

## **SHARED CARE SCOTLAND 3-YEAR DEVELOPMENT PLAN: 2014-2017**

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 bring people together to share experiences, ideas and be creative
2. To advance good practice through research, learning exchange and service development
3. To provide accessible, up-to-date information and advice about short breaks to all who use, provide or plan services
4. To improve short breaks policy and practice at all levels through collaborative effort
5. To demonstrate excellent governance, efficiency and effectiveness within Shared Care Scotland

### **Priorities for Scottish Government Community Care (Section 10) Grants - 2014-15**

#### **To promote:**

- Person-centred and outcomes-focused community care services;
- Collaboration and joint working amongst and within agencies and organisations to improve outcomes for service users;
- Good mental health and well being;
- Attention and support for those with dementia, their families and other carers;
- Help and support so that people can live independently in the community, and improve quality of life;
- Support for carers and young carers;
- Co-production with users and carers in assessment and support planning as well as in the planning, development and delivery of services;
- Advice, advocacy, user led support, counselling and information services in relation to community care
- Community capacity building

## Organisational Objective 1

To bring people together to share experiences, ideas and be creative

### Relates to the following Scottish Government strategic objectives

- Support for carers and young carers;
- Person-centred and outcomes focused community care services;
- Collaboration and joint working amongst and within agencies and organisations to improve outcomes for service users;
- Good mental health and well being;
- Attention and support for those with dementia, their families and other carers;
- Co-production with users and carers in assessment and support planning as well as in the planning, development and delivery of services;
- Community capacity building

### Targets for this objective

#### 2014-15

- 1.1 We will continue to develop and support the lead officer **Sharing Practice Network** (SPN) delivering at least one themed 'conference' event each year. The themes for 2014-15 will connect to the (short break) actions identified in the Carers and Young Carers Strategy for Scotland. These include the role of Self-directed Support in providing more personalised breaks and approaches to building community capacity. Events will also reflect the issues that have emerged from our research into the strategic planning and provision of short breaks in Scotland. Each event will be arranged in partnership with one of our lead officer Network members.
- 1.2 We will continue to develop our **Action Learning Set** (*peer led*) approach to supporting innovative developments in short break planning and provision. In 2014-15 we will complete our ALS led Consultation Toolkit and provide further support to our expanding network of **Short Break Bureau** managers. Future ALS themes will be developed during 2013-14 – informed by our Short Breaks Fund evaluations, feedback from our Networks and national policy and practice priorities.
- 1.3 We will continue to support and develop our **Short Break Service Providers Network** by arranging 3 regional events. This has proved to be the preferred model rather than a larger more centralised event. The theme of each event will be determined with advice from the network. Preparing for self-directed support and methods of outcome evaluation have been highlighted at recent events and therefore we expect to focus on these areas at our events this year.
- 1.4 We will consult with key stakeholders on the development of a **template agreement/service specification contract** for service users/carers who wish to commission their own short breaks from providers using self-directed support. If there is sufficient interest we will develop a plan to take this work forward using an Action Learning Set approach. Some groundwork has already been undertaken by Scotland Excel as part of their national Framework Agreement for residential short breaks for children.
- 1.5 We will continue to develop the new **Short Breaks Stories** website which will provide a platform for Short Breaks Fund projects to share their learning and to promote the diverse range of short breaks which are being supported. During the year we will ensure projects are ready to use this online reporting system. We anticipate this new resource will help promote the creative approaches that are being used to deliver breaks which deliver more personalised outcomes.
- 1.6 We will continue to support third sector short break providers to develop their services through the **Short Breaks Fund**. We will arrange local workshops to help

organisations understand the grant criteria and SBF outcomes to improve the quality of programme applications. We will provide a **Learning Exchange** programme of training to funded organisations to help them measure and evaluate the impact of their work. Our new 'Easy Guide to Evaluating Short Breaks' will be an important resource that will support this work.

- 1.7 Subject to a decision from Scottish Government on the **continuation of the Short Breaks Fund**, we will carry out an in-depth review of the Short Breaks Fund programmes with stakeholders. This will inform the objectives and priorities for the Fund going forward. This work will commence in the 2<sup>nd</sup> half of the year - or as soon as we have a decision about future funding.
- 1.8 We will commission a further set of at least four **filmed Short Breaks Case Studies** to add to those already available. These will focus on short breaks for adults and older people, including services for people with dementia and adults with a learning disability.
- 1.9 We will plan and deliver a 1-day 'themed' **national conference** aimed at all stakeholders. Our national conference is held every two-years. We will use the event to showcase the best examples of personalised breaks from around the country, and to promote alternative, innovative approaches to achieving a successful break.
- 1.10 We will aim to progress the '**Respitivity**' initiative with support from the Hospitality Industry Trust (HIT). Our aim is to pilot this in at least one local authority area in 2014. We have agreed a partnership with Fife Carers Centre to take this work forward.
- 1.11 We will continue to support and be represented on the **FSDC coalition**. FSDC will be re-launched in October 2013 and we anticipate working closely with the coalition to maintain a focus on improving short breaks and leisure opportunities for disabled children, young people and their families. In 2014 we will work with the FSDC Coordinating Group to identify priority areas for action going forward. We will share these with the Scottish Government's Disabled Children and Young People Advisory Group to coordinate this work with their plans.
- 1.12 Following on from a successful travel bursary in 2012, we will seek sponsorship to establish a further bursary to assist at least two smaller short break providers to send a representative to the **International Short Breaks Association (ISBA) Conference** in Wolfenbuttel, Germany in 2014.
- 1.13 We will consult on the development of a **holiday house-swapping** service for people with disabilities and their families to swap houses with people that share similar accessibility needs. If there is sufficient interest in such a service we will bring forward a plan to progress this service.

### **2015-16**

- 1.14 We will plan and deliver a further **Sharing Practice Network** conference event to our Lead Officer network. We will do this in partnership with one of our network members.
- 1.15 We will plan and deliver three regional **Service Provider Network events**.
- 1.16 We will continue the development of our **Action Learning Sets**. Between 2014-17 we would like to use the ALS format to explore initiatives around co-production and community capacity building, and short breaks.
- 1.17 We will continue to support the **Short Breaks Fund**. If the funding is to be discontinued then we will support funded organisations to the end of their projects and publish our final end-of-programme evaluation report. We will discuss with Scottish Government any further requirements they have regarding the completion of the funding programme. If the Short Breaks Fund is to be continued then we will launch the next phase of funding and learning exchange activity

following our consultation on forward priorities.

- 1.18 Subject to the findings of our consultation exercise, we will support the development of a **holiday house swapping service**. We will explore whether this can be achieved through a partnership with an existing mainstream or more specialist house swapping service.

### **2016-17**

- 1.19 We will plan and deliver a 1-day **national conference** aimed at all stakeholders.
- 1.20 We will plan and deliver a further **Sharing Practice Network** conference event.
- 1.21 We will plan and deliver three regional **Service Provider Network** events.
- 1.22 We will continue the development of our peer support **Action Learning Sets** with a focus on testing initiatives around co-production and community capacity building, and short breaks
- 1.23 Subject to funding, we will continue to support and develop the **Short Breaks Fund**, continue to support funded projects through a programme of **Learning Exchange** events and peer support activities, and continue to publish impact reports, statistical analysis and learning through the **Short Breaks Stories** SBF reporting website.

### **Key outputs for this objective**

- We will have delivered at least three SPN and 'themed' conferences and produced reports from each event.
- We will have delivered nine Provider Network events.
- We will have planned and delivered a range of practitioner-led Action Learning Sets.
- We will have collated case study examples of good practice in delivering flexible, personalised approaches to short break provision, including a library of digital stories.
- We will have facilitated joint comment on national policies for short breaks
- We will have produced research based practice guidance to support the ongoing development of short breaks and respite care, particularly in relation to personalisation and outcomes-focused service improvements.
- We will have delivered two national conferences attended by approximately 300 people.
- We will have delivered a further 3 years of Short Breaks Funding reaching carers and services users across Scotland. With potentially a further six programmes we estimate this could generate 23,000 short breaks over this period.

### **Monitoring arrangements for this objective**

- The Shared Care Scotland Board meets every three months and receives progress report on targets and milestones
- The Business and Finance sub-committee meets every two months and monitors financial spend against income and maintains a strategic overview of staff performance
- The Terms of Reference of Sharing Practice Network are reviewed annually to ensure the network continues to provide intended benefits
- Steering groups (with Board and stakeholder representatives) will be established to oversee our research work and development projects.
- The Short Breaks Fund programmes are each overseen by two independent Grants Advisory Panels and the Fund as a whole is overseen by an Oversight

Group which includes representatives from the Scottish Government.

### **Evaluation arrangements for this objective**

- Pre and post event questionnaires are used at each SPN conference. SPN interim and full review will be undertaken to determine wider benefits and impact.
- Feedback forms are issued with all publications and services. We will aim for a 30% response for events and 10-15% response for telephone and online services.
- All events and services will ask participants to score 'Value for Time' as a consistent measure of our performance, and our Learning Exchange programme for Short Breaks Funded projects will be evaluated against the specific programme outputs and outcomes.
- In piloting new initiatives (e.g. Respitality) we will put in place feedback systems so that we can properly evaluate the benefits and costs before proceeding to full development.
- Our Short Breaks Fund programmes each have a detailed reporting system where projects report twice a year on their performance against their stated outcomes and targets. These are collated into a programme reports which is shared with stakeholders and published on the Shared Care Scotland website.

### **Reporting arrangements for this objective**

- The strategic plan, annual work plan, Board progress reports and annual reports are the principal reporting documents and are available to the Scottish Government
- Staff from the Scottish Government routinely attend and contribute to Shared Care Scotland events and meetings, including Short Breaks Fund Grants Panels
- Shared Care Scotland contributes to government policy developments drawing on the views and experiences of people and organisations in our network
- Publications will be sent to Carers Policy Branch
- The Short Breaks Fund – Short Breaks Stories online database will be accessible to anyone that wishes to see evaluation reports from the funded projects. This will be available from 2014.
- Minutes of meetings will be produced and made available as necessary

## **Organisational Objective 2**

To advance good practice through research, learning exchange and service development

### **Relates to the following Scottish Government strategic objectives**

- Person-centred and outcomes focused community care services;
- Collaboration and joint working amongst and within agencies and organisations to improve outcomes for service users;
- Good mental health and well being;
- Help and support so that people can live independently in the community, and improve quality of life;
- Support for carers and young carers;
- Co-production with users and carers in assessment and support planning as well as in the planning, development and delivery of services;

- Advice, advocacy, user led support, counselling and information services in relation to community care
- Community capacity building

### Targets for this objective

#### 2014-15

- 2.1 We will publish and disseminate the **Consultation Toolkit** which will be developed by our Action Learning Set in 2013-14. The Toolkit will assemble a range of good practice materials that will support those who provide, plan or pay for short break services to consult effectively with carers and those they care for in a range of settings.
- 2.2 We will source funding in 2013-14 to recruit, train and support a group of volunteer **Short Breaks Ambassadors** to increase our capacity to contribute to local and national events to help us share inspiring examples of personalised short breaks, good practice and learning. We will aim to recruit and induct 6 Ambassadors in the first year.
- 2.3 We will continue to liaise with the network of local Carer Centres around Scotland to arrange **Local Briefings** on our information services, and to update people on developments in short breaks policy and practice. We would expect SDS and short breaks to be a key theme for these briefings over the next 3 years. We will aim for at least 12 briefings over the course of the year.
- 2.4 We will continue to develop our library of filmed **Short Break Case Studies** to illustrate alternative models of provision, and capture the experiences of carers and supported people.
- 2.5 We will make arrangements for at least two Scottish Government **Minister-led** visits to Short Breaks Fund projects during the year. These will be an opportunity for Minister(s) to meet the recipients and beneficiaries of funding.
- 2.6 We will carry out **research** which supports the application of good practice in planning and delivering short break services. Future research priorities will be determined in 2013/14 and will be informed by the findings/recommendations from our recent research work which examined both strategic short breaks planning in local authorities and health boards, and carers experiences of short break provision. Areas of research we anticipate over the next 3 years include: the impact of Self-directed Support on short breaks provision; researching the quality and accessibility of local information about short breaks; exploring the different approaches to eligibility criteria in deciding levels of respite provision; developing opportunities to expand short breaks provision through volunteering/mutual support networks, reaching BME carers/care recipients and other groups facing particular barriers. We will discuss these and other research priorities with the Scottish Government. We will also liaise with NCO partners through the recently established Carers Research Advisory Group
- 2.7 We will continue to support the involvement of young carers and adult carers in the ongoing development of the **Short Breaks Fund** through their involvement in the Grants Panels and Oversight Group.
- 2.8 Applicants to the Short Breaks Fund will be expected to evidence they have involved carers and service users in developing their project plans and evaluating the outcomes. We will offer training in the use of the **Evaluation Toolkit** and the new **Consultation Toolkit** to support providers to be more confident in these areas.
- 2.9 We will produce the first in a series of **Guidance Notes** on using Self-directed Support for short break/respite care purposes. These will be aimed at carers and care recipients, including a separate guidance note aimed at **young carers**.
- 2.10 We will continue to be involved in the development of 'for Scotland's Disabled

Children'. We will work with coalition members to identify opportunities to influence policy and practice which aims to **improve access to more mainstream breaks**, leisure and recreational opportunities for disabled children and young people, as well as more specialist services. We will connect this work to the Short Breaks Fund and its forward priorities.

- 2.11 We will plan and deliver a 1-day 'themed' **national conference** aimed at all stakeholders. Our national conference is held every two-year's. We will use the event to showcase the best examples of personalised breaks from around the country, and to promote alternative, innovative approaches to achieving a successful break. In 2014 we have provisionally identified 'Building Capacity' as the theme for the event.
- 2.12 We will investigate the feasibility of a weekend **Festival-style event** for adult carers along similar lines to the Scottish Young Carers Festival. In the same way, the Festival would provide a weekend break for carers but would also be an opportunity for carers to pick up information, share experiences and benefit from peer support. In 2014-15 we would identify partners for this work, develop and consult on the plan and, if there was consensus to proceed, apply for funding,

### **2015-16**

- 2.13 We will continue to support the development of good practice tools and resources through our **Action Learning Set** method of peer learning.
- 2.14 We will continue to support and develop our team of **Short Breaks Ambassadors**. We will bring Ambassadors together at least twice during the year for planning and reviewing purposes. We will aim to maintain at least six ambassadors this year.
- 2.15 In the 2<sup>nd</sup> half of the year we will commence work on following up our 2012 Rest Assured research into **carers experience of short breaks**. We will consult on the scope of the research and identify project partners. The research will help us evidence any changes in the quality, availability and pattern of provision since the last survey. The impact of SDS will be of particular interest.
- 2.16 We will review and, if necessary, update our other **research priorities**. We will consult with Scottish Government and the NCO Carers Research Advisory Group.
- 2.17 Subject to funding, we will continue to develop our library of filmed **short break case studies**. We will aim to commission a further four case studies over the course of the year.
- 2.18 We will continue to deliver our **Local Briefings** to carers and service users through their local support groups and organisations.
- 2.19 Subject to the findings of our feasibility study and a successful funding application, we will work with partners to deliver a weekend adult **Carers Festival**.
- 2.20 We will continue to involve carers and service users in the development of our Short Breaks **Guidance Notes** to help families source and arrange their own breaks.
- 2.21 We will continue to be actively involved with **networks, coalitions and alliances** that support the participation of carers and service users in policy and practice developments. In 2015-16 we will review our contributions to these existing networks and map others that we should be seeking a more formal connection with.

### **2016-17**

- 2.22 We will continue to support the development of good practice tools and resources through our **Action Learning Set** method of peer learning
- 2.23 Towards the end of the year, we will review the **Short Breaks Ambassadors** network to determine if this has proved an effective way to disseminate good practice and to review the experience for those involved.
- 2.24 We will complete, publish and disseminate our updated research into **carers**

### **experience of short breaks**

- 2.25 We will plan and deliver a 1-day **national conference** aimed at all stakeholders.
- 2.26 We will commence work to determine the priorities for our **next strategic plan**. We will use a range of consultation methods to engage our stakeholders in this process.

### **Key outputs for this objective**

- We will have developed a range of practical tools to improve carers and service user engagement in the planning, commissioning and evaluation of short breaks provision
- We will have updated information on carers' experience of short breaks and the impact of SDS and other developments on the pattern of provision.
- We will have increased awareness of alternative models of short breaks provision and helped carers and service users to feel more confident about using self directed support to achieve the break that they want.
- We will have delivered two national conferences attended by approximately 300 people.
- We will have a better understanding of the level of short breaks provision across Scotland, based on up-to-date research evidence.

### **Monitoring arrangements for this objective**

- The Shared Care Scotland Board meets every three months and receives progress report on targets and milestones
- The 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
- Steering groups (with Board and stakeholder representatives) will be established to oversee our research work and development projects. We will use online steering groups and 'Go To Meeting' web meetings as necessary to reduce peoples' travel and time costs.

### **Evaluation arrangements for this objective**

- Through our 'Local Briefings', the efforts of Ambassadors, our continuing engagement with practitioners through peer networks and learning exchange, and the use of our Evaluation and Consultation Toolkits - we would expect to see evidence of improved approaches to service planning leading to better experiences for both carers and service users. It would be difficult (and inappropriate) to attribute progress specifically to our efforts however we would hope progress will be evident from our planned research work and from consulting with carers and service users at events and local briefings.
- Any externally funded projects will have their own evaluation frameworks and we will produce evaluative material as required.
- Post event questionnaires will be used for each conference/event. We will aim for an 30% response rate.
- All events and services will ask participants to score 'Value for Time' as a consistent measure of our performance.

### Reporting arrangements for this objective

- The strategic plan, annual work plan, Board progress reports and annual reports are the principal reporting documents and are available to the Scottish Government.
- Staff from the Scottish Government routinely attend and contribute to Shared Care Scotland events and meetings.
- Shared Care Scotland contributes to government policy developments drawing on the views and experiences of people and organisations in our network.
- Externally funded projects will have their own reporting systems and we will comply with these.
- We have a comprehensive reporting system specifically for the Short Breaks Fund which gathers a range of outcome and statistical data from funded projects.

### Organisational Objective 3

To provide accessible, up-to-date information and advice about short breaks to all who use, provide or plan services

### Relates to the following Scottish Government strategic objectives

- Person-centred and outcomes focused community care services;
- Collaboration and joint working amongst and within agencies and organisations to improve outcomes for service users;
- Good mental health and well being;
- Help and support so that people can live independently in the community, and improve quality of life;
- Support for carers and young carers;
- Co-production with users and carers in assessment and support planning as well as in the planning, development and delivery of services;
- Advice, advocacy, user led support, counselling and information services in relation to community care
- Community capacity building

### Targets for this objective

#### 2014-15

- 3.1 We will **expand the range of services on our online service directory** and continue to update the content on the website. We would anticipate having 450 services registered on the directory (currently 380 in 2013) by the end of the year.
- 3.2 We will complete our interim upgrade of the online directory to improve search features and to make the site **mobile friendly**. As part of this upgrade we also intend to provide people with the option of adding their own feedback on short break services they have used. This will be decided once we have considered the options and found a reliable means of taking this forward.
- 3.3 We will continue to **promote the website and directory** by distributing our new leaflet and poster information, and through our local briefing events. We will continue to promote the use of our Directory Widget - our free to use application which enables organisations to provide access to our service information from their websites.
- 3.4 We will continue to work with NHS 24 on the development of the **Care Information**

**Scotland** website and ensure our Directory is ready to be linked to this new resource when it is launched. We will also develop links to other larger aggregated information directories such as ALISS.

- 3.5 We will launch a new **Short Breaks Stories** website, a platform for Short Breaks Funded projects to share their learning and to promote the diverse range of short breaks which are being supported. During the year we will also prepare funded projects to be ready to use this online system for reporting back on their work.
- 3.6 We will continue to provide our **telephone enquiry service**. We will use our enquiry database to record and report annually on the number, source and type of enquiries dealt with. This information is helpful in identifying any patterns in the search for services. We will also look at options for working towards an externally awarded quality assurance standard.
- 3.7 We will continue to publish our **e-bulletins** every 2 months. These will be archived on our website. We will monitor the level of interest in these bulletins through our reporting software.
- 3.8 We will produce the first in a series of **Guidance Notes** on using Self-directed Support for short break/respite care purposes.

### **2015-16**

- 3.9 We will continue to promote and develop our **online service directory** and **website**. We will aim to increase the number of visitors by 10% per year.
- 3.10 We will continue to **liaise with service providers** to ensure they keep their information up-to-date and work with local authorities and carer centres to identify additional services to add to the directory.
- 3.11 During the 2<sup>nd</sup> part of the year, we will apply for funding to commission the development of a **new Shared Scotland website** and service directory. The existing platform will be 7-years old and we anticipate it will not have the capabilities we will need going forward. We will also explore the creation of an 'App' to provide easy access to the directory from mobile platforms. We estimate a total cost of £25-30,000 but this will be clearer once we have scoped our requirements. Included in this work will be a refresh of the SCS brand identity.
- 3.12 Subject to a decision on the continuation of the Short Breaks Fund, we will develop an **online application process** for projects applying to the SBF. This will be integrated with the Short Breaks Stories website so that the application and reporting process becomes part of the same system to reduce the workload on projects.
- 3.13 We will continue to provide our **telephone enquiry service** and monitor user feedback and the types of enquiries responded to. We will achieve a Quality Assurance standard for our information services.
- 3.14 We will continue to publish our **e-bulletins** every 2 months. This will be rebranded in line with our website refresh. We will look at the need for a separate and differentiated e-bulletin that is targeted more specifically at service providers and service planners.
- 3.15 We will seek funding to replace our main **Shared Care Scotland information leaflet, directory leaflets and display materials**. This would be required as part of our rebranding exercise, should we be successful in sourcing funding.
- 3.16 We will continue to develop our range of **Guidance Notes** to help those using self-directed support to source and arrange the break they want. We will consult on the content of a Guidance Note on short breaks for **BME communities**.

### **2016-17**

- 3.17 Subject to funding, we will complete our **website and directory rebuild** and

rebranding exercise. We will transition to the new site in 2016-17. We will commence replacement of old promotional materials with new to reflect the new brand identity.

- 3.18 We will **liaise with providers** to ensure they are updated on the new directory and any new systems for keeping their information up-to-date. We will promote the new website and directory and work with local authorities, carer centres and others to continue to increase the range of services on the directory.
- 3.19 We will continue to develop the **Short Breaks Stories** website by working with SBF projects to upload case study examples, learning outcomes, and statistical information.
- 3.20 We will continue to provide our **telephone enquiry service** and monitor user feedback and the types of enquiries responded to.
- 3.21 We will continue to publish our **e-bulletins** every 2 months. These will be refreshed to reflect the new brand identity.
- 3.22 We will continue to develop our range of **Guidance Notes** to help those using self-directed support to source and arrange the break they want.

### **Key outputs for this objective**

- An expanding and highly accessible national directory of short break services which will support commissioners and individual purchasers, and promote choice and control
- A comprehensive website covering all aspects of short breaks policy and practice, including a catalogued research library, evidence-based good practice examples, case study materials, digital stories, planning and evaluation tools, news and updates from around Scotland
- A telephone support service to guide people to the information and/or support they are looking for
- A range of materials to promote and support the development of more flexible, personalised breaks

### **Monitoring arrangements for this objective**

- The Shared Care Scotland Board meets every three months and receives progress report on targets and milestones
- The Business and Finance sub-committee meets every two months and monitors financial spend against income and maintains strategic overview of staff performance
- Steering groups (with Board and stakeholder representatives) will be established to oversee our development projects. We will use online steering groups and 'Go To Meeting' web meetings as necessary to reduce peoples' travel and time costs.
- Externally funded projects will have their own reporting systems and we will comply with these.
- We have a written procedure for checking and approving new service records before they are published on the service directory.
- We have response time targets for responding to our telephone and written enquiries and these are monitored by the Chief Executive

### **Evaluation arrangements for this objective**

- We aim to increase the number of people visiting the Shared Care Scotland main website by 10% per year. The baseline figure (2013) is 23,453 visitors.

- We have set targets for new services to be added to the online directory.
- We use Analytics software to monitor the patterns of visitor interaction with our website use and the levels of interest in our e bulletins. This provides a proxy indication of how useful people find these communications.
- Known frequent users of the directory (carer centres, short break bureaux) are approached directly to feedback on and to contribute to the ongoing development of the service directory.
- We have developed an online questionnaire to allow people to feedback their experiences of using the service directory, telephone enquiry services and website.
- In developing our communications strategy we will consult with users of our services to identify any improvements needed or new services required.

#### **Reporting arrangements for this objective**

- The strategic plan, annual work plan, Board progress reports and annual reports are the principal reporting documents and are available to the Scottish Government.
- Staff from the Scottish Government routinely attend and contribute to Shared Care Scotland events and meetings.
- E-bulletins and other publications will be sent to Carers Policy Branch within the Scottish Government and they will be able to experience the website and directory online
- Shared Care Scotland contributes to government policy developments drawing on the views and experiences of people and organisations in our network

#### **Organisational Objective 4**

To improve short breaks policy and practice at all levels through collaborative effort

#### **Relates to the following Scottish Government strategic objectives**

- Collaboration and joint working amongst and within agencies and organisations to improve outcomes for service users;
- Support for carers and young carers;
- Advice, advocacy, user led support, counselling and information services in relation to community care

#### **Targets for this objective**

##### **2014-17**

- 4.1 Over the period of the 3-year strategy we will pay particular attention to the ongoing development of **self-directed support**, and the reform agendas on '**Shifting the Balance of Care**' and '**Reshaping Care for Older People**' and contribute as appropriate. More specifically, we will contribute to the development of more integrated services and to support **strategic commissioning** and **market development** which aims to improve the quality, choice and availability of short breaks and respite care.

In pursuing this work, we will develop collaborative relationships with the following organisations and groups:

- With the national and local carer organisations/networks
- With short break service providers and disabled people organisations through our directory developments, our providers networks, our research work and through our activities related to the Short Breaks Fund
- With Scottish Government through our involvement in the implementation of the Carers Strategy, the Short Breaks Fund and to other carer-linked Scottish Government led strategies including those relating to Dementia, Learning Disability and Self Directed Support
- With local authorities and health and social care partnerships through our lead officer network events, conferences, action learning sets, research work and development projects
- With national funding organisations including the Life Changes Trust, Big Lottery and Scotland's Funders Forum/Funders Frontline
- With national coalitions and consortiums such as 'for Scotland's Disabled Children', CCPS, SCLD, The Alliance
- With regulators including the Care Inspectorate.

We also aim to develop stronger links to **independent advocacy organisations** and also to organisations providing centralised national sources of information on carer and care support services, such as **ALISS** and **Care Information Scotland**.

- 4.2 We will work with NCO colleagues to continue to **strengthen collaborative working** between our organisations. We will ensure we are making the best use of our mutual capacity. We will contribute to the Scottish Government NCO review exercise.
- 4.3 We will continue to work to maintain a high level of **political awareness** of the importance of short breaks and respite care. We will work closely with the NCO policy group, the NCO carers research advisory group, FSDC and other strategic partnerships to achieve this. We will also participate in key fora including the Carers Parliament and the Scottish Parliament Cross Party Carers Group.
- 4.4 We will continue to provide **policy briefings** and analysis on the changing patterns and trends in short breaks provision. We will source and publish external research on short breaks and respite care from other countries, as well as undertaking our own research.
- 4.5 We will continue our involvement with the **International Short Breaks Association (ISBA)** and share information from events with our network. We will work with colleagues in England, Wales and North Ireland to exchange policy and practice information. We will also work towards **Scotland hosting an ISBA conference by 2020**.
- 4.6 We will continue to take the lead role, on behalf do the NCO group, in supporting the development and implementation of the Scottish Government's **Short Breaks Fund** until the 2014-15 programme is completed. Should the Short Breaks Fund continue to be resourced beyond 2015 then we will work with Scottish Government, the NCOs and other stakeholders to agree how the Fund should be taken forward.

#### **Key outputs for this objective**

- We will have developed joint working agreements/compacts with partners
- We will have developed communications to support collaborative working, building mutual capacity to achieve better outcomes for carers and cared for people, and the best use of resources.
- We will have structured and purposeful relationships with key partners helping to facilitate effective 2-way communication between SCS stakeholders, regulatory organisations and the Scottish Government.

- We would hope to have hosted an international short breaks conference by 2020.

#### **Monitoring arrangements for this objective**

- Shared Care Scotland Board meets every three 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
- Have Your Say/Local Briefings and other stakeholder events will also provide opportunities to gain feedback on our various initiatives and services
- Ongoing meetings with NCO representatives to review activity and plan ahead
- Our Short Breaks Fund programmes each have a detailed reporting system where projects report twice a year on their performance against their stated outcomes and targets. These are collated into programme reports which are shared with stakeholders and published on the Shared Care Scotland website.

#### **Evaluation arrangements for this objective**

- Through reviews of our joint working agreements, we would expect to see evidence of collaborative working producing better outcomes for carers and cared for people, and effective use of resources.
- We would expect the improvement of short break provision to be a stated government priority with strong cross political party support

#### **Reporting arrangements for this objective**

- The strategic plan, annual work plan, Board progress reports and annual reports are the principal reporting documents and are available to the Scottish Government.
- Staff from the Scottish Government routinely attend and contribute to Shared Care Scotland events and meetings.
- Newsletters and other publications will be sent to Carers Policy Branch.
- Reports of meetings will be produced and made available as necessary.

### **Organisational Objective 5**

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

#### **Relates to the following Scottish Government strategic objectives**

- Proper control and management of Scottish Government resources
- Development of financial stability and independence

#### **Targets for this objective**

##### **2014-15**

- 5.1 We will **support our Board members** and advisors by reviewing individual and collective training needs relating to good governance, and by sourcing training that will address any identified needs.

- 5.2 We will enrol in the ACOSVO **Governance Support programme** (Scottish Govt. Institute of Directors, Scottish Business in the Community partnership).
- 5.3 We will continue to **recruit and induct new Board Directors/Advisors** as and when required to ensure we have the necessary balance of skills, knowledge and experience.
- 5.4 We will complete an annual **Risk Management analysis** (following recommended guidelines) to help us identify, evaluate and manage any risks to the ongoing success and viability of the organisation. If necessary we will take external expert advice on this.
- 5.5 We will complete our review and refresh of our **Articles of Association**
- 5.6 We wish to **strengthen our organisational structure** to increase our capacity to deliver our strategic activities but which will be sustainable in terms of cost.

During 2014-15 we would like to create a new post (**Development & Network Support Manager**) to lead our project development work and to support our networking/partnership activities. Key areas of work we anticipate being taken forward would include:

- Developing demonstrator short break projects and services - in partnership with local authorities and partners – to test new models that help to build capacity
- Ongoing support to our Short Breaks Bureau network
- Leading the development of Respite
- Assisting with our expanding programme of Shared Care Scotland events
- Developing additional services specifically for members of Shared Care Scotland

*The post would release some capacity within the current staff structure to take forward other areas of work. This would apply to the Communications Developer post and CEO in particular.*

- 5.7 We will aim for **financial stability** by generating new sources of income. We would anticipate, as before, that core running costs will be met through our Section 10 grant but other costs (e.g. research, project related work, training) will be self-financing either through charging, or through raising income from other grants and trusts. We will continue to include a core cost recovery figure in all future bids for project related funding.
- 5.8 We will **invest in IT and communication systems** where these will help us to operate cost effectively and efficiently, and also continue to deliver excellent service. We will explore further uses of our online meeting software to achieve time and cost savings for training, networking and meetings.
- 5.9 We will **survey our stakeholders** to take their feedback on the services and support we provide. We will use 'Value for Time' as a key indicator to measure the relevance and usefulness of the services we provide.
- 5.10 We will review and update the **Shared Care Scotland Staff Handbook** and take external expert advice to ensure we remain legally compliant.
- 5.11 We will **invest in staff development** and allocate a minimum of 2% of salaries towards training and development. We will encourage and support employees to access training that will help them in their job role.

## **2015-16**

- 5.12 We will **continue to support our Board members** and advisors by reviewing individual and collective training needs relating to good governance, and by sourcing training that will address any identified needs.

- 5.13 We will continue to **recruit and induct new Board Directors/Advisors** as and when required to ensure we have the necessary mix of skills, knowledge and experience.
- 5.14 We will continue to participate in the **ACOSVO governance programme**
- 5.15 We will complete our an annual Risk Management analysis
- 5.16 We will **continue to develop an organisational structure** which will increase our capacity to deliver our strategic activities but will be sustainable in terms of cost.
- 5.17 We will continue our efforts to achieve a **more sustainable mix of income** and maintain financial stability.
- 5.18 We will continue to **invest in IT and communication systems** where these will help us to operate cost effectively and efficiently, and deliver excellent service.
- 5.19 We will continue to **monitor the quality and relevance of our services** through surveys and
- 5.20 We will **continue to support staff development.**
- 5.21 We will **update our 2014-17 strategy** and produce a detailed work plan for 2015-16.
- 5.22 Towards the end of 2015-16 we will commence consultation with stakeholders on the **development of our 2017-2020 Strategic Plan.** This will involve an in-depth review of our strategic priorities including our vision, aims and core activities.

### **2016-17**

- 5.23 We will **continue to support our Board members and advisors** by reviewing individual and collective training needs relating to good governance, and by sourcing training that will address any identified needs.
- 5.24 We will **continue to recruit and induct new Board Directors/Advisors** as and when required to ensure we have the right mix of skills, knowledge and experience.
- 5.25 We will **review our participation in the ACOSVO governance support programme** with a view to determining future training and support needs from this source.
- 5.26 We will complete our an **annual Risk Management analysis**
- 5.27 We will continue to **develop an organisational structure** which will increase our capacity to deliver our strategic activities but will be sustainable in terms of cost.
- 5.28 We will continue our efforts to achieve a **more sustainable mix of income and maintain financial stability.**
- 5.29 We will continue to **invest in IT and communication systems** where these will help us to operate cost effectively and efficiently, and deliver excellent service.
- 5.30 We will **update our 2014-17 strategy** and produce a detailed work plan for 2016-17.
- 5.31 We will complete the review of our strategic priorities and **publish our 2017-2020 Strategic Plan.**

### **Key outputs for this objective**

- We will have a strong Board of Directors with the right mix of skills, knowledge and experience to provide excellent governance to the organisation.
- 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 three 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 one-to-one meetings and six monthly appraisals
- Have Your Say consultation events and the AGM will also provide opportunities for members to provide feedback on our various initiatives and services

### **Evaluation arrangements for this objective**

- We will conduct an annual review of Board performance against the targets set out in the Board development plan and using the 'How Good is Your Board' toolkit.
- Staff performance will be measured against targets set out in individual work plans which are based on our 3-year strategic plan.
- Work plan progress reports will be presented to Board meetings and sub committees by the Chief Executive
- Service user surveys will be used to measure satisfaction with services received

### **Reporting arrangements for this objective**

- The strategic plan, annual work plan, Board progress reports and annual reports are the principal reporting documents and are available to the Scottish Government
- Staff from the Scottish Government routinely attend and contribute to Shared Care Scotland events and meetings
- Minutes of meetings will be produced and made available as necessary
- Shared Care Scotland contributes to government policy developments drawing on the views and experiences of people and organisations in our network