

The Way Forward for AdvoCard 2018-2021



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Message from the Chair

For an organisation such as ours', AdvoCard is governed by a Board of Trustees. We work to create our strategy proposals, governance and finances, pooling the skills of the Board members, and overseen by the Managing Director of AdvoCard, Chris Mackie.

It is hoped that our Membership, Staff, colleagues and most importantly those, who use our service, will draw some concept of the caring and supportive Advocacy provision we aspire to.

And it is hoped that, over the next few years, these same strategies will be determined as successful, working achievements thereby enabling those who use our service to be heard independently and therefore empowered.

Together, we have drawn up the proposals and Mission Statement as stated in this document.

Dianna Manson
AdvoCard Chair
October 2018

Foreword

The following strategy document sets out to plan the way forward for AdvoCard over the next 3 years. While it has been informed by AdvoCard's history, current position and future aspirations, it is a live document which must sit in the context of reality and work within our current circumstances. Therefore it should not be seen as a static and rigid document, rather it will be something that will evolve as inevitably AdvoCard will.

The document was created by the Strategy Sub Group of the Board of Directors, over many hours of discussion and planning. It has been informed primarily by AdvoCard's Risk Register - as created and review by the Board of Directors - and the staff away day in October 2017, also taking into consideration financial restrictions and the current political landscape. It is also only half of the story and will sit alongside a Strategic Development Plan, which will map out the steps necessary to implement each strategic goal and follow the progress. This too will be driven by a sub group of the Board.

My thanks go to all the AdvoCard staff and volunteers who, through their dedication and commitment make a significant contribution to city wide mental health services, and whose voices on behalf of others, have been shown to significantly influence policy, locally and nationally. My thanks also go to all the other AdvoCard stakeholders, particularly our members and service users, the Board and the other forums which influence and are influenced by AdvoCard. While this document is specifically for AdvoCard, we also look forward to strengthening and developing our key partnerships with the Royal Edinburgh Hospital Patients Council and Edinburgh Carers Council.

I look forward to working with you to achieve the goals set out in this document.

Chris Mackie
Managing Director

Introduction

This document sets out a strategy for AdvoCard for the next 3 years from 2018. It has been informed and developed from several sources, most specifically:

- Discussions and planning from the strategy planning group
- The Staff Away Day (10th October 2017)
- The current risk register
- The renewal of a 3-year contract with City of Edinburgh Council/NHS Lothian (commencing 1 August 2017)

From many discussions and consultations, the following strategic aims were established:

- **Maintain and optimise quality**
- **Increase diversity of funding sources to remove dependency on any single source**
- **Increase targeting of those most isolated and vulnerable when possible**
- **Increase Stakeholder relations (including profile/branding/corporate communications)**
- **The wellbeing and development of Staff members**

These five key objectives are detailed further within this document.

Mission Statement

AdvoCard is an Edinburgh-wide advocacy project for adults who have experience of mental ill health. AdvoCard provides a free, independent and confidential service which helps people to make their voices heard.

The long-term aim is to work towards a community in which each individual's needs are met and where people have greater influence over the services they use.

Organisational Background

AdvoCard began offering an independent advocacy service in 1994 to people with mental health problems living in the north-east sector of Edinburgh with core funding from the Scottish Government and the City of Edinburgh Council. In 2000 funding was increased to extend the service to people living in the south-east sector of the City.

In 2001, funding was increased to extend the service to people living anywhere in the City of Edinburgh. Up until this point all advocacy was being delivered through trained volunteer advocacy workers.

In 2004 funding was again increased to develop capacity to be able to deal with the additional demands that would result from the Mental Health (Care and Treatment) (Scotland) Act 2003. A new service was introduced within AdvoCard, delivered through contracted advocacy workers, aimed at people who were subject to or facing compulsory treatment under the Act and at the same time offering advocacy support in connection with the safeguards in the Act. AdvoCard operated these two services successfully until November 2011, backed by a Service Level Agreement with the City of Edinburgh Council.

In 2009, AdvoCard successfully tendered for advocacy services at the Royal Edinburgh Hospital (REH). This included the management of the Individual Advocacy Service, and the hosting (or 'light-touch management') of the REH Patients Council. These two areas were backed by a service level agreement with NHS Lothian. Workers within these services transferred to AdvoCard's employment on 1 October 2009, increasing the staff complement from 10 to 19 people.

During the period 2009 to 2011, City of Edinburgh Council and NHS Lothian embarked upon an extensive review of independent advocacy services within the City. The review recommended that the numerous contracts, service level agreements and grants between the Council, NHS Lothian and advocacy providers be rationalised into three contracts, as follows:

- Mental health and carers
- Learning disability
- Physical disability and older people

This structure was put out to competitive tender, with AdvoCard (in collaboration with the Patients Council (PC) and Edinburgh Carers Council (ECC)) successfully securing the 'mental health and carers' contract. This contract commenced on 1 December 2011, and saw three staff transfer to AdvoCard from ECC, and one worker transfer from CAPS.

The competitive tender process resulted in both City of Edinburgh Council and NHS Lothian reducing their overall spend on advocacy in the city. NHS Lothian resolved to reinvest their savings in advocacy for prisoners and for people affected by the Westminster Government's Welfare Reform programme. AdvoCard successfully bid for funding to employ full time equivalent Advocacy Worker posts for both HMP Edinburgh and for Welfare Reform.

The contract with City of Edinburgh Council remained in place until 31 July 2017, when – following a further review and tender process – AdvoCard and partners (ECC and the REH PC) were awarded a further contract to provide independent advocacy services for people

with mental health support needs and unpaid carers. The contract commenced on 1 August 2017 and runs to 31 July 2020, with an option to extend until 31 July 2022.

Future Trends

The environment within which AdvoCard operates is affected significantly by the current economic climate and the UK Government's austerity programme. These have negatively impacted upon people using the organisation's services and has reduced opportunities to develop the organisation, through decreasing funding sources and increasing costs.

Present

At the time of writing, advocacy is prominent on the political agenda. This is due to the consultations and debates around the creation of a Social Security System for Scotland. AdvoCard and partner organisations are campaigning for the inclusion of a 'right to independent advocacy' within the new legislation.

Locally, the recently opened Royal Edinburgh Building, has required AdvoCard's individual advocacy service at the Royal Edinburgh Hospital to reconsider its approach to providing services there.

AdvoCard continues to work with local advocacy colleagues as part of the Lothian Independent Advocacy Providers Group (LIAPG) and with commissioners on the Lothian Advocacy Steering Group. These groups are focussed on the development and promotion of independent advocacy in the Lothians. A joint leaflet has been produced, a website established and an annual continuous professional development day now takes place. These two groups are of strategic importance, as gaps in advocacy provision are highlighted, as well as potential solutions to any issues.

Medium term

Over the course of AdvoCard's existence, demand for its various services has steadily grown. Due to economic and societal factors, it is anticipated that this trend will continue for the foreseeable future. However, income from statutory sources is decreasing. Therefore, AdvoCard must creatively address whether financial support can be accessed from other sources.

Longer term future

Further into the future, AdvoCard – no doubt – be impacted upon by the UK's exit from the European Union (aka 'Brexit'). At the time of writing the implications of this are unclear. However, it seems certain that Scotland's relationship with the rest of the UK will also change. Therefore, it is vital that the trustees and management of AdvoCard monitor these developments, and consider the impact upon service users, as well as the organisation itself.

Contingency Planning

There will be unpredictable events, for example the potential for cutbacks in funding or indeed an increase in the allocation of funds to allow further expansion. The need for flexibility, therefore, has to be recognised.

Strategic Direction - Overview

The focus for AdvoCard should remain on:

Edinburgh – Mental Health – Advocacy (Individual & Collective)

With continued uncertainty with CEC and NHS funding and the resulting restricted capacity to expand and develop our services, for now we will keep the status quo in terms of our service offerings. While we will not actively seek new work or areas of activity, we will continue keep AdvoCard well placed to be informed of or offered any pieces of work that may arise and which will be assessed as suitable or not on a case by case basis.

We will continue our representation on key forums from where new work would be likely to arise, e.g.:

- Lothian Independent Advocacy Steering Group
- Edinburgh Joint Mental Health & Wellbeing Partnership
- NHS Lothian Mental Health and Wellbeing Programme Board

We will continue to maintain and develop our key partnerships with:

- REH Patients Council
- Edinburgh Carers Council

The key strategic objectives

1. Maintain and optimise quality
2. Increase diversity of funding sources to remove dependency on any single source
3. Increase targeting of those most isolated and vulnerable when possible
4. Increase stakeholder relations (including profile/branding/corporate communications)
5. The wellbeing and development of staff members

Objective 1

Maintain and optimise quality

AdvoCard currently has an excellent reputation as a service provider, with a strong and committed workforce, management team, and Managing Director. While the current restrictive funding limits our expansion of community reach and services, it is essential that we maintain and optimise our good reputation.

To do this we will:

- Hold annual staff away days. One for the strategic development of Advocacy and one involving our key partners, the Carers Council and REH Patients Council.

- Solicit feedback from service users by:
 - Advocacy workers asking service users to complete feedback forms
 - Feedback forms at reception
 - A survey on the website (using survey monkey or similar)
 - Possible postal campaigns
- Develop volunteers on-line calendar to manage availability by using Google calendar or Doodle.
- Create a policy for boundaries and limitations

Objective 2

Increase diversity of funding sources to remove dependency on any single source

From this strategic objective, the following objectives are proposed:

- Research the possibilities of alternative funding sources.

It was felt that before we looked for additional external funding, there needed to be some research into the feasibility of this in line with the CEC/NHS funding we already receive and SIAA guidelines, before we even consider who we should be targeting.

- Once a year, we will run an event to raise funds (of around £1 – 3K) for a specific project. Possible projects include things like an office upgrade, new computers, staff training and rewards. Funding sources include lottery funding, corporate sponsorship, fundraising events.
- Make more use of the AGM as a fundraiser and profile raiser
- It was agreed that the AGM could be more of a 'showcase' and opportunity for raising funds through raffle ticket, cake stalls etc.
- Create an option to donate on the website, using Just Giving or similar.
- Have an option to gift through wills on the website.
- Put a donation box at reception for SMALL, anonymous donations
- Recruit an Event Planner/ Fundraiser/Researcher

Clearly all the above needs someone to organise and run, therefore it was agreed that we would look to find i) a current volunteer ii) advertise at the volunteer centre iii) find a student who could assist in this.

- Student Placements/interns

When appropriate, we will consider a student placement or internship to help advance the AdvoCard Strategy. After much discussion, it was felt that this would be more appropriate to ancillary activities (such as IT, web development and branding) rather than core advocacy work.

- There was also some discussion around the management of these volunteer roles and Chris Mackie (Managing Director) agreed that it would likely fall to him do this.

Objective 3

Increase targeting of those most isolated and vulnerable when possible

While there has been extensive discussion around our second strategic aim of “Increased targeting of those most isolated and vulnerable when possible”, there are so many groups we would be keen to target, especially in terms of age, postcode, minority groups, and collaborations with other groups, however we are mindful of our current resources which are at capacity (if not stretched) as it is, and simply cannot accommodate any expansion of services without specific funding allocation.

This has been left as a strategic objective with no actions to best reflect the real desire and commitment by everyone at AdvoCard to make a difference where we can.

Objective 4

Increase Stakeholder relations (including profile and communications)

The following objectives are proposed:

- Branding.
Develop new logo, leaflets, letterheads, website and social media presence. It was agreed the logo should be simple and easily visible (for those less well sighted).
- Referrers.
Identify who our key referrers are and how we can link to and build relationships with each of them. Also identify key events and places where we can continue to promote AdvoCard and the work we do.
- Key Decision Makers/Stakeholders.
Develop a plan for engaging with/informing/building relationships with key influencers such as: politicians, councillors, MSP’s, MP’s, and NHS, IJB and CEC Leaders.
- The 3 key stakeholders were identified as:
 - Internal: Staff, Volunteers & Board
 - Service Users: Both known to us and reaching new people

- Referrers and other Advocacy organisations
- Creating a video, short talks and leaflets were considered as a way of reaching out to our stakeholders. Ian Shaw was identified as someone who could potential help with creating a video. Testimonies would also be used.
- Other options for increasing stakeholder relations were identified as:
 - Benchmarking with other advocacy agencies
 - Liaising with referring agencies
 - Developing a group (community reps?) who could promote AdvoCard to referrers
 - Investing in known “pro” AdvoCard people

Objective 5

The wellbeing and development of Staff, Volunteers and Board members

The objectives for the wellbeing and development of staff was one of the key topics developed at the Staff Away day on 10th October 2017.

- Biannual Staff Away Days. As per Objective 1, two staff days will be held each year.
- Support for Staff

The following support mechanisms available for staff will continue:

- Monthly Support meetings
- Staff Peer Group Meetings (non-managers every 2nd month)
- One to one counselling sessions – with Wellspring or any other appropriate provider
- Therapeutic support groups
- Staff Training

Staff development and an annual training plan for all staff is a standing item as part of staff supervision and the annual appraisal process. Any additional training needs are assessed on an individual basis including:

 - An annual CPD event is held as per legislative requirements
 - A Professional Practice Award for Advocacy is currently being developed. AdvoCard may consider this as an option for the future for any staff who wish to be involved.
- Volunteers

The current volunteer training programme is considered to be highly successful and will remain unchanged. Any additional training required by volunteers either as a group or individually will be considered on a case by case basis.

- Board Members

A board membership induction programme to be developed and implemented.

Implementation

The implementation of this plan is essential to the future of AdvoCard and it is likely that the Board will appoint a strategy implementation sub group to take the lead in promoting the plan.

A larger print version of this plan is available upon request

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AdvoCard is striving to be an Equal Opportunities employer