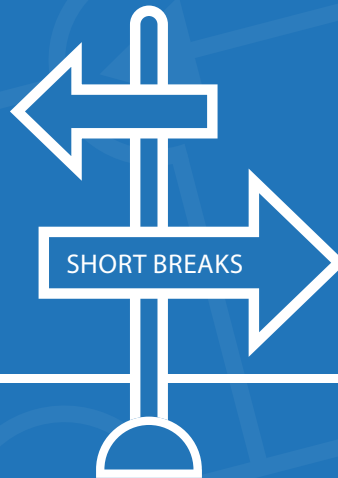
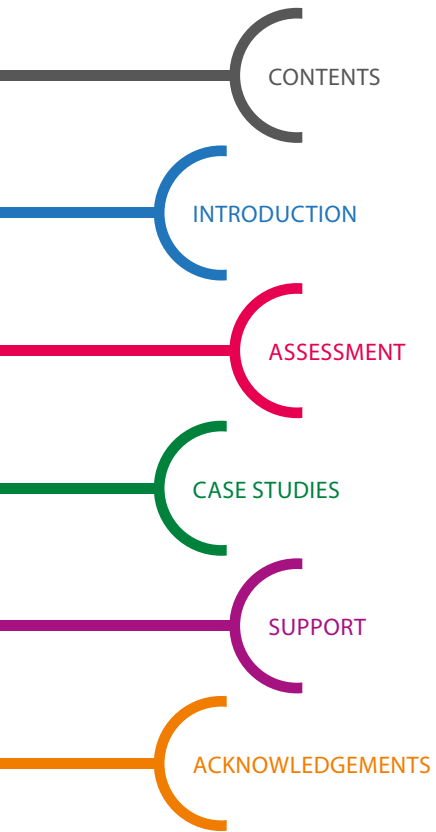


# SUSTAINABILITY: SHORT BREAKS FOR THE LONG TERM

A Step by Step Guide to Planning for Sustainability



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# INTRODUCTION

## SHORT BREAKS FUND - SUSTAINING SHORT BREAKS

Through the Short Breaks Fund, supported by Scottish Government, we have seen an increase in short break provision for carers and those they are caring for. As a funder, Shared Care Scotland wants to ensure that this level of activity continues beyond the life of the fund. For this to happen, organisations need to develop exit strategies and consider a range of sustainability options, particularly when the scale and speed of changes in the external environment are so great. In our view true sustainability involves more than just developing income streams or relying on grant funding. Sustainability is also about finding the most cost effective approach to delivering outcomes while maintaining integrity; it is about maximising resources, including relationships with all stakeholders. It can be about trying new ways of working.

### What is sustainability?

To some extent, sustainability is a myth. There is a common belief that once something has been funded it can be continued without further resources or input. In reality, nothing is self-sustaining. And nothing is sustainable without fresh inputs and new influences. We believe sustainability does exist, but it is a journey not a destination. And it absolutely does not mean staying the same. The purpose or aims of an organisation might not change, but services must evolve or they'll be left behind, meeting a need that no longer exists.

Finally, sustainability isn't just about organisations or their services. It can also be about impact. Rather than asking *'How can we sustain our service?'* we need to start asking *'Who does the service belong to?'*, *'How can we make a lasting difference?'* and *'How can we make it easy for people not to need us anymore?'*

### Where this Guide came from

The Short Breaks Sustainability Guide and supporting resources were developed through a year-long action learning project delivered in partnership between Shared Care Scotland and Wren and Greyhound Limited. Twenty one short breaks providers, funded through the Short Breaks Fund, came together to explore strategies for sustaining the differences they want to make. The process allowed them time to reflect on their practice, to recognise the most important aspects of their work and to consider the potential options for funding beyond the life of the Short Breaks Fund. Their openness to questioning their own purpose, focus and viability is what makes this Guide so valuable.

### How this fits with the existing Short Break toolkits

This resource was developed out of the same need and using the same process as the Consultation and Evaluation toolkits (more information and links to these toolkits can be found in the **Support** section). But unlike those, this guide doesn't provide ready-made tools for everyday situations. Instead, it is designed to help facilitate thought and conversation, which can lead to steps and action - along the road to sustainability. This guide won't make organisations and projects immune to forces outside their control, but it will help put sustainability into their own hands and ensure they are doing everything they can to make a lasting difference into the future.

supported by



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# INTRODUCTION

## SHORT BREAKS FUND - USING THIS GUIDE

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The guide has been designed in different sections to flow logically.

**01** Following this introduction there is a section called **Setting the Scene** which takes the form of a transcript of a conversation that took place during the final group session of Think Tank 1. By taking the time to read this dialogue it will open minds to what sustainability means to those working in the field of short breaks.

**02** Having attuned to the complexity of sustainability, the next section, **Assessing Sustainability**, introduces the three areas of sustainability and each of the five themes under each area. It also explains how to complete a sustainability assessment. Each area and theme is covered in turn. For each theme there is a title page with prompt questions which can be used as a springboard to help generate conversations to inform the completion of the assessment template for that theme.

**03** The impact of the assessment will only be felt if it leads to action. In the **Action Plan** section a template is provided to record outcomes, prioritise actions, assign responsibilities and review progress.

**04** Using the experience of some of the short break providers involved in the action learning programme, a number of case studies have been included in the **Case Study** section which describe their sustainability challenge, what they did, what difference it made and what they learned. The case studies are there to provide examples of how the sustainability process has influenced change.

**05** The last section **Support** provides details of what assistance Shared Care Scotland can provide to organisations to achieve their sustainability action plan.



# SETTING THE SCENE

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This is a note of a conversation that took place during the final group session of Think Tank 1 between:

**Alison Myles**  
Angus Carers Centre

**Angi Inch**  
Alzheimer Scotland

**Helen McAllister**  
Lanarkshire Carers Centre

**Janice Williams**  
The Haven

**Jo McPherson**  
Voluntary Action Shetland

**Kathryn Martin**  
Tagasa Uibhist

**Raymond Jamieson**  
Perth and Kinross Association of Voluntary Services

*The process was facilitated by*  
**Graeme Reekie**  
Wren and Greyhound

*with contributions from*  
**Alison Stevenson**  
Shared Care Scotland



# SETTING THE SCENE

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**Alison M:** Carers told us they didn't want time away from their family. What they never get is an opportunity to go out anywhere as a family. So our programme offered them weekly access to sports activity. We also hired out a hydrotherapy pool and soft play centre. Families had not considered that an option because they thought it was either too expensive, or didn't think it was for "people like them". Now they know it is for people like them, they can go ahead and use that under their own steam. It was just so overwhelmingly cherished by the families. You can't underestimate how important that kind of stuff is. One young woman, this was the first time she'd ever been out on her own without her child. The thing now is how to keep that going, and **part of sustainability is that we will try and get some of those parents to start planning the outings themselves.**

**Alison S:** Was that part of your thinking at the beginning or has that evolved through the work that you've done and how the project has developed?

**Alison M:** Over that first year we were able to learn what was important to people, seeing what they were doing themselves. All we are doing is facilitating people finding out about it and once those networks are strong enough we can go away and do something else. Or we can help them do the bits that they want to do, or help families that are more complex.

**Raymond:** I think you have come across something that's really productive and well-received. The challenge when you find something that works and it's in the hands of the gods how long you continue to deliver it for. There was an intention to cease two of the three day services in our localities due to transport costs. I was at a consultation to let people know that we weren't going to abandon them. In fairness, I think that we were starting the conversation assuming that this isn't going to be there much longer. However it became very clear, that the impact of closing one particular service would affect so many people. We came away from the consultation determined to find a way to make it work. **Sustainability means looking beyond just being pounds and pence**, there's other stuff well beyond that that you need to understand in order for services to continue to deliver. Listening to the carers, seeing what impact you can potentially make on their lives, trying to find a solution. As we go forward, it will involve integrated

working and partnership working.

**Alison S:** That's so interesting, because what you're saying is actually, with your business hat on, the business head said "we'll have to close this down, we can't make it sustainable", but actually by listening to carers and families you thought "this is more than just about money".

**Alison M:** We were feeding off the experts, which is the parents, learning from them about what they needed and responding to that. As long as you listen to the carers.

**Raymond:** What I've learned is to listen to service users, to take on board what they are saying in terms of the impact there's going to be on their lives. Then trying to find a way of making that service sustainable, liaising with the local authority and trying to get them to take ownership of some of the roles. In terms of sustainability going forward it's all going to be about delivering in partnership with the local authority.

**Helen:** For me sustainability is joint working with the local authority, NHS etc. There are loads of new things coming along, like respitality, which we've now got more people signed up for. A bingo company are maybe going to give us a game for four people and a meal every month. We joined up with them during Carers' Week. Folk are now definitely coming on board. For me it's about sustaining the whole project and the fact that we've now got past the first year, hopefully that will continue.

**Kathryn:** For me the way to sustainability is seeing what other groups are doing out there, it is important to have a link and a network. I started off with probably a pessimistic view of things. Having a business head on, would we have gone down this road with our Short Break service? No, probably not. But then when we did our stakeholders' survey, when we looked into it, people wanted it, people needed it, people recognised that they would use it, and that was the big leap, the big risk that we took in terms of developing it as a respite care home.



# SETTING THE SCENE

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**Alison S:** It's fascinating that the two of you looked at the financial side of things and decided that wasn't the most important part of it.

**Kathryn:** It's the whole bigger picture of it, not just the money side of it. Involving everybody around you and involving the community around you. Looking into partnership working as well, with other organisations. It's been a long process with the local authority, but I think now that they are on board with it they can look at us as a proper partnership now, there is a formal agreement there that's structured and it's helped a great deal. We used the *Shared Care Scotland unit cost toolkit* to work out our costs and from there they could see that there was no leeway for us.

**Alison S:** So you could actually show them, these are the costs and this is how we got there?

**Kathryn:** Yes, and I put that into the tender. It's a fantastic tool to use in terms of showing exactly where your figures come from.

**Angi:** With tenders you sometimes think, we can't provide the service for that cost, why are we doing that, why are we putting ourselves in that situation? It's brilliant to see that you just stood your ground and said no. And having a tool that supported you, that's the other thing they're all asking about, for actual costs, they don't want estimates. So this tool is just epic!

**Kathryn:** We have to look at it that way and market things better. How to project your service, let people know what you're doing, spread the word more. The points I have learned are to look at the whole picture and that funding isn't the be-all and end-all. We have to look at other ways of going forward and including everybody around us.

**Angi:** Word of mouth is how our fund works best, we've learnt that and we accept that now. If people ask me for posters, I say no, I'll tell you who your local contact is, go and speak to them. Getting that assertiveness has been really helpful. It is our national identity that is our strength.

**Alison S:** I also think that you are at the stage where you've got enough confidence to start challenging the way you've done things in the past and not think "we always have to do it this way". You've got more self-confidence, you can ask yourselves questions about what is the best way forward, can we do this and can we do that? And that's good.

**Angi:** My big discussion now is getting the organisation to carry that on, saying look at how well this has worked. I'm very inexpensive, I'm very cost-effective, which is a great way of getting stuff out there. What do we want to take forward as an organisation, how can I sell this to my organisation, how can I move it forward? I can see now how that's going to work, having been part of this whole process.

**Jo:** In consultation with older carers, a lot of people were feeding back that they don't come to a group because they don't have any care cover. **So we decided that we needed to look at things differently.** We got a dialogue going with everybody as to what they wanted from the group and how we thought it could work. Then we thought, do we need to do this on our own? We're now going to do it with three of us in a partnership. RVS are going to do the lunch and social element. We're going to do the carer support and Befriending will come in with the carers until they have established a group friendship. It's been quite a challenge to put the bid together, because there's all of us in it, but I think it's more sustainable because of that. Also I feel it's really good for the people coming to the club, because they will get far more out of it, there's far more interactions going to happen.

**Alison S:** I appreciated the focus on consultation, how much hard work you put into consulting with your carers.

**Jo:** I feel what's the point in developing a service if you've not actually spoken to the people you're developing the service for? And I've got volunteers coming out from doing that consultation now to help with the service as well, so it pays back in lots of ways.



# SETTING THE SCENE

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**Janice:** A lot of sustainability thinking went in to all our services. **We had to step back and do a strategic review to see which of the services are core.** We had to operate under very strict budget limits and had to make some tough decisions. It was quite a difficult time for people. Going from a culture of “We’ll find the money and we will just do it”, to then having to say, “Well, we can’t actually do everything and we’re going to have to stop and be very careful now”. That’s short-term pain for a long-term gain. Looking to the future it’s very positive. It’s going to be a lot about relationships and collaborations - how do we work together, what is distinctive about us, what are the gaps that need to be filled? I think we will need to keep that breadth of thinking and be willing to keep changing

**Alison S:** Finding your niche, your unique selling point amongst those other things, and finding how you can harmonise with them and not duplicate is going to be critical going forward for you and for them too.

**Janice:** The focus on signposting and linking up and facilitating people getting to those things becomes much stronger for my staff and for the way that we work. That’s a wee bit of a mind-change for them in it’s not us that has to do everything.

**Alison M:** As long as people are still getting the services then we’ve all done our job.

**Angi:** I have seen so many carers be hurt because services have been precious. There were opportunities open to carers but services wouldn’t talk to them about it because they only provide their bit. Your openness to say what else is out there has been refreshing.

**Raymond:** You said you’re not taking any more referrals and that got me thinking, I wonder how that would be received in other services, to say “We’ve no capacity for new referrals”?

**Janice:** It was something that had to happen and it was the right decision. I think we’ve come out stronger in the end from it. We’ve certainly managed to maintain our support for all our existing clients and carers, we just closed the doors and said we can’t take any new referrals, and that was something that we’d never done before.

**Kathryn:** You can’t give a quality service when you’re stretched to the limit.

**Alison M:** **It’s easy to underestimate how a short breaks service is going to require you to think differently as an organisation** and the impact it’s going to make with other parts of the organisation. This process has taken us along a whole family approach. Our young carers’ workers and adult carers’ workers are supporting the same family now. I think it’s given us as a team a much more cohesive feeling of developing the service together.

**Graeme:** Summing up, what have you got out of the Think Tank process as a whole?

**Alison M:** I go away with more of what we’ve got in common. We all support carers in very different ways, but the impact on the person’s life, that’s the thread that runs through it.

**Janice:** **The Think Tank helped provide a kind of framework and a much more focussed approach to how we addressed all those sustainability challenges.** A lot of the things that people have shared here have reminded me and encouraged me to keep thinking laterally.

**Kathryn:** It’s been really, really useful for me seeing what everyone else is doing all over the country.

**Angi:** I can’t thank you all enough for what you’ve given me. It’s just been such a great experience, it’s such a supportive atmosphere. And you were willing to realise that there are challenges out there, but the challenges just sometimes need that wee bit of tweaking to overcome!



# ASSESSING SUSTAINABILITY



# ASSESSING SUSTAINABILITY

## THE AREAS AND THEMES OF SUSTAINABILITY

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### SUSTAINABLE *ORGANISATIONS*

Organisational competence and resilience are a big part of sustainability - organisations need cool heads in testing times. But they also need hearts – the energy, enthusiasm, creativity and responsiveness to take on new opportunities. Sustainability isn't just about managing risk, but proactively developing and improving our organisations.

### SUSTAINABLE SHORT BREAK *SERVICES*

Sustainable services know what they are all about. They are efficient and focused, with a clear understanding of the difference they want to make – and the resources available for doing that well. They are flexible and responsive, but they do not take on more work than they can manage.

### SUSTAINABLE SHORT BREAK *IMPACT*

Sustainability is not the same as keeping services running. Sometimes projects end. But the impact can be sustained if people are involved and empowered, and if stakeholders and mainstream services buy into the outcomes that have been achieved. Sustainable services ask themselves 'Who does our service belong to?'

#### SUSTAINABLE *ORGANISATIONS*

1. Income and finance
2. Culture and values
3. Governance
4. Policy
5. Leadership and management

#### SUSTAINABLE SHORT BREAK *SERVICES*

1. Funding, costs and efficiency
2. Evidencing and meeting need
3. Promotion and marketing
4. Quality and innovation
5. Capacity and staffing

#### SUSTAINABLE SHORT BREAK *IMPACT*

1. Outcomes and evaluation
2. Independence and empowerment
3. Involvement and participation
4. Stakeholder support
5. Improvements to mainstream practice and policy

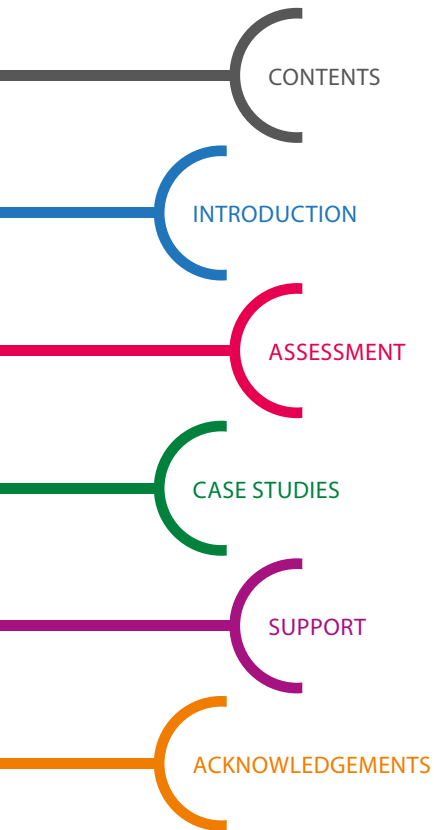


# ASSESSING SUSTAINABILITY

## HOW TO COMPLETE THE SUSTAINABILITY ASSESSMENT

The following sections look at each sustainability area and associated themes. For each theme there is an assessment template with indicators relating to the theme. The indicators are designed to encourage reflection and to help focus and facilitate conversations. So choose the sections that seem most relevant. It's not a form-filling exercise! There is also space for adding in additional indicators to each theme if desired.

Each section doesn't need to be completed, or be done in one go – use the themes' headings to decide where to focus attention. Here are some suggestions on how to approach the assessment depending on the time and opportunities available.



01

### One hour of staff development time

should be enough to read and reflect on two or three themes (e.g. 'income and finance' from the Sustainable Organisations heading; 'outcomes and evaluation' from the Sustainable Impact heading).

02

### A two-hour sustainability session with a colleague

should allow time to talk through and start evidencing four or five themes, or a whole sustainability heading (e.g. 'Sustainable short break services').

03

### A sustainability session during a board or team meeting

will probably just be enough to discuss one or two themes in any detail (e.g. 'Governance' from the Sustainable Organisations heading).

04

### A sustainability away day

can be designed to cover all of the most important themes. See our separate **support** section for more information.



# **SUSTAINABLE**

## ***ORGANISATIONS***





How do you differentiate yourselves in the market?

If different funders have different requirements how can you bring those requirements together to get a clear vision?

How can you use your evidence of value for money and cost/benefit?

Who can help sell your organisation?

Is there any part of the business that the Local Authority would be more likely to pay for?

How can you have dialogues with funders? Do you have to wait to be asked?

Who is involved in deciding on, writing or changing funding applications?

What's your funding mix? What does that tell you? What balance do you want/need in future?

Would you change the project if it wasn't for having to make new funding applications?

Does funding follow projects, or do projects follow funding?

How can other organisations contribute in non-financial ways?

Do people who use the service pay for it?

If they get the currently service for nothing, why would the Local Authority (etc.) want to start paying for it?

Do you know the breaking point when funding delays becomes critical?

Sustainable Organisations

# INCOME AND FINANCE

During the process of creating this resource, short break organisations explored sustainability by sharing their own challenges.

The questions they came up with are shared here as a springboard for discussion and debate.



Sustainable Organisations

# INCOME AND FINANCE

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	Evidence	Score 0 = not met 1 = partially met 2 = fully met	Reflections? Actions? NB think about whether it is more effective to build on identified strengths or to address perceived weaknesses.
1. We have an effective income generation strategy.			
2. We have a good track record of generating revenue from multiple income streams.			
3. We have a reserves policy and a clear strategy for the circumstances in which we would use reserves to fill a funding gap or invest in development.			
4. We understand and implement Full Cost Recovery. We have a clear system for assigning overhead costs to projects.			
5. We manage and report on finances competently, including cashflow. We provide management accounts in advance of every board meeting.			
6. We review our costs regularly. We have established the unit costs of every element of our services.			
7. We identify the proportion of each post or project that is made up of different funds, and monitor when these are due to run out.			
8. Projects cover their costs and we identify and actively address financially failing projects.			
Own questions/indicators			



Is there a shared/agreed definition of the ethos and culture?

What's the culture in your organisation?  
Do you want culture change?

What are your core strengths? How clear are you on what they are?

When did you last review the service?

What role do values play in recruitment?

What is it you want to hold on to? What can you let go of?

What do you want to do going forward?  
Why do you want to do this?

How clear are you on what needs to remain?

Would you like there to be a clearer vision?

Sustainable Organisations

## CULTURE AND VALUES



During the process of creating this resource, short break organisations explored sustainability by sharing their own challenges.

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Sustainable Organisations

# CULTURE AND VALUES

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	Evidence	Score 0 = not met 1 = partially met 2 = fully met	Reflections? Actions? NB think about whether it is more effective to build on identified strengths or to address perceived weaknesses.
1.	We have a clear sense of our history, where we have come from and what is important, without being rigid.		
2.	Our values have been decided and embraced by everyone in the organisation.		
3.	Our values are embodied in everyday practice, e.g. in staff recruitment and appraisal.		
4.	There is ongoing reflection and learning at all levels in the organisation.		
5.	Our organisational culture celebrates a questioning approach. We are open to feedback and challenge.		
6.	People are highly committed to the organisation, its culture and ethos.		
7.	We regularly celebrate success and achievement.		
8.	The organisation defines success on the basis of the development of our people and the people we serve.		
	Own questions/indicators		







What is your goal, your objective?

Have the board reviewed the mission and direction to ensure they are still relevant?

What's the right balance between recruiting new trustees and developing existing ones?

Whose job is it to decide what's best for the organisation?

Do your trustees and managers know what they expect from each other?

How well do you balance the operational and developmental?

How can you develop the organisation's structure to be more sustainable?

How do you work with your board to get each other's voices heard?

What plans do you have to try and expand or replicate the service?

Has the board got a good skillset?

Have you shared your vision for development with the Board?

Sustainable Organisations

# GOVERNANCE

During the process of creating this resource, short break organisations explored sustainability by sharing their own challenges.

The questions they came up with are shared here as a springboard for discussion and debate.



Sustainable Organisations

# GOVERNANCE

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	Evidence	Score 0 = not met 1 = partially met 2 = fully met	Reflections? Actions? NB think about whether it is more effective to build on identified strengths or to address perceived weaknesses.
1. We have a clear strategy for the future, beyond current funding cycles. The strategy sets parameters but encourages flexibility and responsiveness within these.			
2. Trustees and staff are clear on their respective responsibilities. Board meetings are spent on appropriate business, including Board-only time.			
3. Our Board routinely audits its performance and make-up.			
4. We undertake an organisational risk assessment annually.			
5. We fulfil our regulatory and legal requirements, e.g. prompt and accurate annual returns to OSCR, Companies House.			
6. We hold all relevant insurances which are reviewed regularly. Our trustees are protected from personal loss through incorporation.			
7. We have transparent complaints and incident reporting procedures, scrutinised by our Board.			
8. Our partners and funders know us to be credible, principled and effective.			
Own questions/indicators			



Do you have links to National Carers Organisations?

What is your role in different Strategies?  
Does your organisation help to shape local carer strategy?

Who takes responsibility for policy engagement in your organisation?

Do your partners know how your work contributes to their strategies?

Can you show your role in helping NHS/LA meet their goals/strategies and toughen that?

Are you a member of any organisations or networks that provide policy digests?

How do you keep abreast of changes taking place in the external environment?

Sustainable Organisations

## POLICY



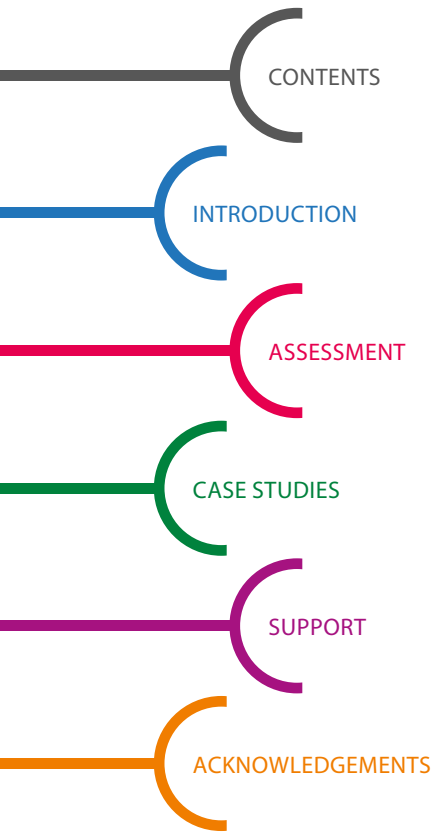
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Sustainable Organisations

# POLICY



	Evidence	Score 0 = not met 1 = partially met 2 = fully met	Reflections? Actions? NB think about whether it is more effective to build on identified strengths or to address perceived weaknesses.
1. We identify which national and local strategies we contribute to.			
2. Commissioners and policy makers know how we contribute to their strategies.			
3. We are proactive in developing local carers' policy, not just waiting for others to take the lead.			
4. We use our evaluation, evidence and reports to influence national and local policies and practices.			
5. We publish and disseminate a clear and engaging annual report.			
6. We participate in relevant local and national fora to learn about and influence policy.			
7. We are knowledgeable about our sector and well connected within it. We are seen as a source of knowledge which others draw on.			
8. We actively scan the external and policy environment to identify developments in our field.			
Own questions/indicators			





What will happen if things don't change?

Do you think this is a problem of managing change?

Are there parts of your role you'd like to dedicate more (or less) time to?

Sustainable Organisations  
**LEADERSHIP AND MANAGEMENT**

Do you have a stakeholder and carer engagement plan?

Do you know what you'd like long term and short term?

Have you reviewed against a similar organisation?

How can you allow yourself time to think creatively?

Have you got the power to manage the situation?

Do YOU need to do it, or does it need to be DONE?

What would it be like for you to give up some control?

What are you assuming a leader should be like? How do those assumptions hold you back?

What are you holding on to, maybe personally? Can you let go of something?

Do staff have clear support, direction and structure in place?

For the staff, is it better if managers are at a distance or closer to projects?

Do you have a structure for support and supervision?

How can you inspire staff's confidence in you/your view of the situation?

How do you know what colleagues think about your approach?

Do staff know the boundaries and responsibilities before they need to seek approval?

During the process of creating this resource, short break organisations explored sustainability by sharing their own challenges.

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Sustainable Organisations

# LEADERSHIP AND MANAGEMENT

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	Evidence	Score 0 = not met 1 = partially met 2 = fully met	Reflections? Actions? NB think about whether it is more effective to build on identified strengths or to address perceived weaknesses.
1. Everyone involved in the organisation has a shared vision for its future.			
2. We have the right people in the right roles in critical parts of the organisation			
3. Our Board is well-established and diverse, with the right mix of skills and experience.			
4. Trustees understand the organisation and its work.			
5. Trustees and staff have opportunities to meet and learn from each other's perspectives.			
6. Staff, trustee and volunteer development is well resourced and supported.			
7. Everyone knows their roles in ensuring effective communication. Information is shared effectively between staff, management and trustees.			
8. Our staffing structure is appropriate, and periodically reviewed.			
Own questions/indicators			



# **SUSTAINABLE**

## **SHORT BREAK *SERVICES***





What value do you place on outcomes?

How do you support those who require long-term interventions when the funding of services is always short-term?

How much time and energy have you spent on this situation?

Is less maybe more just now?

With limited resources, how much 'reach' is enough?

Have you used the Short Break Fund Unit Cost Toolkit?

If you weren't providing the service, who would?

How do you balance crisis interventions with preventative support?

What is your niche and how are you best placed to fill it?

Is doing the same thing week in and week out good enough?

If core funding is a challenge, when do you start saying no to more referrals, or making cuts? Or what will it take for you to become more comfortable with that option?

Is there a problem with being all things to all people?

Is it about doing more, or doing things differently?

What is the capacity/saturation point, and how will you know when you have reached it?

How do you provide service to everyone who needs it?

Are you delivering what you want to deliver?

Should you consider stopping the service?

Do you have the right balance between development and delivery?

Sustainable Services  
**FUNDING, COSTS AND EFFICIENCY**

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Sustainable Services

# FUNDING, COSTS AND EFFICIENCY

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	Evidence	Score 0 = not met 1 = partially met 2 = fully met	Reflections? Actions? NB think about whether it is more effective to build on identified strengths or to address perceived weaknesses.
1. Funding for the short break service is not just 'bolted on' – it fits the organisation's objectives.			
2. Project funding builds on what we have learned from previous projects: we're not led by funding.			
3. Project funding covers costs and contributes to organisational overheads.			
4. We review the cost-effectiveness of our services.			
5. We can evidence that our services are good value for money.			
6. Everything we do is necessary – if something doesn't contribute to outcomes, we don't do it.			
7. We use our resources to the fullest. Premises and partnerships are used as well and fully as possible.			
8. People with individual budgets can purchase short break services. Our systems and staff support this effectively.			
Own questions/indicators			



Who owns the need?

When you talk about what 'the community' wants, which community do you mean, when?

How representative is your evidence of need?

How up to date is your understanding of what people want from your service?

Can you use current services to identify new or unmet needs?

Is there a shared recognition of the need?

How often do you spend time formally assessing the level and nature of need?

How do you prioritise what services you provide and who receives those services?

How well do you understand the levels of demand or need for your service?

Sustainable Services

## EVIDENCING AND MEETING NEED



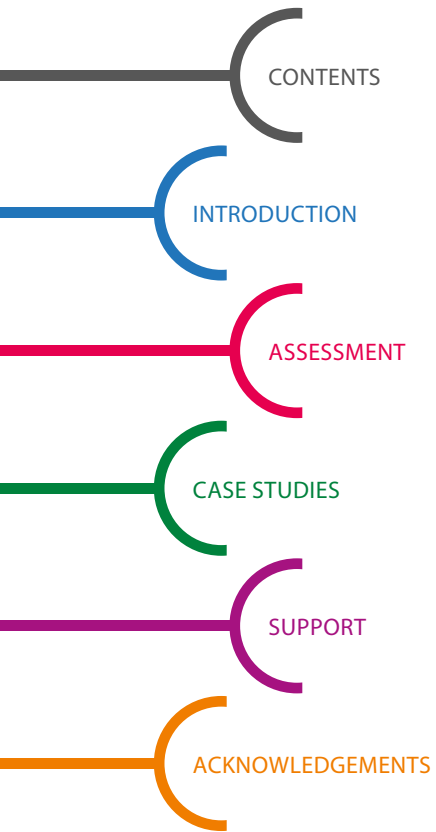
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Sustainable Services

# EVIDENCING AND MEETING NEED



	Evidence	Score 0 = not met 1 = partially met 2 = fully met	Reflections? Actions? NB think about whether it is more effective to build on identified strengths or to address perceived weaknesses.
1. We have current, credible evidence of what people need.			
2. We design our services based on what carers and cared-for people tell us they want – and want to achieve.			
3. We change our services in response to changing needs.			
4. We provide a variety of Short Break services and options (e.g. about type and duration of break).			
5. We gather evidence of need before applying for more funding.			
6. We identify and respond to unmet need (e.g. via partnership work, developing new projects).			
7. We accept we can't meet everyone's needs and work appropriately to manage that (e.g. highlighting unmet need, referring to others).			
8. We consult with people who use our service - and try to reach those who don't.			
Own questions/indicators			





Do you publicise your success e.g. using media?

How do you get the project to become embedded in the core work of the organisation?

Are you getting support from within your organisation?

What are your sources of influence?

Are you talking enough about what you do?

Do you have policies for social media?

What are your bargaining points?

Who are your supporters? Who are your allies?

What are the links you could use to promote your work?

Is there a need for a better plan/communications strategy?

How can you find out if how you are perceived matches your own self-perception?

If your service disappeared tomorrow, what would that mean? Who would feel it? Who needs to feel it?

Have you assumed that people know what you do?

How do you effectively share good practice?

Sustainable Services  
**PROMOTION AND MARKETING**

Can carers blow their own trumpet or your trumpet for you? How do you encourage this?

What is the offer? How well defined is it? Is there a project plan for it?

How are you being sold? Who can talk well about you?

Have you got a trusted partner at the moment?

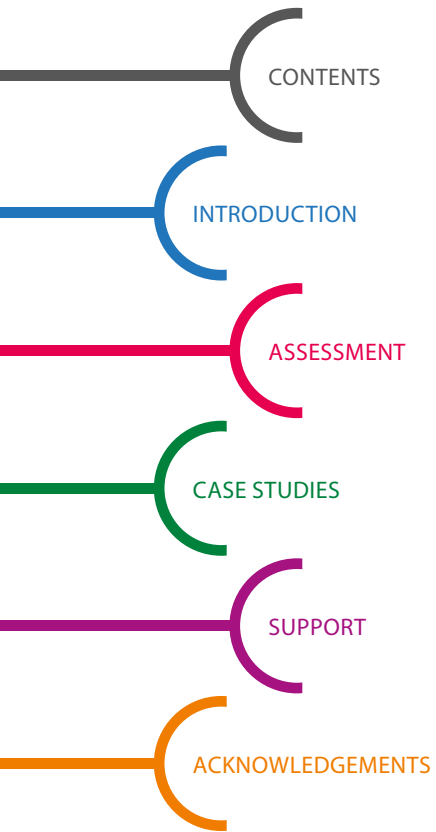
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Sustainable Services

# PROMOTION AND MARKETING



	Evidence	Score 0 = not met 1 = partially met 2 = fully met	Reflections? Actions? NB think about whether it is more effective to build on identified strengths or to address perceived weaknesses.
1. We promote the Short Break project, within the organisation and beyond.			
2. We communicate using a range of media and review their effectiveness.			
3. We use real life stories to highlight the difference we make to people.			
4. We have identified our existing and potential markets, including people with individual budgets, families, referrers and other influencers.			
5. We have identified and use clear messages for marketing our work.			
6. We have identified champions (e.g. participants, volunteers, partners) who can join us in advocating or campaigning.			
7. Stakeholders (e.g. funders, partners, communities) recognise the benefits of our Short Break service.			
8. People and families understand the way we work and feel safe spending time away with our projects.			
Own questions/indicators			



Sustainable Services

## QUALITY AND INNOVATION

During the process of creating this resource, short break organisations explored sustainability by sharing their own challenges.

The questions they came up with are shared here as a springboard for discussion and debate.

Do incremental improvements count as innovation?

What can you learn from previous attempts at innovation?

How much are you prepared to sacrifice for quality?

Is there anyone who could help you balance quality and quantity?

How do you measure quality?

How does your organisation perceive innovation? Has it unpicked what innovation means?

What's the right balance between innovation and continuity?



Sustainable Services

# QUALITY AND INNOVATION

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	Evidence	Score 0 = not met 1 = partially met 2 = fully met	Reflections? Actions? NB think about whether it is more effective to build on identified strengths or to address perceived weaknesses.
1. We routinely and systematically measure the quality of our services.			
2. We use external standards or feedback to maintain the quality of our services (e.g. Care Inspections, Investing in Volunteers, Carer Quality Of Life (CQoL)).			
3. We know when quality is being compromised (e.g. by demand, funding, staffing etc.) and take action accordingly.			
4. Our strategies and systems encourage development and innovation.			
5. Our services develop and pilot new ways of working.			
6. Staff contribute ideas for innovation and improvement – and are listened to.			
7. Innovations from one service are shared across the organisation.			
8. We work with other organisations to innovate new approaches to common challenges.			
Own questions/indicators			





Is there a training need? Who for?

How do you make a volunteering role appealing for an individual? What sort of person would it be attracted to it?

How do volunteers relate to the work provided by paid staff?

Are staff up to speed with Self-Directed Support in relation to Short Breaks?

Are you addressing development needs as much as you'd like?

What resources, including volunteers, do you have available?

Is there an historical reason for the current model of recruiting staff? Is it still relevant?

Do you harness the goodwill, energy, motivation and skills that your staff and volunteers bring?

Where do the team themselves think they are in terms of capability?

Can you reach new volunteers via existing ones?

Do you have members of staff who ooze the qualities you are looking for in new staff?

Do you have external people (e.g. families?) involved in recruitment?

Is your volunteering doing a service for the volunteers?

What are the skill gaps you've got at the moment?

How high are your expectations of staff and colleagues?

Sustainable Services

## CAPACITY AND STAFFING

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Sustainable Services

# CAPACITY AND STAFFING

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	Evidence	Score 0 = not met 1 = partially met 2 = fully met	Reflections? Actions? NB think about whether it is more effective to build on identified strengths or to address perceived weaknesses.
1.	Our staff and volunteers are experienced and knowledgeable, with the skills they need to do their jobs well.		
2.	Staff understand sustainability and their role in supporting it.		
3.	All staff and volunteers have clear support, direction and boundaries in place.		
4.	Staff and volunteers have opportunities to develop within – and beyond – their current roles.		
5.	Staff and volunteer commitment is high – and turnover is low.		
6.	We have systems for prioritising work. We don't take on more than we have capacity to deliver.		
7.	Staff are working within capacity and are supported to recognise when this is stretched to unhealthy or unsustainable levels.		
8.	When we cannot meet demand for our services we find alternatives, for example reviewing referral arrangements, or referring to other organisations.		
	Own questions/indicators		



# SUSTAINABLE

## SHORT BREAK *IMPACT*





Sustainable Impact  
**OUTCOMES AND EVALUATION**

What are you trying to learn?

Are your partners ready to receive your evidence? Do you know how they like their evidence?

Can you incorporate evaluation as part of your activities?

Who needs evidence of the impact of your work?

What would it take for you to move from 'We think...' to 'We know'?

Do you need evaluation training or support?

What evidence is there that your model works?

What information do you need for evidencing impact?

How do you currently evidence impact?

Have you established a baseline to measure/report against?

Have you used the Short Break Fund Easy Evaluation Toolkit?

Have you got strong feedback and evidence?

Do you have an evaluation system in place?

What are you trying to prove with evaluation?

Do you review your evaluation system to ensure it is 'fit for purpose'?

How will you use and share the results, e.g. 'You said, we did...?'

Do we understand the difference between outcomes and activities?

How confident are you in the benefit of your service? What would happen if you didn't provide it?

What's the difference you want to see?

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Sustainable Impact

# OUTCOMES AND EVALUATION

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	Evidence	Score 0 = not met 1 = partially met 2 = fully met	Reflections? Actions? NB think about whether it is more effective to build on identified strengths or to address perceived weaknesses.
1. The Short Break service has clear outcomes, identifying the difference it makes.			
2. We plan on the basis of what is needed for outcomes, not 'the service'.			
3. We routinely and systematically measure outcomes.			
4. We use a range of appropriate and accessible evaluation tools in our everyday work.			
5. Evaluation helps us to learn and improve.			
6. Evaluation helps people to reflect on their progress and plan their next steps.			
7. We analyse the information we gather and change the way we do things in response.			
8. We communicate evaluation results, sharing learning with staff, volunteers, carers, trustees, partners and funders.			
Own questions/indicators			



Do people return to your service as volunteers or employees?

How is your service equipping people to become more independent?

Are you trying to sustain your service – or its impact?

Does your service encourage peer support networks to be established?

How do you make it easy for people not to need your service anymore?

Do you have a role in introducing people to other services?

Sustainable Impact

## INDEPENDENCE AND EMPOWERMENT



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Sustainable Impact

# INDEPENDENCE AND EMPOWERMENT

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	Evidence	Score 0 = not met 1 = partially met 2 = fully met	Reflections? Actions? NB think about whether it is more effective to build on identified strengths or to address perceived weaknesses.
1. Our services increase people's capacity and resilience.			
2. Carers and cared-for people understand their rights. They know where to go for information, support or advice.			
3. People build informal support networks through our work, e.g. meeting independently of our service.			
4. We support people to develop self-management and self-advocacy skills.			
5. Carers and cared-for people take ownership of their development.			
6. People have the confidence to find their own pathway in life, e.g. in their own community, education, training etc.			
7. People move on from our service when they no longer need us. We have an open door – not a revolving door.			
8. People start accessing other services or breaks independently.			
Own questions/indicators			





Sustainable Impact  
**INVOLVEMENT AND PARTICIPATION**

Does the voice of a few carers paint a true picture of the needs and issues of all carers?

How can IT / technology be used to involve carers?

How broad is the spectrum of different ways that carers can be involved?

Can you adapt to target other areas of the community?

When is it appropriate to involve carer and volunteers?

When consulting, how many voices need to be heard to make it valid?

Is your model of involvement the most appropriate?

How do you ensure that carers can be heard without making their voice tokenistic?

How can you have more dynamic carer involvement?

Have you asked why you are involving carers? Why do you want it, and why would they?

Have you used the Short Break Fund Consultation Toolkit?

Who are you reaching, and why? Are there other pockets of society you're not reaching?

Can you accommodate the different ways people might want to be involved?

How do you link carer involvement into staff and the work of the organisation?

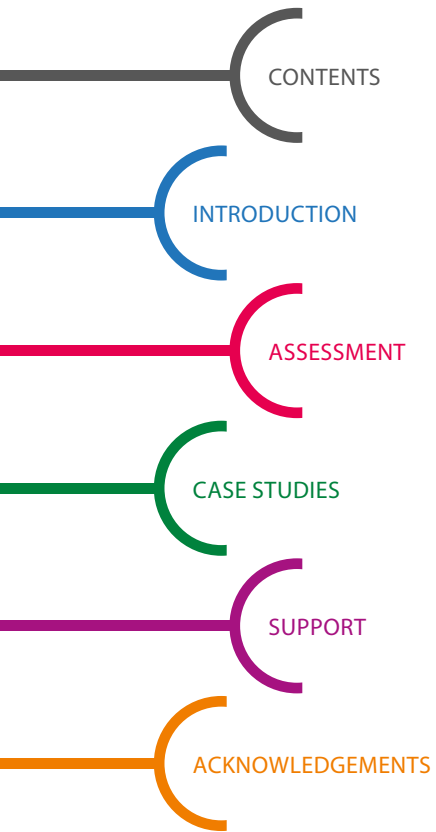
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Sustainable Impact

# INVOLVEMENT AND PARTICIPATION



	Evidence	Score 0 = not met 1 = partially met 2 = fully met	Reflections? Actions? NB think about whether it is more effective to build on identified strengths or to address perceived weaknesses.
1. We are clear on why we involve carers – and what we each get out of that involvement.			
2. Carers and/or cared-for people are genuine partners, working with us to create what they need.			
3. Carers and/or cared-for people are part of decision making processes – their own and ours.			
4. We have a good range of ways and levels for people to be involved e.g. volunteering, consultations, working group, focus groups.			
5. We involve an appropriate range and diversity of people, not just 'the usual suspects'.			
6. Community voices are heard in planning, evaluating and funding our project.			
7. We involve people in exploring different ways to run or sustain the service.			
8. We make use of informal feedback (like thank you cards and anecdotal comments).			
Own questions/indicators			







Are there partner organisations to share the load?

What buy-in is there from the statutory sector?

If you don't know your own goals, how can you identify shared goals with partners?

How could your organisation add value to other people's?

How do you feel about using people's goodwill?

Who are your key referrers? What does this tell you?

What do you give partners?

Are you clear about where the power sits? Where would you like it to sit?

Are other organisations having the same experience?

What can you learn from how previous partnerships came about?

Sustainable Impact  
**STAKEHOLDER SUPPORT**

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Sustainable Impact

# STAKEHOLDER SUPPORT

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	Evidence	Score 0 = not met 1 = partially met 2 = fully met	Reflections? Actions? NB think about whether it is more effective to build on identified strengths or to address perceived weaknesses.
1. We know who our key stakeholders are.			
2. We know what our stakeholders need from us – and what we need from them.			
3. Our community supports us and shows this e.g. through donations, volunteering and referrals.			
4. We have good relationships with our funders and commissioners.			
5. We have effective referral routes, with a number of sources not just a few key individuals.			
6. Our organisation's systems tie in with other organisations where appropriate, e.g. referral processes, organisational planning, care planning, reporting cycles.			
7. Our partners say we are good to work with.			
8. We share good ideas and best practices with other agencies.			
Own questions/indicators			



Do you have a role in educating other services about the people you work with?

If it's not your job to educate other services, whose is it?

How do you share your expertise with other organisations?

Do you take active steps to change attitudes, or does it happen by osmosis?

How do you share learning about what works?

Which parts of your service could or should be delivered by 'mainstream' services?

Sustainable Impact

## IMPROVEMENTS TO MAINSTREAM PRACTICE AND POLICY



During the process of creating this resource, short break organisations explored sustainability by sharing their own challenges.

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Sustainable Impact

# IMPROVEMENTS TO MAINSTREAM PRACTICE AND POLICY

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	Evidence	Score 0 = not met 1 = partially met 2 = fully met	Reflections? Actions? NB think about whether it is more effective to build on identified strengths or to address perceived weaknesses.
1. As a result of our work there is a wider range of options available to children and families locally.			
2. Mainstream staff are more aware of and skilled at working with our client groups.			
3. Mainstream services have enhanced their facilities and services to enable people to access them.			
4. People we work with (e.g. children with disabilities) feel valued when using other services.			
5. We have appropriate and well-maintained links with statutory services.			
6. We contribute to local or national events to share and influence practice (conferences, seminars etc.).			
7. We publicise our successes and share good practice.			
8. We know how to influence decisions and practice, and are clear on our sources of influence.			
Own questions/indicators			



# ACTION PLAN



# ACTION PLAN

## ACTION PLAN TEMPLATE GUIDELINES

Assessing sustainability will be useful, but it won't affect sustainability unless it leads to action. Sustainability is everyone's responsibility and people are part of the system they work within or are trying to change so can contribute by being clear on what they have to offer. How people relate to their challenges is important.

This action plan template is designed to focus on planning outcomes, prioritising actions, assigning responsibilities and reviewing progress. Rather than being prescriptive, it is designed to ensure the plan can be structured to suit.

### *How to use it*

- Use the assessment results to identify the sustainability themes to work on.
- Copy the relevant headings into the tables.
- Plan actions, involving those that need to be involved.
- Print or create more pages if you need them.

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<b>SUSTAINABILITY THEME:</b>			
<b>Outcome or goal</b> to achieve in this area:			
<b>Resources, obstacles or enablers</b> that can affect the plans:			
<b>Actions</b> (What has to be done? What has to change? What's a priority? What is urgent? Is there a quick win? Build on strengths or address weaknesses?)	<b>Who by?</b> (Who takes responsibility? Who else needs to be involved?)	<b>When by?</b>	<b>Review and date</b> (When and how progress will be reviewed. Or, use this column to review progress against the goals.)
<b>Record of achievement</b> (e.g. Were goals achieved? What challenges emerged and what can be learned?)			
<b>Further action?</b>			

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<b>Record of achievement</b> (e.g. Were goals achieved? What challenges emerged and what can be learned?)			
<b>Further action?</b>			

# CASE STUDIES





# ALZHEIMER SCOTLAND



## The Challenge

Alzheimer Scotland runs a short breaks grants project for people with dementia and their carers. Through funding from the Short Breaks Fund we provide between 80 and 90 micro grants annually which allows carers and those they care for the chance to “imagine” what kind of short break would best meet their unique needs and then pay for it.

The challenge we faced was that carers found it difficult to visualise what a break could look like for them. If you have only been exposed to very limited choices it is difficult to think outside the box. This meant that many of the applications we received were superficial and formulaic, with little sense of personalisation. A lot of the applications were poorly costed and lacked information which made it difficult to assess them on their own merits. As a Time to Live project, it was unsustainable due to high levels of demand and a limited funding pot. Better costed applications would make the money go further.

## What We Did

We wanted to provide carers with some inspiring examples of what a short breaks could be. So we set out to create a collection of ‘digital memories’ on our website, recording in words and pictures the ways people had used their breaks creatively. But then our organisation decided to revise our website! We had to put the idea on hold.

So we decided to develop a written guide, taken from the questions we were being asked by carers. This took the form of a chatty dialogue, with the question being asked and the reply below.

As we had always hoped that the grants would complement the thinking underpinning Self-Directed Support, we used language such as ‘directing your own support’ and ‘managing your budget’ to encourage people to own their own breaks and feel comfortable taking the next steps in the future.

## The Difference It Made

The applications have become more personalised, better costed and more detailed, which reduces the need to chase up extra information. This helps our grant assessment process to be more efficient, as well as helping people to create more tailored breaks for themselves. **Interestingly, fewer applicants have asked for the maximum grant because they are now asking for what they actually need instead of a generic amount.** More applicants are using informal support networks (family and friends) to support their short breaks. And the bonus is that some referring agencies are using the guidance to illustrate what self-directed support could mean.



## What We Learned

We have learned that it is important to provide real examples for people, but not be too directive. We’ve learned that many carers don’t want to be separated from the person they care for, but to have quality time together. We’ve learned that small, regular chunks of time can be as valuable for some carers as a traditional holiday. And that simply being offered even a tiny grant can be a gift.

*“You don't realise the difference these breaks mean to people. Just getting the funding can help a carer value themselves and realise how important breaks are. It makes their year!”*

*(Carer Resource Worker)*

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# ANGUS CARERS CENTRE



## The Challenge

Angus Carers Centre works with carers to help them have a life outside of caring and help them have a say in developing services. We care for carers, let them know they are not alone and tailor our support to the individual.

From talking to parent carers of disabled children we became aware that there were no local social and leisure opportunities for disabled children and their families in Angus to enjoy together. There was clearly a need to provide quality "family-time" experiences for these families, but we were unsure how to go about it. Our challenge was that we lacked experience of providing direct services for the carer and the cared-for, particularly with children with physical and learning disabilities and behavioural problems.

## What We Did

Lacking the experience to develop a project like this from scratch by ourselves, we formed a partnership with Angus Council's Disability Team, (to provide sports and activity coaches at fun Sportzone sessions) and Cornerstone (to provide personal care for the children). These were informal arrangements initially, which led to some communication difficulties. We are now establishing more formal protocols. The partnerships were crucial but made planning for events more

complex, as we had to accommodate the different working practices and cultures of 2 quite different organisations.

## The Difference It Made

Families love the programme! They have told us that we provide the only opportunities from them to come together as a family in a safe, fun environment where they do not feel judged because of their child's condition or behaviour. Parents now make more use of local community facilities independently. Families who have met through our Family Programme now continue to meet informally, building their own social networks. **This means the impact of the work is being sustained, as families continue to strengthen informal peer support and to benefit from mainstream leisure services.**

The work has put the Carers' Centre on the radar of statutory services. We have strengthened our participation in the Angus Strategic Group for Children with Complex Needs. We also now take part in the Angus Respite Panel and the Autism Strategy Group.

This programme brought our Adult Carer and Young Carers Services much closer together and has deepened our commitment to a "whole family" approach.

## What We Learned

Short Breaks don't have to be expensive or complicated. Sometimes it's the low tech, low cost actions that make the biggest impact.

Work with those who have the skills. We didn't need to be expert in everything.

The biggest lasting difference is the informal support across families who were once very isolated.

Be prepared for unexpected outcomes and extra work: we hadn't anticipated such an increase in demand for carer support services as a result of families becoming aware of what we can offer. And we now know more about the needs of siblings, which is likely to lead to extra work for us.

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# FIRSTHAND LOTHIAN

**FirstHand Lothian has been delivering home based respite and support to families across Edinburgh who have a child with disabilities from birth to the age of 18, for over 23 years. The short break service offered families the choice of a 3-4 hour session weekly for 26 weeks or fortnightly for 52 weeks.**

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## The Challenge

Whilst this respite and support was valued by families and the feedback was positive, we were aware that when the service came to an end families were back where they started with a significant number waiting a year before reapplying for the same service again. This was not a sustainable way of working, for carers or the service. In addition, some parents or carers did not have the financial means to go out every week or fortnight. This was a barrier to the parent/carer fully benefitting from their respite. We were also concerned about the level of last minute cancellations.

## What We Did

The withdrawal of our Local Authority funding and contract gave us the opportunity to review our service. We wanted families to be at the centre of their support and to be more involved in maximising the benefit of it, short and long term. We started to ask families what they wanted to change as a result of having a

short break. This put the focus on outcomes and how the short break could become more meaningful and enable everyone in the family to benefit. Feedback clearly identified a need for more flexible respite and short breaks, predominantly at weekends, so we remodelled our service to meet these needs, ensuring that resources, staff and management are in place at the times when families need the service.

## The Difference It Made

The more flexible provision of short breaks at weekends has enabled parent carers to have time out with friends or siblings, and/or for the child with disabilities to access activities out of the home with their worker. Families now have greater benefit from fewer hours of respite, but delivered at the right time. Families are more flexible and understanding, negotiating when and how the short break takes place, in order to get the outcomes they want and last minute cancellations are now rare. Families' outcomes have improved. Families are now more involved, and hopefully also more prepared to take control and shape their support should they obtain Self-Directed Support funding.

Staff and volunteers can see first-hand the benefit of their input which is a real source of satisfaction and as a result they are more confident to negotiate with families when sessions need to be changed.



## What We Learned

**Sustaining our service and its impact involved identifying the needs of families seeking respite and being prepared to find practical solutions.**

To recruit and attract staff and volunteers to deliver flexible respite at the times required by families, we had to revise our recruitment processes; be explicit that demand for the service is out of school hours and at weekends; develop weekend contracts of substantive hours and invest in focused training for staff and volunteers in disability awareness and child care.

Respite can now change along the way as family circumstances change – in keeping with our ethos of respite being delivered when it is required and in ways that deliver maximum benefit.





# THE HAVEN – HAVEN @ HOME CARING CONNECTIONS



The Haven aims to improve the quality of life of people affected by life limiting illness, their family members and carers, with nurses, therapists and volunteers providing information, complementary therapies and emotional support. Short breaks for carers are delivered through Haven @ Home, and the flexible, home based nature of this service is particularly valued by those caring for loved ones with advanced illness or complex caring needs, who are less able to access support outwith their home environment.

## The Challenge

The Haven had recently expanded to three centres and it was imperative that the Haven @Home short break service could be sustained during this period of organisational growth. Haven @ Home faced the twin challenges of (a) ever-increasing demand (from new clients and from existing clients with long term caring responsibilities) and (b) uncertainty over continuation funding. As a result the service had to operate within very strict budget limits and the use of unrestricted funding previously used to meet additional demand was capped. This limited the ability of the service to accept new referrals.

## What We Did

Involvement in the Think Tank process provided a framework within which to assess long term sustainability of the service. It prompted us to review the model of delivery and costs; to ask difficult questions (about the role of nurses, pay rates for sessional staff, admin and management costs); to review client feedback and outcomes; to research alternative local service provision; and to engage with our Board of Directors ( showing the Shared Care Scotland Haven @ Home DVD). We formed a Board Finance and Sustainability Sub Group, reviewed staffing issues through the HR Sub Group, met with key influential policy makers and discussed Self-Directed Support and Service Level Agreements.

## The Difference It Made

Co-ordination of the service became the responsibility of the nurse, reducing admin and management costs, improving communication with therapists and enabling more flexible, responsive scheduling of appointments. The Board of Directors committed to retaining Haven @ Home as a core service and short term funding was secured as a result of their interaction with key decision makers. Five year funding was obtained to pilot a new model of service delivery utilising the skills of volunteer therapists and the Think Tank process helped us work through the application and provided clarity and focus on the proposal.

## What We Learned

**Sustainability is complex. It should be considered at the start of a project and inform project planning and delivery.** It involves listening to clients and staying focussed on their needs, while being realistic – we may not be able to do everything! It requires rigorous financial management, but is about more than money. It requires creative thinking, engaging with the Board of Directors, all team members and external partners – influencing the influencers. It may involve the development of additional skills within the staff team, to secure new sources of funding, eg. via Self-Directed Support and Service Level Agreements. As Chief Executive it's important to focus on sustainability of services as well as on sustainability of the organisation as a whole.

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## PAMIS FRIENDSHIP CLUB



### The Challenge

PAMIS works with people with profound and multiple learning disabilities and their families for a better life. In Fife we secured funding from the Short Breaks Fund to run a Friendship Club to allow people with complex disabilities and their family carers the opportunity to meet regularly, enjoy some story-telling, music and activities together, and to have fun. The club was loved by all the families who took part. Our challenge was to keep the club going, because our grant from the Short Breaks Fund was coming to an end. We wanted to secure the longer term sustainability of the Club so that families could continue to benefit.

### What We Did

In a timely coincidence, Shared Care Scotland sent out information about a forthcoming "Sustainability Think Tank" and I thought this would be perfect. At the time I equated sustainability with money. Surely all I needed to do to sustain the Friendship Club was to find funding. However, once I joined the Think Tank it quickly became apparent that sustainability was much broader than I had imagined.

Taking time out to attend the Think Tank initially seemed like a luxury, a day away from work! But on reflection it was hard work and time well spent. If I had not taken part in the Think Tank, I doubt I would have set aside time to reflect and think creatively about

sustainability issues. As a group we tested out a range of sustainability self-assessment tools and action plans that forced us to think critically about the sustainability factors for our entire organisations as well as the sustainability of individual projects.

### The Difference It Made

The group exposed me to different perspectives on short breaks and sustainability. For example one organisation applied a values based approach to all their projects; another considered things in terms of the "triple bottom line" (social, environmental and financial impacts); another used a brokerage approach to short breaks. I found the use of reflective questions at the meetings very productive. The Think Tank prompted me to think differently and I moved away from thinking about sustainability in terms of only money.

### What We Learned

For me, **sustainability is about really understanding what it is that your short break offers.** Before I had attended the "Think Tank" I would have said the PAMIS Friendship Club offered an activity on a Saturday morning. I now realise it offers much more - it offers education through stories; fun, friendships, companionship; a sense of belonging; a place where people with very profound disabilities and their families

are accepted and valued. **Knowing "the essence" of your project makes you think differently about what it is you are trying sustain.** I now intend to harness and nurture the goodwill of volunteers, keep things fun, engage with families and keep people with disabilities at the centre of all we do. And lastly, consider how to secure future funding!

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# PERTH AUTISM SUPPORT (PAS)

**Perth Autism Support provides services and support for children with autism and social communication difficulties and their families in Perth & Kinross.**



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### The Challenge

PAS was in a period of change and needed to examine the sustainability of the organisation and all service provision including the Short Breaks project. We recognised that sustainability is the responsibility of the whole staff team and not just the Trustees and Management, so sustainability became the theme of one of our bi-annual Staff Team Days

### What We Did

We adapted the Shared Care Scotland Sustainability Tools, making them relevant to each of the 8 areas of our service (including Short Breaks) and the organisation as a whole.

In the morning, we worked together in teams to examine sustainability of the organisation. This proved to be more challenging and lengthy than anticipated, with differing views and opinions, depending on what the participant's role was and how long they had been in post.

In the afternoon staff looked at sustainability of individual services, including short breaks. This proved much easier as staff worked on their own areas of service delivery and their in depth knowledge of each service made the task more relevant to them.

### The Difference It Made

The staff team are now more aware of the broader sustainability issues for the organisation as a whole. The senior management team are now more aware of any gaps in knowledge and understanding of staff and can address this.

All the staff team and Trustees are now aware of any sustainability issues, how they are being addressed and the part they play in the sustainability plan.

**Sustainability will stay high on our agenda as sustainability action plans have been developed for the organisation and for each area of service will now be used as the basis of appraisals and planning for the year ahead.**

Further training is being developed based on the evaluation forms and sustainability has been added to the agenda for each staff day in the future.

### What We Learned

If using the sustainability tools beyond the short breaks theme, preparatory work put in before the day to adapt them is invaluable.

Thought should be given to who facilitates the staff training day as there should be a good level of understanding of the staff's concerns and knowledge of the organisation.

If using the toolkit for organisation-wide and service level sustainability reviews, a two day event would allow more time for discussion and planning.







## TAGSA UIBHIST



### The Challenge

Tagsa Uibhist is a third sector care agency covering the southern Western Isles. In response to a stakeholder consultation, Tagsa took the brave decision to acquire and equip a 2-bedroom bungalow in South Uist to use as a respite care home. The respite home is now well established and well used, but has failed to generate enough income to make it financially viable. The challenge for us is to secure its longer term sustainability through making the most of the resource that we have, and attracting more business.

### What We Did

Tagsa successfully applied for a Short Breaks Fund grant to pilot and establish the new respite service. This allowed us to generate a lot more knowledge about what our clients wanted from a respite service and how best to meet their needs. We learned that some of our clients who need respite prefer to have support in their own home, and not in a care setting. The fund allowed us to deliver care in a more flexible way and to be a bit more imaginative. Over the period of funding we provided short breaks for 44 people either in the care home or in their own home on an outreach basis. Examples include:

- A week's overnight support in someone's own home to give the carer a break to go on holiday

- 24 hour care in the care home so the carer could attend a family wedding on the mainland
- 3 weeks 24 hour care in the care home, so the carer could attend to their sheep during lambing period

We realised that we needed to understand our costs better and so we used Shared Care Scotland's Unit Costing toolkit. The toolkit was very easy to use and it gave an accurate breakdown of what things actually cost. It was a shock to see the level of income we needed to make the operating costs sustainable and to break even. But it helped us win a Local Authority tender, because the costs were transparent and defensible.

### The Difference It Made

We have become more flexible in our thinking about what people want and need from a short break. We have started to look at other models of service delivery and at other potential business ideas in order to improve occupancy, meet needs better, and attract the revenue that the service needs to survive. To offer more choice to our clients we have started to look at day-care opportunities as an alternative to residential short breaks. And we are starting to look at the needs of young carers, which is a new development for us.

We have also started to explore commercial opportunities such as offering the bungalow as a holiday let to customers with care needs. We are now better placed to attract spot purchase through Self Directed Support because our short break costs are clear and transparent.

### What We Learned

We have learned to think more critically about what things actually cost and what the implications will be for our organisation. We have also learned to investigate more deeply what our clients actually need from us and how best to meet their needs. **Most importantly, sustainability is now an integral part of our organisational culture.**

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# SUPPORT





Shared Care Scotland is committed to supporting organisations to provide carers with an opportunity to get a break from their caring responsibilities. Since 2010, through the Scottish Government's Short Break Fund, we have been able to facilitate delivery of projects and grants which have increased the number and variety of short break opportunities throughout Scotland.

During this time, we have been proactive in developing a range of toolkits in conjunction with representatives from a number of organisations who have been funded through the Short Breaks Fund. These include:

#### **The Consultation Toolkit:**

Designed to help organisations find interesting and engaging ways of ensuring that the carer's voice is heard in any application to the Short Breaks Fund.

<http://www.sharedcarescotland.org.uk/resources/tools/consultation-toolkit/>

#### **The Evaluation Toolkit:**

Designed to help organisations monitor and review the effectiveness of their funded project.

<http://www.sharedcarescotland.org.uk/resources/tools/evaluation-toolkit/>

#### **The Unit Cost Tool:**

Created to help organisations work out the actual cost of service delivery.

<http://www.sharedcarescotland.org.uk/resources/tools/unit-costs/>

The Sustainability Guide has been developed to help to organisations plan strategies and deliver services with sustainability in mind. To help organisations implement this Guide, Shared Care Scotland are committed to providing support where possible. Examples of where we can assist with sustainability assessment and action planning include:

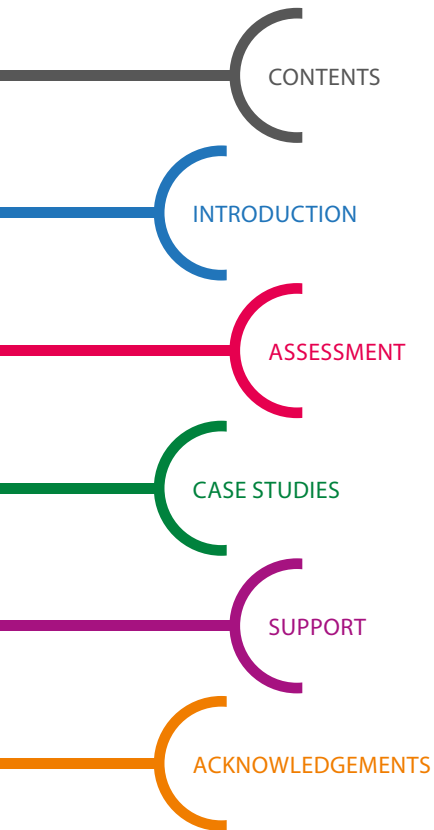
- **Supporting organisations through the Guide**
- **Sharing examples of how other organisations have used the Guide**
- **Identifying specialists who can provide targeted assistance to support organisational action plans**

For further information and assistance contact Shared Care Scotland.

Shared Care Scotland, Unit 2, Dunfermline Business Centre, Izatt Avenue, Dunfermline, Fife KY11 3BZ

Tel: 01383 622 462 Email: [office@sharedcarescotland.com](mailto:office@sharedcarescotland.com)

We also welcome feedback on the Guide and suggestions for how we can support people to use it.



# ACKNOWLEDGEMENTS



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# SUSTAINABILITY PROGRAMME PARTICIPANTS

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Angi Inch [Alzheimer Scotland - Action on Dementia](#)

Alison Myles [Angus Carers Centre](#)

Helen McAllister [Lanarkshire Carers Centre](#)

Raymond Jamieson [PKAVS](#)

Kathryn Martin [Tagsa Uibhist](#)

Janice Williams [The Haven](#)

Jo McPherson [Voluntary Action Shetland](#)

Rhoda Reid [Covey Befriending](#)

Kerry Shearer [Epilepsy Scotland](#)

Alan Roberts [Glenrothes Strollers FC](#)

Maureen McClelland [PAMIS](#)

Angela Ferguson [Perth Autism Support](#)

Hilary Gardner [Reach4Reality](#)

Jamie Armstrong [Trust Rugby International](#)

Jackie Given [Barnardos Inverclyde Family Support Team](#)

Bev Read [FirstHand Lothian](#)

Karen Anderson [Indepen-dance \(Scotland\)](#)

Lesley-Anne Livesay [PLUS \(Forth Valley\) Ltd](#)

Sandi Downing [Quarriers](#)

Frances Simpson [Support in Mind Scotland](#)

Jenny MacDonald [The Yard Adventure Centre](#)

Graeme Reekie [Wren and Greyhound](#)

Gary Waddell [Shared Care Scotland](#)

Alison Stevenson [Shared Care Scotland](#)

Christi Orr [Shared Care Scotland](#)



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Acknowledgements

Contact Details





Tel: 01383 622 462

Email: [office@sharedcarescotland.com](mailto:office@sharedcarescotland.com)

**Shared Care Scotland**  
Unit 2, Dunfermline Business Centre  
Izatt Avenue, Dunfermline, Fife KY11 3BZ

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