



Shared Care Scotland Strategic Plan

2008 - 2011

Sustain, Grow, Innovate...

Our Values

As an organisation we want to be:

- for everyone with an interest in improving short break and respite services
- accessible and connected to those who use, manage, provide, plan or make policy on services
- responsive, responsible and accountable
- useful, practical and helpful
- a positive 'forum' where people can work collaboratively to exchange ideas and experiences and develop new approaches
- constantly innovating and campaigning, working at the leading edge, challenging and supporting the decision takers to raise their game
- a learning organisation evolving and developing with experience
- independent, ambitious, successful

About Shared Care Scotland

Shared Care Scotland has been in existence since 1989, incorporated as a charity limited by guarantee in October 1995. We are one of six national carer organisations in Scotland which represent, in distinct and different ways, the views and concerns of Scotland's increasing population of unpaid carers.

Shared Care Scotland is governed by a Board of Directors who represent a cross section of stakeholders including carers, service users, service providers and those who plan and commission services. Shared Care Scotland currently has two full time staff and two part time staff. They are: the Chief Executive, Administrator, Administration Assistant (part-time) and Book Keeper (part-time).

Purpose, Vision and Aims

The purpose of Shared Care Scotland is to support the development of imaginative, flexible, person-centred short break and respite care services across Scotland, for the benefit of all carers and care recipients.

Our vision is that all those with caring responsibilities, and the people they care for, will have regular access to high quality, affordable and appropriate short break services, which support the caring relationship and contribute to their health, well-being and quality of life.

We aim to be a strong, representative organisation and a leading provider of information, advice and support to all those who use, provide, plan or regulate short break and respite care services.

We believe passionately that the way to improve services is through partnership and shared understanding, and a determination by all concerned to work collaboratively to achieve common goals.

The 2008-2011 Strategic Plan

During 2006 the Board and staff completed a comprehensive review of the aims and purpose of the organisation, listening to client groups across the country from Inverness to Moffat, with a view to producing this Strategic Plan for the period 2008-2011.

The main goal of this three-year strategy is to build the capacity of Shared Care Scotland to respond to the growing need and demand for our services, but also to introduce innovative methods of promoting the development of short break services.

Core Activities

Over the next three years we will achieve our purpose by focusing our efforts on the following core activity areas:

- Collaborating with others on the advancement of high quality, flexible, person-centred short break and respite services
- Identifying and supporting the wider application of good practice through research, learning programmes, practice exchange events and development projects
- Strengthening the involvement of carers and service users in improving policy and practice at all levels
- Providing accessible, up-to-date information and advice to those who use, provide or plan services
- Making and sustaining connections at the local, regional and national levels
- Demonstrating excellent governance, efficiency and effectiveness within Shared Care Scotland

Achievements

Shared Care Scotland has played a key role in raising awareness of the importance of short breaks and respite to carers and service users, and shifting the focus of services away from institutional to alternative forms of respite. Our work has included:

- Commissioning research into respite outcomes;
- Publishing good practice guidelines to promote service development and improvement;
- Planning and delivering national and international conferences and events on a variety of themes, aimed at those who provide, commission and plan services;
- For carers and service users, we have developed an enquiry service with access to advice and information on a range of 'alternative' forms of short break services;
- Regular consultation on policy and practice development with central and local government, the voluntary sector and service users and providers;
- Close involvement with national initiatives including the recent Care 21 research project into the future of unpaid care in Scotland;
- Joint work with the national carer organisations including the development and implementation of the 2007 Scotland's Carers Manifesto campaign;
- We are currently serving on the Scottish Executive Task Group looking at resource needs for respite, which will advise Ministers on future spending implications.

Opportunities and Challenges

Over the last three years we have focused our efforts on national policy and strategy and this has, to some extent, reduced our visibility amongst carers, service users and local service managers and practitioners. Less time has been spent on developing practical resources or bringing people together at the service planning and delivery level to stimulate new thinking and approaches. Increasing the visibility of Shared Care Scotland across all our stakeholder groups, and developing services to support their

efforts, will therefore be an important focus for the organisation over the next three years, in addition to the continued policy development work at the national level.

We will develop our services to accelerate the pace of improvement in the range, volume and quality of short break provision. In doing so we will bring together those who plan, commission and provide short break services with carers and service users to build stronger working relationships based on mutual respect and understanding.

Through our practitioner networks we will support local authorities and partnerships to develop their strategies for short break services, in line with emerging national guidance. To improve the quality of information available to policy makers and service planners, we will establish and support regionally based Respite Forums led by carers and services users. A key role for these groups will be to monitor the impact of new policies and contribute to the development of new approaches.

We will continue to build productive strategic alliances with national organisations to amplify our vision and identify areas where enhanced benefits can be achieved by formal joint working. We will ensure that respite remains a high priority within national and local government and be ready to support initiatives that seek to improve provision.

We will launch a unique Online Short Break Information Service (OSBIS) providing a 'one-stop-shop' offering reliable, high quality information on all forms of short break services across ages and care groups. The promotion and implementation of this service to carers, service users and voluntary and statutory carer support services will be one of our highest priorities over the next three years.

Using OSBIS we will research and share examples of good practice and develop a range of resources to promote their wider application.

We will develop a Care Break Planning and Evaluation Tool and a DVD-based support pack to help individuals and families plan and prepare for a break, and provide the means for review and evaluation. We will promote the tool as part of a new learning programme aimed at health and social care practitioners. The programme will help practitioners in the effective planning and implementation of respite services, adopting person-centered approaches.

We will expand the content and distribution of our Breaking News newsletter, and optimise our online communication services. This will ensure people are kept up-to-date and involved with national developments. Through our conference programme we will highlight the key issues and provide opportunities for people to contribute to the future shape and direction of services.

In response to a more competitive funding environment, we will establish a more sustainable base for income growth. We will develop new income streams and ensure that our services are delivered in the most efficient and effective ways.

Fundamental to the achievement of all our objectives is the need to recruit, develop and retain capable and motivated people as Shared Care Scotland staff and volunteer Directors. These characteristics are evident in our achievements to date but there is scope for improvement, particularly in the development of people. This will be a key focus for the next three years.

Resource Implications

To achieve our goals, we will need to use our resources efficiently to sustain current levels of activity, and also find additional funding to support the new services and projects that are planned. Over the last 5 years we have benefited from Scottish Executive funding, recognising the important national role of the organisation. While needing to maintain a minimum level of financial support from the Scottish Executive, over the course of the 2008-11 Strategic plan we aim to diversify our income by looking to alternative sources of funding.

As an umbrella organisation our ability to generate significant income through the selling of services is limited and so fundraising will be largely directed at grant making trusts for project related costs. We will, where the criteria permit, include core or full cost recovery in our funding applications. We anticipate there will be some scope to earn income through our learning and development programmes and we will look at sponsorship for the ongoing costs of maintaining and developing OSBIS.

The main areas of expenditure over the next three-years will be staffing costs associated with the recruitment of a Communication & Information Manager, Learning & Development Manager and some additional administration to support these new posts. These posts are critical to the future development of Shared Care Scotland and the achievement of our core activities.

Recent investment in new office systems has significantly improved the efficiency of our work, particularly our information and communication services, and we expect further improvements as we learn to use these systems to their full potential.

Monitoring and Evaluation

A detailed list of outcomes for each of the core activity areas is published with this strategy. A detailed annual work plan and budget will be published in January for the year ahead – April to March – and this will inform the forward job plans for each member of Shared Care Scotland staff. The strategy and work plan will be distributed to Shared Care Scotland members and published on our website. The Board and the Business and Finance Committee will be responsible for monitoring the strategy and work plan. The Business and Finance Committee will focus particularly on the financial targets within the budget and the operational aspects of the annual work plan. This group will also be responsible for reviewing the performance of the Chief Executive.

Shared Care Scotland's Annual Report will be published in October each year to coincide with the Annual General Meeting. This will contain a review of work undertaken in the previous year and targets for the year ahead.

We will extend involvement in reviewing and planning our activities through our successful 'Have Your Say' programme of local events. These events bring together our Board members and staff with service users, carers and those who provide and plan services. The annual conference, AGM and website will also provide opportunities for people to input and influence the future shape and direction of Shared Care Scotland.

SHARED CARE SCOTLAND THREE-YEAR DEVELOPMENT PLAN: 2008-2011

Organisational Aim

The aim of Shared Care Scotland is to work collaboratively to promote the development of flexible, person-centred short break and respite services across Scotland, for the benefit of all carers and care recipients.

Organisational Objectives

1. To support the identification and application of good practice through research, learning programmes, practice exchange events and development projects
2. To strengthen the involvement of carers and service users in improving policy and practice at all levels
3. To provide accessible, up-to-date information and advice to those who use, provide or plan services
4. To make and sustain connections at the local, regional and national levels
5. To demonstrate excellent governance, efficiency and effectiveness within Shared Care Scotland

Organisational Objective 1

To support the identification and application of good practice through research, learning programmes, practice exchange events and development projects

Targets for this objective

2008-09

- Further development of the lead officer Sharing Practice Network (SPN) delivering two themed 'conference' events each year. (*Themes for 2008-09 will link to the implementation of forthcoming respite guidance and the development of respite related local outcome agreements*)
- Implement and promote an online practitioner support forum to encourage increased networking across areas
- Through consultation, identify priorities for future research to support the application of good practice in the planning and commissioning of services; identify potential funding and collaboration opportunities (*This work will help determine topics for Good Practice Guides. Link to Changing Lives Service Development Group*)
- Research and publish a practice guide on establishing a Short Break Bureau, the first in a series of publications to support wider application of good practice
- Secure funding to research and develop the Care Break Planning & Evaluation Tool (*to support National Outcomes and with links to User Defined Service Evaluation Tool*)
- Plan and deliver a 1-day 'themed' national conference aimed at all stakeholders
- In partnership with the Young Carers Services Alliance Scotland, follow up young carers residential break with further research into issues around accessing respite and short breaks
- Secure sponsorship funding for 2009 residential event

2009-10

- Plan and deliver two Sharing Practice Network conference events
- Pilot and evaluate a visit for a group of planning & commissioning officers/respite coordinators to see innovative approaches being used in other parts of the UK which showcase personalised respite and short break services
- Continue to promote the online practitioner support forum, evaluate the benefits of this service and make changes as necessary
- Review and, if necessary, update research priorities
- With support from the SPN, commence research into different examples of strategic approaches to the development of short breaks and respite services
- Research and publish 2nd good practice guide (*provisionally on the topic of young carers and respite*)
- Support the piloting and evaluation of the Care Break Planning and Evaluation Tool in four local authority areas
- Plan and deliver a national 2-day residential event to provide a stimulating break for carers, whilst also providing an opportunity to be updated on national developments concerning respite and short break services.

2010-11

- Plan and deliver two Sharing Practice Network conference events
- Continue to promote the online practitioner support forum, evaluate the benefits of this service and make changes as necessary
- With support from the SPN, complete research and collation of different examples of strategic

approaches to the development of short breaks and respite services

- Publish 3rd good practice guide to support wider implementation of Care Break Planning and Evaluation Tool
- Develop and implement a training programme on person-centred planning to support implementation of Care Break Planning and Evaluation tool.
- Plan and deliver a 1-day national conference aimed at all stakeholders

Spending profile for this objective

- 30% of core costs: Yr1: £32,106, Yr2: £32,929, Yr 3: £33,752
- SPN event costs: provided through 'in kind' support from SPN member organisations. The core cost contribution reflects time spent in planning, delivering and writing up these events
- The platform for online practitioner support forum has already been developed. Ongoing costs minimal and a small amount of administrative support time has been allocated to core costs
- A maximum of £3,000 per annum will be allocated from Shared Care Scotland's unrestricted funds for the research and development of Good Practice Guides. Any additional costs will be met through sales of publications and/or other fundraising activities
- It is anticipated the development costs for the Care Break Planning and Evaluation Tool will be £20,000. Funds for this work will be sought from Changing Lives and/or grant making trusts
- Annual conference costs are between £3,500 and £4,500. These costs are fully recovered through charging delegates. A small surplus has been generated in the last 2-years and this has been allocated to unrestricted funds. The core cost contribution reflects time spent in planning, delivering and writing up these events.
- Training events for practitioners will be charged for and the level of charge will reflect time spent by Shared Care Scotland in planning and arranging the event.

Key outputs for this objective

- We will have delivered six SPN 'themed' conferences and produced reports from each event
- We will have identified research priorities related to planning and commissioning services to inform the development of good practice guides
- We will have collated case study examples of good practice in strategic approaches to short break planning and provision
- We will have facilitated joint comment on national policies for short breaks
- We will have developed an online practitioner support forum to encourage networking and sharing of experiences across areas
- We will have produced three good practice guides and a care break planning and evaluation tool
- We will have produced a research report identifying actions that would support improved access to respite and short breaks for young carers
- We will have delivered a training programme to support the implementation of the care break planning tool. Minimum of eight events planned between 2009-2011

- We will have delivered three national conferences attended by approximately 400 people

Monitoring arrangements for this objective

- Shared Care Scotland Board meets every two months and receives progress report on targets and milestones
- Business and Finance sub-committee meets every two months and monitors financial spend against income and maintains strategic overview of staff performance
- Terms of Reference of Sharing Practice Network are reviewed annually to ensure the network continues to provide intended benefits
- Stakeholder steering groups (with Board and external representatives) will be established to oversee research projects and development of practice guidelines, following model used on development of OSBIS

Organisational Objective 2

To strengthen the involvement of carers and service users in improving policy and practice at all levels

Targets for this objective

2008-09

- Plan and deliver two 'Have Your Say' consultation events to promote increased carer and service user involvement in the development of local respite strategies
- Recruit a Carer and Service User Consultative Group to act as 'critical friends' to Shared Care Scotland to advise on the development of services, responses to policy consultations, and to assist the Board in monitoring progress with our strategic plan
- Involve carers and service users in the development of the Care Break Planning and Evaluation tool – see *organisational objective 1*
- Undertake full review of members services resulting in a new strategy aimed at increasing and diversifying membership
- Draw up plans for the development and ongoing support of regional respite forums - ensuring through the terms of reference that these will integrate effectively with other relevant forums

2009-10

- In collaboration with COCIS, establish three regional carer and service user led respite forums
- Plan and deliver two 'Have Your Say' consultation events
- Involve and support carers and service users involved in piloting the Care Break Planning and Evaluation tool – see *objective 1*
- Continue to develop actions to implement membership strategy, monitoring impact and response to new services

2010-11

- Continue to provide support to the respite forums
- Analyse local strategies and improvement targets to test for evidence of improvements in the range, volume and quality of respite provision and greater carer and service user involvement; check against experiences of respite forums
- Involve carers in the development and implementation of a training programme on person-centred planning to support implementation of Care Break Planning and Evaluation tool – see *objective 1*
- Continue to develop actions to implement membership strategy, monitoring impact and response to new services

Spending profile for this objective

- 25% of core costs: Yr1: £26,755, Yr2: £27,441, Yr 3: £28,126
- The 'Have Your Say' carer and service user consultation events will cost £750-£1,000 per event. These costs have been included in the core cost figures including costs of planning, preparation and follow-up.
- The 'expense' costs for the respite forums are anticipated to be: Yr1: £4,000, Yr2: £4,120 and Yr3: £4,244. These costs have been included in our application to the Big Lottery. The cost of central administrative support has been included in our core costs.
- The costs of the Care Break Planning Tool are explained in objective 1
- The costs of supporting the consultative group are expected to be Yr1: £500, Yr2:513, Yr3: £526. These costs have been included in the core cost figures.

Key outputs for this objective

- We will have delivered six 'Have Your Say' consultation events with reports from each event
- We will have established three regional respite forums to monitor and provide feedback on the impact of national policy on the development of short break and respite services
- We will have developed a Care Break Planning and Evaluation Tool and training programme to support implementation
- We will have increased the numbers of Shared Care Scotland members – with a target of 100 new individual members and 25 organisation members by 2011

Monitoring arrangements for this objective

- Shared Care Scotland Board meets every two months and receives progress report on targets and milestones
- Business and Finance sub-committee meets every two months and monitors financial spend against income and maintains strategic overview of staff performance
- A stakeholder steering group (with Board and external representatives) will be established to oversee Care Break Planning Tool, following similar model to that used for OSBIS
- Shared Care Scotland and COCIS have established a reference group to monitor progress with joint working agreement comprising representatives from both organisations' governing committees
- Terms of Reference will be produced for the Respite Forums and records will be kept of meetings and attendance.

Organisational Objective 3

To provide accessible, up-to-date information and advice to those who use, provide or plan services

Targets for this objective

2008-09

- Launch and promote Shared Care Scotland's Online Short Break Information Service -OSBIS (*Separate outcomes table attached*)
- Secure funding to recruit a Communication and Information Manager to develop and implement a communication strategy and oversee promotion and ongoing development of OSBIS – *initially a 3-year post*
- Undertake a review of our existing information/advisory services leading to the development of a communication strategy to support Shared Care Scotland to achieve its vision and organisational objectives
- Publish and disseminate a DVD based information and advice resource explaining the benefits of short breaks with examples of breaks in different settings
- Publish and disseminate three editions of Breaking News
- Research, publish and disseminate new Shared Care Scotland services leaflet

2009-10

- Continue to promote and develop OSBIS and monitor impact on service users (*See separate outcomes table for detailed milestones*)
- Develop actions to support the implementation of the Communication Strategy – main target this year expected to be redesign of web site including the development of an interactive online forum where carers can exchange advice and information
- Secure funding for ongoing support and development of OSBIS beyond 2009
- Publish and disseminate three editions of Breaking News

2010-11

- Continue to promote OSBIS and monitor impact on service users (*See separate outcomes table for detailed milestones*)
- Continue to develop actions to support implementation of Communication Strategy – main target this year expected to be refresh of Breaking News and development of service specific e-bulletins (*we will seek funding for this through sponsorship and/or advertising*)

Spending profile for this objective

- 25% of core costs: Yr1: £26,755, Yr2: £27,441, Yr 3: £28,126
- OSBIS support costs including Communication and Information Manager post: Yr 1: £60,947, Yr2: £54,378, Yr3: £55,253 = Total: £170,578. £24,000 secured from Lloyds TSB Foundation Scotland, £146,578 applied for from Big Lottery
- DVD publishing costs = £1,500 (filming has taken place) and will be paid for through sales of DVD, therefore cost neutral
- Breaking News and service leaflet costs have been included in figures for core costs

Key outputs for this objective

- We will have developed a unique Online Short Break Information Service containing service information and advice covering all types of respite across areas, age groups and care needs
- From analysis of OSBIS database, we will have a clearer national picture of the range and volume of available respite services and areas of unmet need
- We will have produced and disseminated newsletters, e-bulletins and service leaflets
- We will have developed a DVD based training resource to support carers and service users in accessing short break and respite services
- We will have new sources of funding through grants, sponsorship and advertising

Monitoring arrangements for this objective

- Shared Care Scotland Board meets every two months and reviews progress against targets and milestones
- Business and Finance sub-committee meets every two months and monitors financial spend against income
- OSBIS steering group (with external representatives) will meet twice yearly to review impact of this service
- Telephone enquirers to our information service will be sent an evaluation form and OSBIS enquirers will be able to feedback online
- Reports will be produced for OSBIS funders, i.e. Scottish Government, Lloyds TSB Foundation and the Big Lottery (*assuming application is successful*)
- Members will be asked for their views on existing services as part of the Membership Review – see objective 3

Organisational Objective 4

To make and sustain connections at the local, regional and national levels

Targets for this objective

2008-09

- Maintain regular contact and involvement with the following key organisations and partnerships:
 - National and local carer organisations/networks
 - Scottish Government, Carers Policy, Changing Lives
 - Local authorities and health partnerships
 - Carers Research Partnership
- Continue to support the development of a national framework of respite and short break services for people affected by ASD
- Continue to develop actions to support the joint working arrangement with the Coalition of Carers in Scotland (*separate work plan attached*)
- Meet with SWIA and the Care Commission with a view to finding ways to support their contribution to the development of respite and short break provision. Identify a senior link person within each organisation
- Continue to maintain political awareness of issues around respite care through involvement with carers manifesto campaign, Scottish Parliament Cross Party Carers Committee and Respite Task Group

2009-10

- Continue to maintain regular contact and involvement with key organisations and partnerships
- Continue to support the development and implementation of a national framework of respite and short break services for people affected by ASD
- Continue to develop actions to support the joint working arrangement with the Coalition of Carers in Scotland.
- Continue to maintain political awareness of the issues around respite care through involvement with Scottish Parliament Cross Party Carers Committee and the use of focused media campaigns

2010-11

- Continue to maintain regular contact and involvement with key organisations and partnerships
- Continue to maintain political awareness of the issues around respite care through continued involvement with Scottish Parliament Cross Party Carers Committee
- Update Scotland's Carers Manifesto
- Review and evaluate joint working arrangement with the Coalition of Carers in Scotland and decide on future strategy

Spending profile for this objective

- 10% of core costs: Yr1: £10,702, Yr2: £10,976, Yr 3: £11,251

Key outputs for this objective

- We will have new joint working agreements/compacts with partners based on the model developed with COCIS
- We will have developed communications to support collaborative working producing better outcomes for carers and cared for people, and effective use of resources.
- We will have structured and purposeful relationships with partners providing 2-way communication between SCS stakeholders, regulatory organisations and the Scottish Government.

Monitoring arrangements for this objective

- Shared Care Scotland Board meets every two months and receives progress report on targets and milestones contained within annual work plan
- Business and Finance sub-committee meets every two months and monitors financial spend against income and maintains strategic overview of staff performance
- The proposed Carer and Service User Consultative Group and Respite Forums will assist the Board in reviewing the reach and impact of our work
- Have Your Say consultation events and the annual conference will also provide opportunities to gain feedback on our various initiatives and services

Organisational Objective 5

To demonstrate excellent governance, efficiency and effectiveness within Shared Care Scotland

Targets for this objective

2008-09

- Recruit and induct three new Board members with experience in one or more of the following areas: business and financial planning, black and minority ethnic issues and young carers issues, marketing and communication
- Conduct a review of Board performance using the *'How Good is Your Board'* toolkit
- Update role descriptions for Board members
- Develop an organisational structure which will increase our capacity to deliver our strategic activities but will be sustainable in terms of cost. In 2007/08 the objective is to secure Big Lottery funding to appoint a Communication and Information Manager with an additional 8 hours of administrative support
- Establish a more sustainable base for income growth which is less dependent on Scottish Executive funding. This will be achieved by including a 17% core cost recovery figure in all future bids for project related funding
- Develop more systematic methods of obtaining feedback from service users on the services received from Shared Care Scotland
- Review and update the Shared Care Scotland Staff Handbook
- Review and where necessary develop systems for improved monitoring and feedback on organisational performance

2009-10

- Recruit and induct two new Board members
- Continue to develop an organisational structure which will increase our capacity to deliver our strategic activities but will be sustainable in terms of cost. In 2009/10 the objective is to complete a cost benefit study on a new post of Learning and Development Manager
- Continue efforts to achieve a more sustainable mix of income
- Commence consultation on development of 2011-2014 Strategic Plan

2010-11

- Recruit and induct two new Board members
- Continue to develop an organisational structure which will increase our capacity to deliver our strategic activities but will be sustainable in terms of cost. In 2010/11 the objective is to secure 3-year funding to appoint a full-time Learning and Development Manager (subject to outcomes of cost benefit study)
- Continue efforts to achieve a more sustainable mix of income
- Publish 2011-2014 Strategic Plan

Spending profile for this objective

- 10% of core costs: Yr1: £10,702, Yr2: £10,976, Yr 3: £11,251
- The activities associated with objective 5 all relate to the effective governance and management of Shared Care Scotland and have therefore been allocated to core costs:

Key outputs for this objective

- A Board development plan will be produced to address gaps in skills, knowledge and experience. This will result in a strengthened Board
- Shared Care Scotland will have greater financial stability through an increase in the number of funding streams and this will enable us to enhance and extend the reach of our services
- Shared Care Scotland will have an organisational structure and systems designed to support the delivery our aims and objectives.

Monitoring arrangements for this objective

- The Board is responsible for monitoring the strategic development of Shared Care Scotland. The Board meets every two months and receives progress reports from the Chief Executive
- A Board development plan will be produced as an outcome of our review with targets and milestones. This will be monitored by the Business and Finance sub committee (*Chair, Vice Chair, Treasurer and Chief Executive*) which meets every two months between Board meetings
- The Chair and Vice Chair are responsible for monitoring the performance of the Chief Executive and performance appraisal meetings take place every six months for this purpose.
- The Chief Executive is responsible for monitoring the performance of staff and this is done through monthly one to one meetings and six monthly appraisals
- The proposed Carer and Service User Consultative Group and Respite Forums will assist the Board in reviewing the reach and impact of our work
- Have Your Say consultation events and the AGM will also provide opportunities for members to provide feedback on our various initiatives and services