather I had a friend to talk to".

"My befriender is such a good friend to me, she is more like a daughter. We chat at home and prepare lunch together, or if my health is not too bad, we go out for lunch. I don't know what I would do without her".

"I really enjoy visits from my befriender...someone to talk to, who understands".

Currently a small grant is made available through Social Services of approximately £6,000 and the Trustees absorb the costs associated with the service into core budgets and reserves. However, much more needs to be invested from a variety of sources if Age Concern IW is to maintain and develop this service – a core function if older people are going to be able to make informed choices about their futures and professionals are to receive information to ensure the co-ordinated services they crave.

### **IT**

Through the Island Infrastructure Group (IIG) a grant has enabled the majority of our IT to be upgraded and training and maintenance to built into this.

With the capacity of the IT system there is now the opportunity to move from a paper-based client enquiry system that will save time during periods of monitoring and evaluation as well as provide the guarantee that every individual accessing the organisation for services and support gets assessed in the same way.

### **Quality Standards**

ACIW aims to achieve high levels of service and this will be evidenced through the achievement of Quality Counts a quality standard developed by the Age Concern Federation. Additional means will be investigated including:

- ◆ Investors in People
- ◆ Community Legal Service (CLS) standards
- ◆ PQASSO
- ◆ Charter Mark

The achievement of quality standards is compromised without appropriate funding and human resources.

**It costs over £250 per day to run information and advice, welfare benefits, advocacy and counselling services.**

As people get older many have to make key decisions about their housing and care needs. The Information and Advice service provides independent, impartial advice which is invaluable when trying to make informed decisions that impact on the rest of life.

Outreach is popular in reaching older people with over 1,600 enquiries in 2005. It has also enabled a 'one-stop shop' approach as a venue for partnership working with other statutory and voluntary sector organisations including the Pensions Service, Adult & Community Services, Sight Concern and Carers UK.

The Advocacy service ensures that trained and skilled volunteers are able to speak on behalf of older people when necessary or empower people to have the confidence to speak for themselves on a range of varied topics including housing, consumer and medical issues.

### **Organisational Structures and Human Resources**

Current organisational structures have been reviewed revealing the need to establish four 'departments' – Information & Advice, Quality of Life, Income Generation and Publicity and Infrastructure. A co-ordinating role in each of these areas will be identified and come together when required to form a strategic and management support function. This team will play a key role in monitoring and evaluation.

There is also a need to manage growth to ensure that, unless a time-limited project is required, staffing levels are stable and consistent throughout the organisation.

ACIW will need increased resources and funding stability to achieve this aim.

### **Financial Management**

Financial management systems will be reviewed to ensure best value and compliance with SORP.

**The Home Safe project provides essential support to older people in their own homes, enabling them to live more independently.**

This is achieved in a variety of ways:

- ◆ Home Security Check
- ◆ Fitting of home security devices including key safes and door chains
- ◆ Fire Safety Check
- ◆ Fitting of smoke detectors
- ◆ Falls Risk Assessment
- ◆ Advice on reducing the likelihood of falls connected to items around the home
- ◆ Handyman services

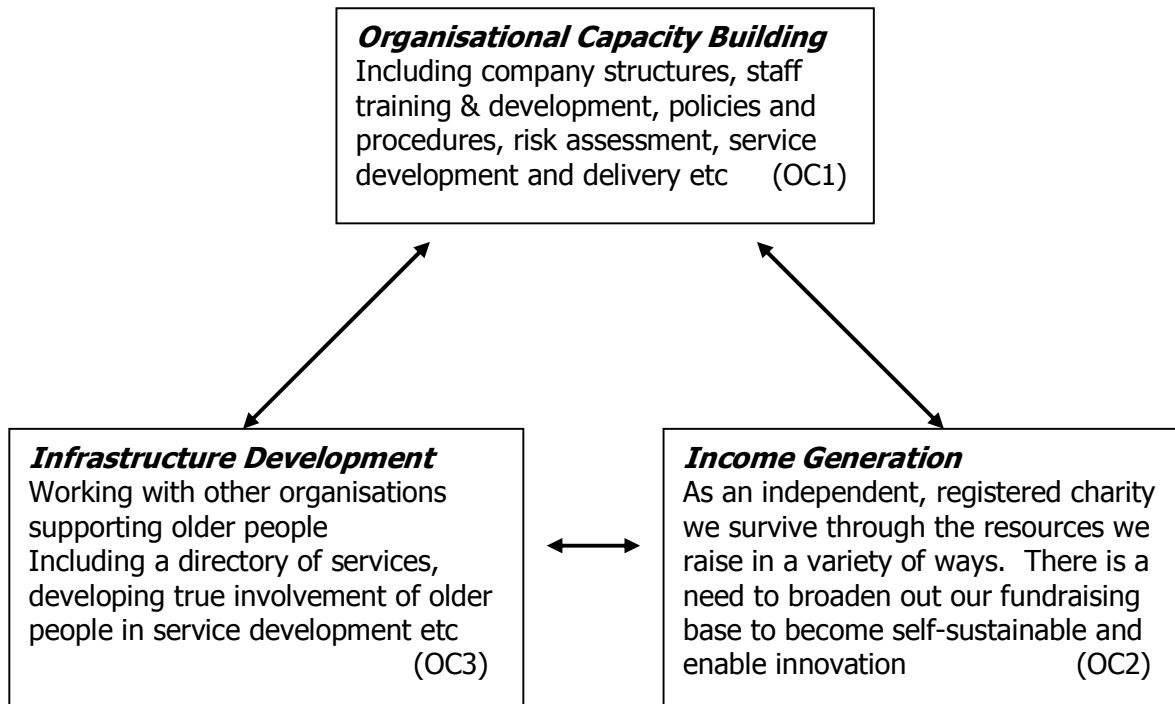
**The Shopping project offers older people the choice to either go shopping with a volunteer or if mobility is an issue, to provide a volunteer with a list from which to do the shopping on their behalf.**

Many clients are referrals from Adult & Community Services but older people can also self-refer. There is often a long-term relationship with the client and an assessment occurs before the service commences.

31 volunteers currently work with 69 clients.

## Implementation Priorities

To underpin the organisation, fulfil our functions and ensure success in meeting our strategic and service delivery objectives by 2009, Age Concern Isle of Wight will focus on three operational cornerstones each equally important in the drive towards sustainability:

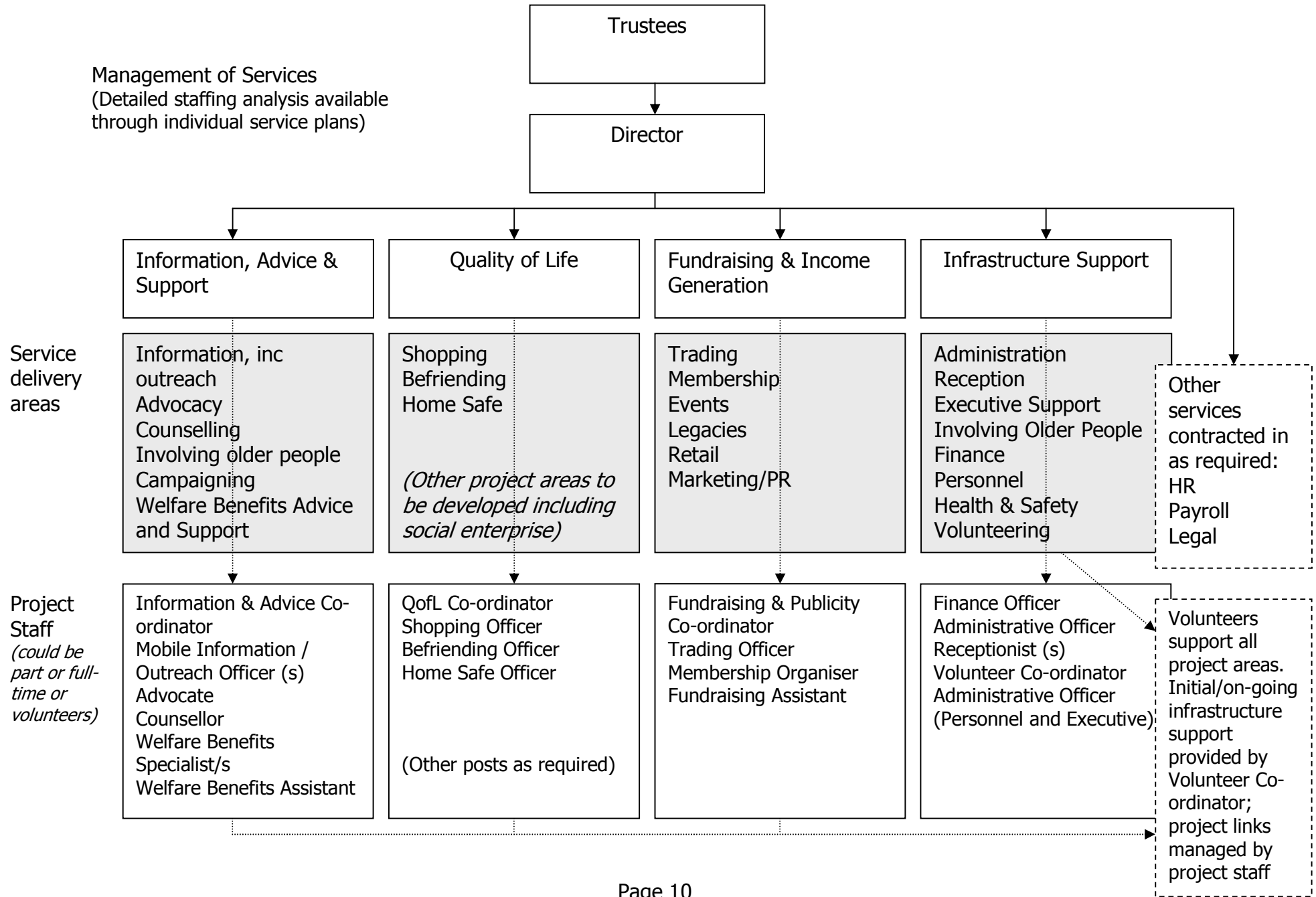


A review of Age Concern IW (ACIW) organisational capacity has been undertaken to be able to meet current demand and emerging opportunities, as well as taking a pragmatic view towards income generating potential to maintain the organisation.

As a result the management of services has been split into 4 departmental headings, each headed by a co-ordinator that becomes part of a senior management team. This will strengthen the organisation both operationally and strategically.

The following diagram illustrates organisational management structures incorporating service delivery areas and project management staff:

Age Concern Isle of Wight Implementation Plan 2006-2009



Each departmental area has developed a number of key development priorities over the next three years that we hope to focus on funding permitting. These are outlined below and expanded upon in detailed departmental operational plans that will form part of our monitoring and evaluation processes.

## **Infrastructure**

### Year 1

- Achieve incorporation and the establishment of organisational structures that can enable increased income generation
- Staff improve understanding of project development and management
- Achieve Quality Counts (internal Age Concern quality standard)
- Achieve improved communications to access ACIW staff (consider telecommunications/afternoon receptionist)
- Undertake an HR review to ensure continuing compliance with legislation and best practice (including training & development) and that meet the needs of work-life balance
- Undertake a review of organisational policies and procedures
- Review and maintain organisational risk assessment, including health & safety
- Undertake a financial review incorporating SORP
- Raise awareness of ACIW achievements
- Participate in the development of the voluntary sector through the Island Infrastructure Group

### Year 2

- Undertake a review of organisational policies and procedures
- Review and maintain organisational risk assessment, including health & safety
- Review strategic and operational plans
- Achieve PQASSO and Investors in People
- Undertake a review of the Executive
- Gain funding to appoint a Volunteer Co-ordinator; systems improved and best practice disseminated
- Review and develop an infrastructure role to develop voluntary sector organisations working with older people

### Year 3

- Undertake a review of organisational policies and procedures
- Review and maintain organisational risk assessment, including health & safety
- Review strategic and operational plans
- Achieve Charter Mark
- Improve support for the management team through appointment of a PA

## **Information & Advice**

There are 4 key roles of the Information & Advice service highlighted through the Implementation Plan:

- Working to support individuals and organisations *External* to ACIW including Welfare Benefits Advice and Support
- *Internal* support for staff and volunteers needing information and advice
- Involving older people
- Campaigning

### Year 1

Working to support individuals and organisations *External* to ACIW

*Internal* support for staff and volunteers needing information and advice

- Gain funding to properly resource a specialist Information and Advice Service for older people, their carers and professionals. To include an additional member of staff
- Recruit and train a team of information & advice volunteers
- Raise awareness of the importance of quality information and advice to empower older people to make informed choices and maintain independence
- Develop a leaflet for the Information & Advice Service
- Develop Client Enquiry Database to be used throughout the organization that will improve referrals internally to services and external signposting to other services
- Review compliance with Data Protection and Freedom of Information Acts
- Develop systems to enable all staff to offer a consistent service and ensure that each enquiry receives the same level of expertise
- Improve systems to monitor and evaluate the service
- Develop space for confidential interviews
- Develop and maintain an Older Person's Services Directory to be disseminated through a variety of means
- Recruit and train an information worker
- Gather statistical evidence to support staff in funding bids and service development etc

Welfare Benefits Service:

- Recruit full time welfare benefits assistant
- Apply for the CLS quality mark at casework level for welfare benefits advice

Involving older people

Campaigning

- Develop and maintain mechanisms to increase involvement of older people on the Isle of Wight
- Write an Involving Older People Strategy
- Investigate an Older Person's sub-group of the Executive that has an elected representative on the Board of Trustees

- Establish listening groups around particular campaign areas linked to ACE campaigns – eg. pensions
- Research innovative methods of consultation and participation
- Work in partnership to develop an Older Persons Strategy

## Year 2

Working to support individuals and organisations *External* to ACIW

*Internal* support for staff and volunteers needing information and advice

- Maintain an Older Person's Services Directory to be disseminated through a variety of means
- Review compliance with Data Protection and Freedom of Information Acts
- Gather statistical evidence to support staff in funding bids and service development etc
- Secure funding for a new, and more effective mobile/outreach service
- Develop the mobile service to increase accessibility
- Investigate and respond to the specific needs of diverse communities
- Develop advocacy service with the appointment of a paid co-ordinator and specialisms (eg housing, community care etc)
- Apply for the CLS Quality Mark for Community care at casework level
- Introduce a separate phone line for information and advice callers only serviced by an information and advice team

Welfare Benefits Service:

- Recruit and train a welfare benefits officer
- Recruit and train a team of welfare benefits volunteers

Involving older people

Campaigning

- ◆ Trial a new method of involving older people
- ◆ Increase membership of an older person's forum
- ◆ Hold a listening event

## Year 3

Working to support individuals and organisations *External* to ACIW

*Internal* support for staff and volunteers needing information and advice

- Maintain an Older Person's Services Directory to be disseminated through a variety of means
- Review compliance with Data Protection and Freedom of Information Acts
- Gather statistical evidence to support staff in funding bids and service development etc
- Investigate and respond to the specific needs of diverse communities
- Apply for CLS Quality Mark for the Advocacy Service
- Consolidate and evaluate the service to enable a further five year strategy to be written

Welfare Benefits:

Continue to ensure that the service is sufficiently funded have the capacity to meet the needs of older people needing to access welfare benefits

Involving older people

Campaigning

- ◆ Increase membership
- ◆ Hold a listening event
- ◆ Undertake campaigning

## **Quality of Life**

Currently there are three services delivered by ACIW that directly support quality of life for older people. These are:

- Befriending
- Shopping
- Home Safe (incorporating home security, fire safety, falls risk assessment and handyman jobs)

Over the next three years we will work to maintain existing services and to expand the services we offer that support increasing the quality of life for older people over the age of 50 on the Isle of Wight.

### Year 1

- Fundraise for a Quality of Life Co-ordinator who will also review our volunteering systems until such time as a Volunteer Co-ordinator can be appointed
- Review volunteer systems and implement improvements
- Develop a Quality of Life Assessment at the point of access to ACIW by an older person or their representative that will enable the projects to become more integrated and holistic and capture all unmet needs
- Review current structure of volunteer support and move towards a locality-based 'cluster' approach to support development of 'Active Networks of Support'
- Better partnership working with the Statutory Services and other specialist support charities to develop appropriate services

#### Befriending:

- Secure funding to maintain service
- Consider other methods of befriending

#### Shopping:

- Negotiate new shopping contract
- Consider new ways of organising shopping to be able to respond to client need
- Consider different ways of paying for the service to allow for the development of Internet shopping and reducing volunteer expenses through banking journeys

#### Home safe:

- Negotiate new funding with Police and Safer Communities
- Investigate funding from Fire Service for fitting smoke detectors
- Develop a specific handyman service

### Year 2

- Review the need for and opportunity to amalgamate the shopping and befriending projects
- Review Quality of Life assessment process
- Develop Hardship Fund

- Research the need for new services to support Quality of Life and make recommendations to Trustees
- Develop one new service, possibly through social enterprise model
- Fundraise for an intergenerational project

Befriending:

- Developing staff and volunteers with specialist skills particularly dementia and other mental health issues
- Increase levels of community befriending to including: Older person to older person
- Good Neighbour Scheme

Shopping:

- To provide training opportunities for volunteers who wish to specialise in specific areas of older peoples health ie dementia, perhaps even a lifting course so we are able to take wheelchair bound clients
- To provide opportunities for older people to go shopping together and perhaps meet for the morning, provided the problem is not mobility
- Actively recruit more volunteers

Home Safe:

- Investigate funding from PCT for falls risk assessment contribution
- Develop a specific gardening service

Year 3

- Need to develop a realistic and fair charging structure for those who can pay to enable projects to move towards sustainability

Befriending:

- Recruitment drive for more volunteers
- Intergenerational opportunities with schools
- Investigate and implement if appropriate 'Befriending on Prescription' allowing GPs/health professionals direct access to refer a patient who would benefit from befriending

Shopping:

- To actively recruit more volunteers
- To work more closely with other agencies to provide an all round service to older people, and be able to meet all their individual needs – associated with quality of life
- Continue to build of the opportunities for internet shopping

Home Safe:

- Investigate funding from PCT for falls risk assessment contribution
- Develop a specific gardening service

## **Fundraising & Income Generation**

### Year 1

- Develop infrastructure to be able to generate income effectively including annual calendar of events, volunteers, equipment/resources
- Garden Show
- Summer Ball
- Attend Island events
- Bid writing
- Local Authority contracts reviewed and developed
- Friends Scheme developed
- Heyday launched
- Establish Lifestyle Publication for 50+

### Year 2

- Give as You Earn Scheme
- Mass participation event
- Retail outlet
- Expand trading
- Support development of social enterprise

### Year 3

- Evaluate what generates maximum income and expand
- Legacies