



Erskine Strategy 2018 - 2022

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1.0 Introduction

Erskine's Mission is to enable members of the ex-Service community to get the best care and support to achieve maximum quality of life. Underpinning this Mission, Erskine has the following charitable objectives:

The provision of financial support to men and women with a current or former record of armed service or service in support of, or alongside the armed services together with dependents or surviving dependents of such personnel

The provision of long-term, short-term and respite nursing care within the United Kingdom

The provision of health care including residential long-term care, residential short-term and respite care, day care, domiciliary care and appropriate relevant recreational and therapeutic programmes

The creation of centres of excellence for nursing and residential care together with the creation of training opportunities for personnel involved in nursing and healthcare and medical and allied professions

The provision of employment opportunities for individuals with physical or other disabilities, the provision of rehabilitation assessment and training

The provision, construction, improvement or management for persons who are aged or infirm or disabled and therefore in need of housing

We deliver these objectives from four care homes located in Bishopton, Glasgow and Edinburgh. In addition, Erskine has 44 cottages for independent living on the Bishopton site, and intends during the period of this strategy to develop additional types of accommodation for both independent and assisted living.

This strategy explains how Erskine will achieve its Vision and develop and maintain quality services to fulfil its Mission over the forthcoming five years.

2.0 Our Vision

Our Vision for the future is **to be recognised as the leading ex-Service charity in Scotland**. We aim to achieve our Vision through the following strategic objectives:

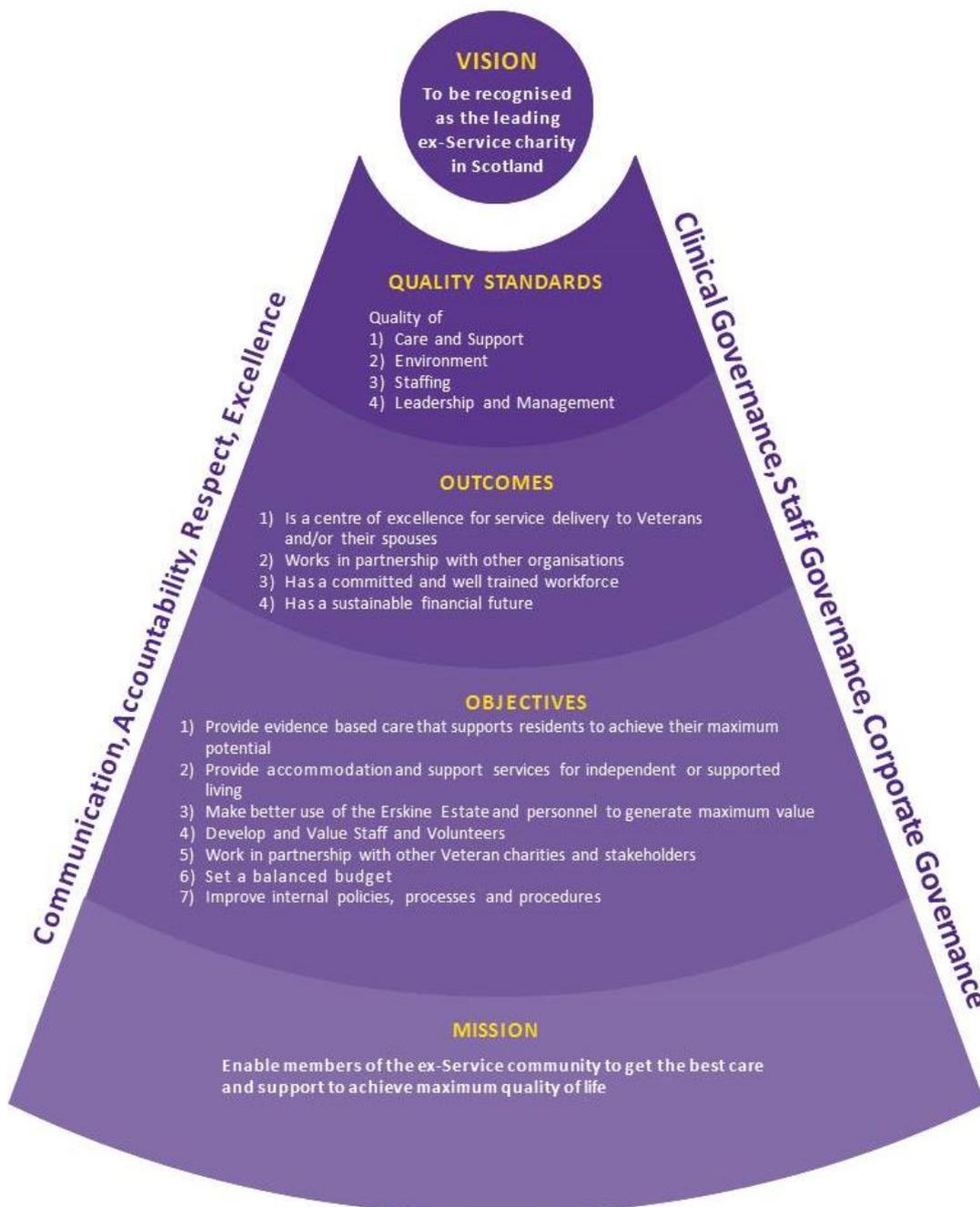
- Provide evidence based care that supports residents to achieve their maximum potential
- Provide accommodation and support services for independent or supported living
- Make better use of the Erskine Estate and personnel to generate maximum value
- Develop our staff and volunteers
- Work in partnerships with other veteran charities and stakeholders
- Set a balanced budget
- Improve internal policies, processes and procedures

The outcomes will be that Erskine

- Is a centre of excellence for service delivery to veterans and/or their spouses
- Works in partnership with other organisations
- Has a committed and well-trained workforce
- Has a sustainable financial future
- Has fit for purpose internal systems and processes

3.0 Strategy Map

The following schematic illustrates the relationship between the components of *the Erskine Strategy*:



4.0 Drivers for Change

The four main drivers for our strategy are:

Government Policy

One key element of the Government's policy 'Reshaping Care for Older People' is to deliver as much care as possible in the community to enable people to stay in their own homes or a homely setting for longer. The effect on Erskine is that our residents are frequently older and more frail when they apply to live with us, and as a consequence their care needs will be greater, although their length of stay may be shorter.

Demographics

The size of the UK ex-Service community is currently 6.2 million, of whom 530-545,000 reside in Scotland. The ex-Service community in Scotland living in private residential households is estimated to be 515,000 people, comprising: 260,000 veterans (51%) 170,000 adult dependants (33%) 85,000 dependent children below 16 years of age (16%). In addition there is an estimated 'hidden population' of 15,000 to 30,000 people living in communal establishments such as care homes.

The 430,000 members of the adult ex-Service community living in private residential households are predominantly elderly and much older than the general population. 64% of them are aged over 65 years (equivalent to 280,000 people). There is a 'spike' in the proportion aged 75-84 years, who make up a third of the ex-Service community; this age band includes post-war National Service veterans and their associated dependants. A further 14% are over 85 years old.

In recent years, the Scotland adult ex-Service community living in private residential households has reduced in size from 860,000 in 2005 to less than 430,000 in 2017. The community has also become increasingly elderly over this period: 22% were aged 75+ in 2005, rising to over 46% now. One of the impacts of there being so many veterans aged over 75 years is that they are more likely to live alone, which can lead to social isolation.

The adult ex-Service community in Scotland (including the 'hidden population' in communal establishments) is forecast by actuarial consultants Punter Southall to continue declining in size to around 275,000 by the year 2030, representing 6% of the Scottish adult population. This will have a significant effect on the demand for elderly care beds in our homes.

The main areas where veterans settle in Scotland are Glasgow, Edinburgh, Fife and Moray, although there are significant numbers settling throughout the Central belt and in the Highland area.

Care Standards and Inspections

Erskine is regulated by the Care Inspectorate which assesses the care we provide against four assessment areas: Quality of Care and Support, Quality of Environment, Quality of Staffing, and Quality of Management and Leadership. Inspections are unannounced and undertaken at least annually. They are

graded from 1 to 6 where 1 is Unsatisfactory and 6 is Excellent. Erskine strives to achieve a score of 5 (Very Good), or better. To ensure Erskine retains, and where necessary improves, its scores from these inspections we must focus on continuous quality improvement.

Economic Climate

It is forecast that the Scottish Government's budget will reduce in real terms by on average 6.8% per year during the term of this strategy. This will have an impact on the ability of local authorities to increase the statutory level of funding under the National Care Agreement, which is negotiated annually.

With the introduction of the Integration Joint Boards for health and social care provision in 2015/6, the National Care Contract is unlikely to remain the vehicle by which fee rates will be established, with each local authority able to determine its own rates through local commissioning. This may adversely affect the level of income from local authority funded residents.

The current economic climate means that our voluntary income will be harder to secure as families face increasing uncertainty over jobs and increasing pressures on their financial resources. Although we have seen some changes to the criteria used by Trusts and Foundations and a slight decline in individual giving, our voluntary income, particularly legacy income, has held up well. However, we cannot rely on this situation continuing so we will need to invest in our fundraising efforts to try to maintain the requisite levels of voluntary income. Similarly, we will have to ensure our reserves are well managed to ensure the maximum return on our investments.

5.0 Strengths and Opportunities

Erskine has a number of key strengths which it can use to support effective service delivery to veterans. These include:

- Highly motivated staff and volunteers who continue to provide a very high standard of care and support to our residents
- A very good reputation for the standards of care we deliver
- A strong brand identity, which supports fundraising
- Committed and experienced Trustees who are able to provide sound governance and advice.

We have opportunities to continue to improve the way we work by increasing the effectiveness of the services we deliver through partnership working and improving our internal administrative processes.

As the operating environment and the needs and expectations of our customers change we must play to our strengths and adapt our services to ensure we achieve our vision.

We need to ensure we support our workforce to retain and develop skills through organisational change due to current and potential changes in the services we provide. We need to be responsive to our customer and stakeholder expectations in terms of quality, effectiveness and value for money.

6.0 Strategic Objectives

We will achieve our Vision and outcomes through seven Strategic Objectives:

Strategic Objective 1 – Provide evidence based care that supports residents to achieve their maximum potential

Erskine currently has 339 en-suite rooms, 137 of which are allocated specifically for the care and support of people with dementia.

Dignity and respect will underpin the care provided for residents in Erskine Homes. Incremental quality improvements will ensure that practice is of the highest standard, resulting in grades of at least 5 'Very Good', as assessed by the Care Inspectorate.

We aim to promote the quality of life for all residents by supporting the delivery of relationship-centred care by appropriately trained staff who have the knowledge, skills and understanding of the needs of older people and the specific needs of people living with dementia. In doing this we will support residents to live in a community where they have a sense of security, belonging, purpose, achievement and significance.

We will:

- Continue to provide training for staff to ensure that they have the skills, knowledge and behaviours required by their role to support a personal outcomes, relationship centered approach to the planning and delivery of care in Erskine Homes
- Continue the programme of changes to ensure that all care is provided in an enabling and rehabilitative environment. This will include ensuring that design principles reflect the specific needs of people with visual, hearing, mobility and/or cognitive impairments, e.g. consideration of colour schemes and tonal contrasts, materials that reduce reverberation times and assistance with making houses easy for residents to navigate
- Regularly assess our performance through engagement with residents and relatives, including the use of feedback from formal satisfaction surveys
- Continuously review the demand for our services, making the necessary changes to ensure that we are providing services which best meet the current and predicted needs of members of the ex-Service community
- Invest in information technology to support the delivery of accurate care records and medicines administration

Strategic Objective 2 - Provide Accommodation and Support Services for independent or supported living

The future provision of accommodation by Erskine, whether on existing sites or elsewhere, and whether singly or in partnership with another organisation, should meet the needs of the ex-Service community. This accommodation could be provided in houses or flats with appropriate adaptations and access to services where necessary to support as independent a lifestyle as possible.

We will:

- Review the demand for accommodation annually to ensure Erskine is best placed to provide appropriate facilities which meet the current unmet need
- Provide housing for those who are able to live independently or who may require occasional support. This will be principally in cottage style housing on our Bishopton Estate, or by building new accommodation or extending or adapting existing facilities to create apartments
- Provide an Activity Centre for use by veterans in the local community to help address social isolation
- Regularly review the condition of our built estate to ensure it remains of the highest standard and informs our long-term budget planning process
- Support the MOD Personnel Recovery Centre by providing accommodation and support services for wounded, injured or sick Service personnel. This will be delivered from a dedicated wing in our Edinburgh Home

Strategic Objective 3 - Make better use of the Erskine Estate and personnel to generate maximum value

The Erskine Estate at Bishopton extends to some 35 Hectares (85 acres), of which more than half is under developed. On our other sites the buildings tend to occupy most of the land, but there may be under-utilised areas within the buildings.

Erskine offers some services which could be marketed to a wider customer base to achieve an income and without detriment to the original intended beneficiaries, e.g. catering, hairdressing, physiotherapy, podiatry.

We will:

- Develop an Estates Strategy which ensures our buildings and land are used in the most effective way possible and are maintained to the highest standards
- Identify, on a long-term basis, land we no longer require and consider its disposal
- Maintain protected environments surrounding the care homes and cottages
- Consider which services we could extend to a wider customer base as income generators
- Use appropriate spare capacity in our existing buildings to generate income

Strategic Objective 4 - Develop and Value Staff and Volunteers

The staff and volunteers who work for Erskine have a wide range of skills and experience, and are valued as our prime resource. To support their continued professional development, and to ensure they are appropriately trained for the work they undertake

We will:

- Undertake an organisational development programme to ensure we have a healthy internal culture. We will encourage everyone to live the Erskine values of:
Communication, Accountability, Respect, Excellence

- Engage with our staff through regular communications and undertake regular employee engagement surveys
- Roll out the Leadership Development Programme for Registered Nurses and Departmental Managers which will aim to develop and improve the skills, knowledge and behaviours in our leaders that will ensure everybody in the organisation is well led and effectively managed
- Provide personal development opportunities for all staff
- Promote attendance by providing a safe and healthy working environment, and supporting staff to return to work as soon as possible after a period of illness
- Promote employee relations through partnership working with the recognised Trades Unions, providing appropriate terms and conditions, policies and maintaining a fair job evaluation scheme based on equal pay
- Develop links with academia and other organisations to support relationship management and the development of our staff
- Maintain Investors in People and Investing in Volunteers accreditation
- Continue to develop work experience opportunities and a modern apprenticeship programme

Strategic Objective 5 – Work in partnership with other veterans' charities and stakeholders

Working with other organisations is key to the sustainable improvement and development of services for the ex-Service community. This will ensure charities are able to maximise the value of the voluntary income they receive, avoid duplication of services and deliver coordinated programmes of support and advice.

We will:

- Identify areas of un-met need, and where appropriate work with other veterans' charities to meet that need
- Support employment and work experience opportunities to ex-Service personnel by leasing our factory building to Royal British Legion Industries so they can establish 'Scotland's Bravest Manufacturing Company'
- Explore opportunities to work alongside and in partnership with other agencies that are part of the support network, e.g. Glasgow's Helping Heroes, Combat Stress, Shoulder to Shoulder, and invest in partnership models
- Be an active member of Veterans Scotland to support Scotland-wide initiatives which seek to deliver best practice and minimise the duplication of services for veterans
- Work in partnership with the other members of the Unforgotten Forces consortium of veterans' charities to maximise the benefits to veterans who are over the age of 65
- Support and assist academic institutions in research programmes of benefit to our residents

Strategic Objective 6 – Set a Balanced Budget

Erskine had an operating deficit, before voluntary and investment income had been included, of c£10.1m in the first year of this strategy, with one of the risks being a predicted reduction in voluntary income, particularly that gifted through legacies. To ensure sustainable service delivery and demonstrate value for

money, Erskine needs to ensure it continues to operate within a sustainable budget during the period of this strategy by being efficient and cost effective, as well as maximising opportunities for income generation described above.

We will:

- Identify efficiency savings each year to ensure we operate within our budget
- Continue to invest in fundraising activities to increase the number of individual donors and maximise charitable income
- Regularly review our investment strategy to maximise the return on our investments
- Review pay and non-pay costs annually to ensure they remain appropriate and do not increase without scrutiny
- Maintain appropriate staffing levels to reduce the need for agency staff whenever possible
- Use a Job Evaluation scheme and pay structure that rewards staff appropriately on the basis of equal pay
- Review procurement contracts with partners to ensure best value for money

Strategic Objective 7 – Improve internal policies, processes and procedures

Essential to our ability to continuously improve our services and demonstrate we deliver them efficiently and effectively, is to ensure we focus on our internal process and in particular quality and risk management.

We will:

- Instruct an annual internal audit programme based on a review of business processes, risk assessments and current audits
- Develop a comprehensive and structured Quality and Risk Management process appropriate to our activities and the risks inherent in these activities
- Regularly review our care, personnel and administrative policies and standards to ensure they reflect current legislation and best practice
- Develop a culture which encourages the reporting of hazards, events and safety concerns, with appropriate supporting processes

7.0 Implementation

Our strategy needs to be defined in advance but also be responsive to changes in our operating environment. Key to the success of implementing our strategy will be a robust, fit for purpose management and governance structure. We will review our Board, Committee and Operational Management structures to ensure they enable us to exercise strong leadership and accountability by clarifying lead responsibilities and reporting processes.

We will communicate the Strategy to our staff and stakeholders regularly and frequently to ensure it remains relevant and is used in our day to day business planning and prioritisation. Staff will also be engaged in future developments and reviews to further enhance understanding and commitment.

The Strategic Action Plan at Section 9 lays out our goals and defines who will be responsible, the timeframes and also the measures we will use to assess our success in achieving them.

8.0 Review

The strategy will be reviewed by the Executive Management Team (EMT) and Board of Trustees annually to ensure it remains aligned to the needs of the veteran community in Scotland.