

Life Changes Trust Quarterly Performance Report

January – March 2015

Contents

Introduction

Summary

Section A: Programmes

- People Affected by Dementia Programme
- Care Experienced Young People Programme

Section B: Communication, Public Relations and Influencing

Section C: Governance, Strategy, Performance and Risk Management

- Governance
- Business Strategy
- Finance
- People Management
- Operational Support
- Knowledge Management
- Performance Management and Evaluation

Introduction

January to March 2015 has been a very busy and productive time for the Trust, with significant progress on two of our major funding initiatives:

- Trustees confirmed funding awards for 14 exciting and innovative Dementia Friendly Community initiatives across Scotland.
- Trustees also agreed plans for a new funding call to be launched on 1 May for “Champions Boards” for care experienced young people across Scotland.

Good progress was also made with other funding developments for both our programmes, as highlighted in the summary below and in more detail in the full performance report.

Two new Trustees were appointed and Trustees approved appointment of Investec as the Trust’s Financial Investment Management provider. Trustees also approved our financial investment strategy with Investec.

Good progress was also achieved in developing the Trust’s performance management and programme evaluation arrangements, with the expectation that these will be finalised in the summer.

The Trust continued to engage with beneficiaries and stakeholders through our website, social media and events, developing our insight and relationships.

We expect our next quarter to be equally exciting and eventful!

Maddy Halliday, CEO
May 2015

Summary and Highlights

1. People Affected by Dementia Programme

1.1 Funding Awards: Complete or in progress

1.1.1 'Bright Ideas' initiative (open call across Scotland)

The Trust launched its first annual 'Bright Ideas' scheme on 19th March 2015. Any organisation or individual with an innovative idea which would help create a better life for people affected by dementia can apply. The closing date is 19th June 2015.

Funding: £90,000 (1st prize - £50,000; 2nd prize - £25,000; 3rd prize - £15,000).

The award money must be spent on the project proposed and organisations/individuals will be subject to the same due diligence/monitoring and evaluation as any other Trust-funded project.

1.1.2 Befriending and peer support initiative (open call across Scotland)

This funding will support the development of befriending and peer support initiatives in Scotland. The scheme closes to applicants on 2nd April 2015.

Funding: £1,212,500 over 5 years.

1.1.3 Dementia Friendly Communities (open call across Scotland)

The aim of this initiative is to facilitate the development of dementia friendly communities across Scotland which support people affected by dementia to live well and be included in their local and wider community. Trustees approved funding for 14 initiatives in December 2014. Funding has now been confirmed following due diligence checks, and announcements of successful awards have been made.

Funding: £3,386,187 over three years.

1.1.4 Scottish Social Attitudes Survey 2014 – Attitudes to Dementia

This survey was carried out by ScotCen between May and August 2014. The final report will be available in May 2015 and findings launched in June 2015. This was jointly funded by the Joseph Rowntree Foundation and the Trust.

Funding: £60,000

1.1.5 Conference Bursaries: 24th Alzheimer Europe Conference, October 2014 (open call across Scotland)

The Trust provided 70 bursaries which enabled many more people with dementia and their carers to attend and participate in the Alzheimer Europe Conference than would otherwise have been possible.

Feedback from bursary holders was very positive and a short evaluation report was published on the Trust's website in January 2015.

Funding: £35,000

1.1.6 Individual Awards Pilot for People Affected by Dementia (open call in pilot areas)

This pilot was delivered in Argyll & Bute and Edinburgh, with the support of several partner organisations including RVS and local carers' groups. It aimed to help people affected by dementia to do something that would make a difference to their quality of life. The pilot is now being evaluated and a full report will be available in August 2015. 416 awards were made.

Funding: £250,065

1.2 Funding Initiatives: Approved

1.2.1 Values, Ethics and Rights in Dementia Network (VERDe Network)

This is a venture that is jointly funded with the Joseph Rowntree Foundation. It will establish a UK-wide network of individuals and organisations committed to achieving changes in thinking and a rights-based approach to policy and practice concerning values, rights and ethics for people living with dementia. People living with dementia will be actively involved.

Funding: £27,720 over 18 months

1.2.2 Age Scotland – early dementia awareness raising and intervention amongst older people in Scotland.

This funding will enable Age Scotland and its 849 member groups become dementia friendly. The organisation will:

- increase awareness of how healthy living can prevent or delay the onset of some types of dementia
- increase awareness of healthy living and positive opportunities for people with early stage dementia to improve quality of life
- encourage people to seek early diagnosis and promote early intervention
- promote awareness of the equalities issues and human rights of people who have early-stage dementia
- use evidence from engagement with older people to influence the Scottish Government and other policy makers and service providers

Funding: £515,087 over three years

1.2.3 Scottish Dementia Working Group – transport sub-group DVD and online resource.

The Transport sub group of the Scottish Dementia Working Group (SDWG) will produce a DVD and online resource to raise awareness of some of the issues people with dementia may have when using public transport and to provide some tips and hints on what public transport agencies could do to help.

Funding: £7,000

2. Care Experienced Young People Programme

2.1 Funding Awards Complete or in progress

2.1.1 Who Cares? Scotland: Engagement and Empowerment of Care Experienced Young People – continuing funding (Targeted award)

Informed by evaluation of their development funding from the Trust in 2014, WCS were invited to submit a continuing funding proposal to the Trust in October 2014. This was assessed and then approved by Trustees in November 2014.

This continuing funding will allow Who Cares? Scotland to work with young people and others to:

- improve care experienced young people's life chances, quality of life and well being
- reduce stigma and create a positive care identity

This will be achieved through a range of engagement, empowerment and influencing activities.

Award Amount: £1,232,243 over 4 years

2.2 Funding Awards: Approved

2.2.1 Peer Mentoring Open Call (across Scotland)

To invest in an initial phase of peer mentoring projects for Care Experienced Young People, which will provide support to recipients while assessing benefits of this approach. The scheme will open to applicants on the 1st April 2015 and the closing date is 13th May 2015.

Total funding to be allocated: £500,000 across two years

2.2.2 Champions Boards Open Call (across Scotland)

To invest in and support the development of Champions Boards across Scotland, to enable systemic, transformational and sustainable improvements to the support provided to care experienced young people over time, improving their quality of life and wellbeing. The application process will be open from May 2015 to October 2015.

Funding: £7,500,000 over 8 years

3. Cross Programme Funding Initiatives

3.1 Funding Initiatives in Progress

Corporate Social Venturing

This project aims to support transformational and sustainable improvements in the quality of life and well-being of care experienced young people and people affected by dementia using targeted, loan investment to organisations which provide employment, social and other support.

Funding Approach:

Open call.

Award Type: Loan

The loan funding will be underwritten by the Trust. Loan issue and management will be undertaken through Big Issue Invest, which is registered to manage social loans.

Start and End Date:

Launches end May/early June 2015, runs until 2019.

Partners:

Investment and Support Partners: Life Changes Trust; Big Issue Invest; Scottish Council for Development and Industry; Mitie; Places for People Scotland Care & Support; and PricewaterhouseCoopers.

Award Amount

Upper limit of £50,000 per applicant; £500,000 = total amount to be awarded

Background

The Initiative will:

- find and support, through loan finance and mentoring, up to 10 viable social ventures in Scotland to help them develop financially sustainable solutions to delivering improved outcomes to the Trust's beneficiary groups
- support funded ventures to undertake effective evaluation
- share learning to guide improved practice more widely

Big Issue Invest (BII) is a leading UK social investment intermediary organisation and has pioneered CSV in England. This partnership will bring CSV into Scotland for the first time. CSV is a pioneering model for investing in and growing early stage ventures committed to creating social impact.

4. Trust Profile and Reach

4.1 Website

Between January and March 2015:

- web sessions increased 9% on the previous three month period (4397 web sessions increasing to 4799 web sessions)
- around 59% of people who used the Trust's website were new visitors
- planning for our new Trust website was completed and design work commenced

4.2 Digital

At the end of December 2014, 856 people subscribed to the Trust e-bulletin. At the end of March 2015, this number had increased to 913, an increase of 7% over three months. At the end of December 2014, the Trust had 734 followers on Twitter. By end of March 2015, this number was 870, an increase of 18% over three months.

4.3 Publications

- In January 2015, we published our full and summary versions of our Business Strategy for 2014-23 on-line, with hard copies of the summary version.
- Corresponding online and printed versions of both programme strategy summaries were finalised and designed by the end of March, ready for print.
- An evaluation report for our Care Experienced Young People's Individual Awards pilot was designed in-house, ready for publication in full and summary formats on our website.

4.4 Events

- We held two programme-specific stakeholder focus groups in February 2015 to inform the development of our new website.
- We held three consultation workshops for our People Affected by Dementia Programme.
- We had stalls at The Gathering 2015, and Holyrood's Older Person's Conference.

5. Governance, Management and Operations

The Trust's approved Business Plan for 2014-2023 was published in January 2015, which includes our high level Corporate Strategy and two Programme Strategies. All of the Trust's work is framed by our Business Plan, with delivery supported by more detailed work plans and assessment of progress by our performance management and programme evaluation arrangements.

During January-March 2015, Trustees, CEO and Programme Directors continued to work together to provide effective governance and leadership of the Trust, supporting planning and decision making through our quarterly cycle of committees and Board meetings.

Our March Board was particularly busy, approving the appointment of two new Trustees, the appointment of Investec as our Financial Investment provider and our 3 year rolling Programme Work Plans for 2015-18.

Trust staff reviewed our funding management manual in February 2015, which will continue to be developed and improved to support good practice in all aspects of funding management.

Section A – Programmes

A.1 People Affected by Dementia Programme

A.1.1 Completed Funding Initiatives

A.1.1.1 Title of Funding Initiative: Bursaries for 24th Alzheimer Europe Conference, October 2014

Aim

To enable people with dementia and carers to attend a significant dementia conference which they would normally be unable to attend.

Intended Outcomes

- People affected by dementia attend the conference and can meet with and learn from others with similar experiences.
- People affected by dementia are at the heart of discussions about matters which directly affect them and the way they live their lives.
- The conference is positively affected by the presence of people living with dementia and carers and the contributions they make at the conference.
- An example is set which may encourage those who organise conferences and other events to consider how people with dementia and carers can be helped to attend and to have their voices heard.

Funding Approach: Open Call

Start and End Date: July 2014 – October 2014

Fundees: 70 individuals

Partners: Alzheimer Scotland and Alzheimer Europe (administered awards)

Award Amount: £500 to 50 individuals from Scotland; £750 to 10 individuals from Europe; £250 to 10 frontline workers from Scotland.

Links to Trust Programme Strategy

Priority/ies: Priority 5 – specifically, “ensure that people affected by dementia have voices that are heard by the public, communities and professionals”.

Links to Trust Programme Outcomes

More people affected by dementia can say:

- I am empowered to do the things that are important to me

Summary of Activity

The Trust provided 70 bursaries which enabled people with dementia and their carers from Scotland to attend the Alzheimer Europe Conference in Glasgow in October 2014 (bursaries were also provided to a few frontline workers who otherwise would not have been able to attend.)

Evaluation

Methods

- Guided letter returned to Programme Team
- Verbal feedback at conference recorded
- Conference report produced and shared publicly and with key organisations

Findings/Results

Feedback from bursary holders was very positive and we believe fulfilled intended outcomes. A report is available on the Trust's website.

Next Steps

- Trustees have decided to fund bursaries at the Alzheimer Scotland Conference (June 2015) and the next Alzheimer Europe Conference (Slovenia – September 2015). The Programme Director is speaking with Alzheimer Scotland about how to best deliver these bursaries.
- The Trust will also seek to influence others, to encourage them to provide this type of support in future
- The Trust will review any longer term role in 2016.

A.1.2 Active Funding Initiatives

A.1.2.1 Title of Funding Initiative: Scottish Social Attitudes Survey – Attitudes to Dementia

Aims

- Explore knowledge, understanding and awareness of dementia and; personal experience of dementia; perceptions of people with dementia and their carers; attitudes to who should provide care and how the care is funded for people with dementia; dementia friendly communities and where people would go for help and support.
- Examine the differences in attitudes to dementia by various groups of people in Scotland by exploring: socio-demographic factors; whether someone knows someone with dementia; whether they have cared for someone with dementia and how much knowledge they have about dementia.

Intended Outcomes

- The Trust and others gain a better understanding of how the Scottish public views people with dementia and their carers and the help and support they need.
- The Trust and others gain a better understanding of what the Scottish public understands about dementia and where they go for information.
- This information can be used to better target and provide information and advice about dementia, build on positive attitudes and challenge negative ones.

Funding Approach: Targeted and Collaborative

Start and End Date: February 2014 – September 2015

Fundee: National Centre for Social Research (delivered by ScotCen)

Partners: Joseph Rowntree Foundation (JRF) as joint funder

Award Amount: £60,000

Links to Trust Programme Strategy

Priority/ies: Priority 4 – specifically, develop a clearer understanding of public attitudes among Scottish people towards those with dementia and their carers and promote positive attitudes and understanding about dementia.

Links to Trust Programme Outcomes

More people affected by dementia can say:

- I feel safe, listened to, valued and respected

Activity to Date

- Survey questions were developed in collaboration with the Trust and JRF and tested before being finalised.
- The survey was undertaken during spring-summer 2014 by the Scottish Centre for Social Research as part of the National Household Survey.
- A summary of findings were provided to the Trust and JRF in November 2014 and the full report will be available in May 2015, with findings launched in June 2015.

Evaluation: N/A

Next Steps

- The report will be published online in full and summary formats and will be launched in June 2015, as June coincides with the Alzheimer Scotland Conference (Glasgow) and the Prime Minister's Dementia Challenge Conference (London).
- A roundtable meeting will be held with other key organisations to secure their collaboration in promoting findings and key messages arising from the research and to identify any other activities (date tbc).
- Findings will inform planning of future funding priorities in this area for the Trust.

A.1.2.2 Title of Funding Initiative: Dementia Friendly Communities (first phase)

Aims:

- To improve the quality of life and well-being of those whose lives are affected by dementia – both people with dementia and carers.
- To support more rapid and effective development of Dementia Friendly Community projects and practices across Scotland so that:
 - people will be aware of, and understand more about, dementia
 - those whose lives are affected by dementia will seek and find the help and support they need
 - people affected by dementia are included in their community, enabled to be more independent and can exercise more choice and control
- To share findings and learning from Dementia Friendly Communities funded by the Trust in order to improve Dementia Friendly practice across Scotland and so that others can learn from Scotland.
- To support the development of positive relationships, mentoring and learning between Dementia Friendly Communities in Scotland, and also between Dementia Friendly Communities and similar initiatives that support the empowerment of those affected by dementia.
- To identify the longer-term support needs of communities in Scotland that are aiming to be dementia friendly in order to inform the planning of a second phase of Trust funding, which will further help to consolidate and develop the impact, reach and benefits of dementia friendly initiatives.

Intended Outcomes

People affected by dementia (including carers) can say:

- I have a significant say in how my dementia friendly community is run
- I know I have a community of support around me
- I am included and empowered
- I feel safe, listened to, valued and respected

Dementia Friendly Communities as a whole can say:

- There is a significant improvement in the skill, capacity and commitment we have to develop, deliver and evaluate an ongoing and effective Dementia Friendly Community.
- We are clear about the resources we need to make our Dementia Friendly Community sustainable and resilient beyond the Trust-funded stage and we are actively seeking ways of becoming sustainable.
- We have strong and effective links with other Dementia Friendly Communities so that we can support and learn from each other.
- We have effective links to other initiatives, for example other third sector or public sector agencies, that support and empower those whose lives are affected by dementia.

Funding Approach: Open Call

Start and End Date: August 2014 to April 2018

Fundees: various, see below

Partners: N/A

Award Amount: £3,386,187 over three years

Links to Trust Programme Strategy

Priority/ies: Priority 1 – specifically, to facilitate development of dementia friendly communities across Scotland that support people affected by dementia to live well in the place they choose, and be included in their local and wider community. This will include support for a Scottish national learning and improvement community to enable all dementia friendly communities to learn from each other, improve practice and mentor new initiatives.

Links to Trust Programme Outcomes:

More people affected by dementia can say:

- I live in a place that suits me and my needs
- I am able to be as independent as possible
- I get the help I need when I need it
- I feel safe, listened to, valued and respected
- I am empowered to do the things that are important to me

Activity to Date

- The Trust launched a first open call for applications for funding for dementia friendly communities (DFCs) in August 2014, with a closing date of 24 October 2014.
- 72 applications were received and assessed.
- In December 2014, Trustees approved funding for 14 initiatives, which represent a diverse range of activities and organisations across Scotland. Announcements were made in February/March 2015 and promoted through our website, digital and print media. Full details of all the funded projects are available on our website, and are as below:

Aberdeen FC Community Trust, Award: £82,050

A local sports organisation which will become a dementia friendly health and well-being community which aims to promote good health, inclusion and learning. The project primarily aims to build upon the charity's provision of exercise programmes involving indoor activities and outside activities in public green spaces. However, the project also plans to raise awareness of dementia within the wider community and provide respite opportunities.

an Lanntair, Award: £180,530

A bilingual dementia friendly community which aims to use the community's local language, knowledge, people and memory tools to support people affected by dementia in a culturally specific way. One to one sessions and a mobile community venue will also be used to directly engage people affected by dementia living within the rural areas of the community.

Dementia Friendly Community Helmsdale CIC, Award: £215,000

A rural dementia friendly community initiative which requires funding to make itself self-sustaining. This DFC Initiative is informed by people affected by dementia and works in partnership with a range of businesses, service providers, voluntary groups, community organisations and individuals. Existing online resources, including virtual meeting places, will be used to give people affected by dementia the opportunity to share experiences and access support. This DFC initiative also plans to complement its work by increasing its use of digital technology, establishing a working kitchen and setting up a community online shop to raise funds to help sustain itself.

Centrestage Communities Ltd, Award: £337,500

An inter-generational dementia friendly music community which aims to bring people affected by dementia together for social gatherings involving music, dance and performances. The project aims to facilitate conversations and connections through musical themed memory activities. The project also plans to create cross generational and community networks to reduce the stigma and isolation experienced by people affected by dementia.

Crossreach 'Heart for Art' project, Award: £227,816

A multi-site dementia friendly arts community enabling people affected by dementia to express themselves, to learn new skills, build their confidence and improve personal relationships through creative arts.

The project is based on a successful pilot project which also raises awareness and tackles stigma within the local community. In addition to this, the project provides information and support to members and the wider community.

Deaf Connections, Award: £384,800

A national dementia friendly community for deaf people and their carers. The project aims to raise awareness within the deaf community about dementia and improve existing projects and activities. The project also plans to provide a befriending service, volunteering opportunities, skilled staff and a BSL-translated accessible website.

Dementia Friendly West Dunbartonshire Partnership, Award: £139,563

A regional dementia friendly community which aims to support, empower and involve people affected by dementia across a wide regional area containing isolated rural communities. This DFC initiative plans to deliver a programme of localised awareness training, pledge sessions and follow-up, recruitment of local Champions and dementia friendly status accreditation for organisations and businesses. This DFC initiative also plans to provide the means for networking to help encourage champions across neighbourhoods to share experiences and support each other.

DFC Dumfries and Galloway, Award: £423,478

A smaller rural dementia friendly community initiative which aims to support, empower and involve people affected by dementia across a wide regional area containing isolated rural communities. Activities will include: developing local dementia friends and champions who will bring businesses, organisations and local people together to create transformational change; using the integration of health and social care to provide a greater focus on locality working; introducing a dementia-friendly community reference group consisting of people affected by dementia as well as representatives from schools, businesses and local service providers; developing a toolkit and benchmark of excellence.

Dumbarton Dementia Café and Allotment Group, Award: £52,943

A dementia friendly gardening community which allows people affected by dementia to come together to enjoy an activity that means something to them and enjoy being outdoors, and also to grow their own produce in an allotment which is then sold at coffee mornings and various dementia support groups.

Festival and King's Theatres, Award: £321,006

A dementia friendly theatres initiative. This initiative aims to make two theatres in Edinburgh more dementia friendly by changing building environments, adapting theatre programmes, providing training to personnel and recruiting dementia champions. Preparatory music workshops will also take place in care homes and practical information given to those who are planning on visiting the theatre. They want to be an exemplar for other theatres and similar venues.

Kirriemuir and Dean Area Partnership, Award: £269,000

A small, rural DFC initiative which aims to raise awareness, change attitudes and promote inclusion throughout the community. They will: develop a sensory/dementia community garden; conduct awareness raising sessions which challenge prejudices by highlighting what people with dementia can still do; deliver training and support to local businesses, community groups, schools, youth groups and all public sector organisations; increase the use of technology and information; introduce dementia friendly changes (e.g. signposting) to the town centre.

North Berwick Day Care Association Ltd, Award: £5,232

A dementia friendly choir which enables people affected by dementia to sing and socialise within a familiar group of like-minded people. Already, the choir has successfully performed at a variety of external events in respite care centres, local nursing homes and community tea dances. Choir members have enjoyed a boost to their morale and self-confidence as a result of attending this choir group.

Paths for All, Award: £299,379

A national dementia friendly walking community which aims to enable people affected by dementia to access walking opportunities and enhance their experience of walking. Activities will include: training volunteer walk leaders in dementia awareness; delivering education/awareness raising with existing walkers; introducing a buddy walking programme where appropriate to allow carers respite; producing resources which promote the benefits of walking for those affected by dementia.

Sporting Memories Network (Scotland) CIC, Award: £447,890

A national dementia friendly sports network, delivering 55 dementia friendly sports venues across Scotland. This network will include reminiscence based on sport as well as education programmes, fitness programmes and opportunities for outings and experiences together.

Evaluation**Methods**

- To be decided with each individual community in line with the Trust's evaluation framework and the outcomes specified in the Background Paper that accompanied the application form.
- An evaluation guidance document has been prepared and will be given to each DFC at the first all-DFC event on 6 May 2015. It will also be published on the Trust's website. Ongoing evaluation support arrangements for all DFCs is also being put in place.

Next Steps

Due diligence is complete and Award Letters have been issued. First Award payments will be made in May.

A.1.2.3 Individual Awards Pilot for People Affected by Dementia

Aim

To enable people affected by dementia to do something that matters to them and which will make a difference to their quality of life.

Intended Outcomes

- Individuals are empowered with a sum of money to choose something that will have direct benefit to them.
- There may be a longer term effect in that a need is revealed that can be met in the longer term.
- Individuals may take more deliberate steps to ensure that they can continue doing the thing that matters to them, e.g. seek financial support from a local authority to visit a relative who has been placed in a care home far away from family.
- Partner organisations delivering the pilots understand more about what their service users may need to improve their quality of life and well-being.

Type of Award: Open Call in two specified regions – Edinburgh and Argyll & Bute

Start and End Date: 1 October 2014 to 31 July 2015 (Awards application period – 1 October 2014 – 15 January 2015)

Fundees: 416

Partners:

- Royal Voluntary Service (lead partner)
- The Dochas Centre
- Helensburgh & Lomond Carers SCIO
- North Argyll Carers Centre
- Crossroads Caring for Carers (Cowal & Bute)
- VOCAL
- Life Care Edinburgh Ltd
- Minority Ethnic Carers of Older People Project (MECOPP)

Award Amount: £250,065 (£200,101 on awards; £49,964 on partner costs)

Links to Trust Programme Strategy

Priority/ies: Priority 5 – specifically, resource people affected by dementia to help them meet their identified needs in a way of their choosing and within their control by empowering them financially.

Links to Trust Programme Outcomes

More people affected by dementia can say:

- I am empowered to do the things that are important to me

Activity to Date

- The Trust launched its main pilot for individual awards for people affected by dementia in October 2014 in two areas - Argyll & Bute and Edinburgh. This pilot was delivered through several local community organisations and the Royal Voluntary Service (RVS).
- The funding stage of the pilot concluded in January 2015 and 416 individuals received an Award:
- An extension to the main pilot in Edinburgh for Minority Ethnic Carers also commenced in October 2014. This was run by the Minority Ethnic Carers of People Project (MECOPP).

Evaluation

Methods

- All Awardees will be invited to complete and return a guided letter to the Trust explaining how they used the Award and what benefit it brought in both the short and longer terms. This will be analysed by the Programme Team.
- A selection of Awardees will be chosen for more in-depth feedback through individual interview or group interviews, e.g. through tea parties or face to face meetings. The Programme Team will lead this work.
- In addition, a large number of equality monitoring forms are being analysed by the Programme Officer.

Findings/Results

A final report, including the evaluation report with recommendations for future funding will be presented to the Programme Committee at the August 2015 Committee meeting.

Next Steps

- Evaluation will be carried out between January 2015 and May 2015
- Final report will be available in August 2015
- Findings will inform:
 - planning of future funding ideas in this area for the Trust, which may include collaboration with other funders
 - PR and influencing activities by the Trust on this issue

A.1.2.4 Befriending and peer support

Aims

- To fund befriending and peer support services that people with dementia and carers say they greatly value.
- To support selected organisations providing such services which do not have statutory funding.
- To build a more robust (less anecdotal) evidence base of the long term benefits of befriending and peer support.
- To link such services into the Community of Practice and Learning that will develop from the Trust-funded Dementia Friendly Communities across Scotland.

Intended Outcomes:

Those who benefit from befriending initiatives can say:

- I know that I have someone who will listen to me and understand me
- I feel less lonely and more positive about life
- I have an increased sense of well-being
- I feel safe, valued and respected
- I have more confidence to do the things that matter to me
- I can give examples of how befriending has made a difference to my life

Those who benefit from peer support initiatives can say:

- I know that I have someone who will listen to me and who understands my situation
- I know that I have support to face the challenges in my life
- I have an increased sense of well-being
- I feel safe, valued and respected
- I have more confidence to make choices and do the things that matter to me
- I can give examples of how peer support has made a difference to my life

Funding Approach: Open call

Start and End Date: January 2015 – June 2020 (Awards made from June 2015)

Fundees: t.b.c.

Partners: none as yet, but match funding will be required from year 3 and this will introduce partners to the scheme

Award Amount: £1,212,500 over 5 years (match funding required in years 3 to 5)

Links to Trust Programme Strategy

Priority/ies: Priority 5 – “Empower people affected by dementia so that they can do the things that are important to them”, specifically, “Increase and improve the personal support available to people affected by dementia, for example, through peer support, befriending, independent advocacy and mentoring”.

Links to Trust Programme Outcomes

More people affected by dementia can say:

- I feel safe, listened to, valued and respected
- I am empowered to do the things that are important to me

Evaluation: Successful applicants will be given initiative-specific evaluation guidance and evaluation support, linked to the Trust’s evaluation framework.

Next Steps:

- Applications close on 2 April 2015 and will then be assessed.
- Recommendations to Programme Committee on 8 May 2015.
- Applicants informed of outcome by 22 May.
- Due diligence checks, Award Letters and funding released (by July 2015).

A.1.2.5 'Bright Ideas' initiative (open call across Scotland)**Aims**

The purpose of the 'Bright Ideas' Annual Open Call is to give people an opportunity to bring forward ideas and innovations for the Trust to consider funding. This open call is particularly suitable for those initiatives that do not readily fit other funding streams and which people with dementia and/or carers say would bring real benefit to them.

Intended Outcomes

The Bright Idea must lead to one of the five outcomes listed in the Trust's People Affected by Dementia Strategy:

- I live in a place that suits me and my needs
- I am able to be as independent as possible
- I get the help I need when I need it
- I feel safe, listened to, valued and respected
- I am empowered to do the things that are important to me

Funding Approach: Open call

Start and End Date: 19 March 2015 – November 2016 (assuming each prize winner takes one year to use their award. This may carry on for longer - timescales will be agreed with winners prior to the award being made).

Fundees: t.b.c.

Partners: N/A

Award Amount: £90,000 plus £10,000 for filming video clips and Awards Ceremony. (1st prize - £50,000; 2nd prize - £25,000; 3rd prize - £15,000. These awards must be spent on the project proposed and organisations/individuals will be subject to the same due diligence/monitoring and evaluation as any other Trust-funded project.)

Links to Trust Programme Strategy as follows:

Priority/ies: Priority 2 "Protect and promote the independence of people affected by dementia", specifically, "Discover innovations and ways of working that contribute to the independence of people affected by dementia."

Links to Trust Programme Outcomes:

More people affected by dementia can say:

- I live in a place that suits me and my needs
- I am able to be as independent as possible
- I get the help I need when I need it
- I feel safe, listened to, valued and respected
- I am empowered to do the things that are important to me

Evaluation: Successful applicants will be given initiative-specific evaluation guidance and evaluation support, linked to the Trust's evaluation framework.

Next Steps:

- Funding call opened on 19th March 2015. The closing date is 19th June 2015.
- Applications will be shortlisted to 6 and then each applicant will be supported to make an online video (2 mins) to explain and promote their initiative (July – August 2015).
- People with dementia and carers will vote on which initiative is most likely to create a better life for them (October 2015).
- Trustees will approve the final winners, based on votes and subject to due diligence checks being carried out (November 2015)
- Awards Ceremony – late November 2015.

A.1.3 New, Approved Funding Initiatives

A.1.3.1 Values, Ethics and Rights in Dementia Network (VERDe Network)

Aims

To embed different thinking and a rights-based approach in policy and practice for people living with dementia.

Intended Outputs and Outcomes

- A series of six forum meetings for the network taking place over 18 months, based on work generated by the Joseph Rowntree Foundation's Dementia Without Walls (DWW) programme, attended by members of the DWW programme and other key influencers, policy makers and community activists
- A UK-wide network of individuals and organisations committed to achieving change in thinking and a rights-based approach to policy and practice concerning rights and ethics for people living with dementia.

Funding Approach: Targeted and collaborative

Start and End Date: July 2015 – December 2016

Fundee: Mental Health Foundation

Partners: Joseph Rowntree Foundation

Award Amount: £27,720 over 18 months

Links to Trust Programme Strategy

Priority/ies: Priority 4 "Create a culture in Scotland where people affected by dementia feel safe, listened to, valued and respected", specifically "Enhance understanding about the human rights of people affected by dementia and demonstrate how these rights should be practically applied by public services and others who provide services to people with dementia".

Links to Trust Programme Outcomes:

More people affected by dementia can say:

- I feel safe, listened to, valued and respected

Evaluation: t.b.c. with JRF

Next Steps

- Award letter to be issued to Mental Health Foundation

A.1.3.2 Age Scotland – early dementia awareness raising and intervention amongst older people in Scotland

Aims

- Increased awareness of how healthy living can prevent or delay the onset of some types of dementia.
- Increased awareness of healthy living and positive opportunities for people with early stage dementia to improve quality of life.
- Older people seek early diagnosis and promote early intervention.
- Greater awareness of the equalities issues and human rights of people who have early-stage dementia.
- Evidence from engagement with older people used to influence the Scottish Government and other policy makers and service providers.

Intended Outcomes:

Outcomes for older people with dementia and their carers

More older people with dementia will have diagnosis and treatment at an early stage of their condition so they will have better lives and:

- A longer period of independence
- Access to information and resources based on the needs and experiences of their peers
- Greater awareness of the help, entitlements and choices which are available to themselves and their carers
- Time and opportunity to take steps to protect their individual choices in future (Power of Attorney, wills, where they will live, who will support them)
- Interaction with services which will have a better awareness of their needs and priorities
- Knowledge that the issues they identify will be raised with policy makers
- Access to advice and appropriate signposts and referrals for specialist support at diagnosis and as their needs change
- Avoiding crisis situations by managing their condition and planning for the future

Outcomes for older people:

- More older people will understand the causes of dementia and how their risk of developing dementia might be reduced.
- More older people will understand the early signs of possible dementia and seek help early.
- More older people and their carers will have a better understanding of the issues and needs of people with early-stage dementia, and the stigma and fear will be reduced.
- More Age Scotland member groups would be equipped to support older people with early-stage dementia and their carers to participate in activities they enjoy.

Outcomes for policy-makers and service providers

- Evidence of the issues and concerns identified will be provided to service providers and policy makers to influence and improve their planning and priorities so that people with early-stage dementia will have better lives (housing, environment, care services, communication).

Outcomes for Age Scotland

- Age Scotland staff and the member groups they support will have better awareness of early stage dementia and provide better services.
- Age Scotland's influencing work and information resources across all issues will include the needs and priorities of people who have early-stage dementia.

Funding Approach: Targeted

Start and End Date: May 2015 – April 2018

Fundees: Age Scotland

Partners: N/A

Award Amount: £515,087 over three years

Links to Trust Programme Strategy

Priority/ies: Priority 2 "Protect and promote the independence of people affected by dementia", specifically, "Promote early diagnosis and early intervention".

Links to Trust Programme Outcomes:

More people affected by dementia can say:

- I am able to be as independent as possible
- I get the help I need when I need it

Evaluation: an evaluation plan is being prepared with Age Scotland in line with the Trust's evaluation framework.

Next Steps

Award letter has been issued and first payment of funds will be released in May 2015.

A.1.3.3 Scottish Dementia Working Group – transport sub-group DVD and online resource.

Aims

To produce a DVD and online resource to raise awareness of some of the issues people with dementia may have when using public transport and to provide some tips and hints on what public transport agencies could do to help.

Intended Outcomes

People with dementia will be empowered to continue to get out and about as independently as possible, which will increase self-esteem and confidence and strengthen their own personal capacity and resilience.

Funding Approach: targeted

Start and End Date: May 2015 – April 2016

Fundees: Scottish Dementia Working Group

Partners: N/A

Award Amount: £7,000

Links to Trust Programme Strategy

Priority/ies: Priority 2 “Protect and promote the independence of people affected by dementia”, specifically, “Increase and develop knowledge and understanding about confidence and independence in people affected by dementia and demonstrate how this can be put into action”.

Links to Trust Programme Outcomes:

More people affected by dementia can say:

- I am able to be as independent as possible
- I get the help I need when I need it
- I am empowered to do the things that are important to me

Evaluation: a proportionate evaluation method is being explored with the SDWG that is in line with the Trust’s evaluation framework.

Next Steps:

- Award letter to be issued.

A.1.4 Development of New Funding Initiative Proposals

Theme: End of life care

- **Relates to Programme Strategy Priority/ies:** Priority 5 “Empower people affected by dementia so that they can do the things that are important to them”, specifically, “Increase and develop knowledge and understanding about how a good quality of life can be sustained even to the end of life”.
- **Background and Progress to Date:** workshop held on 14 January 2015. Workshop report will be published in May/June 2015. Steering group for proposal will convene in June 2015.
- **Proposals ready for consideration by Trustees by:** August 2015

Theme: Music and dementia

- **Relates to Programme Strategy Priority/ies:** Priority 1 “Enable people affected by dementia to live in a place that suits them and their needs” and also related to quality of life.
- **Background and Progress to Date:** workshop held on 16 March 2015. Workshop report and concept paper will be published in May/June 2015. Steering group for proposal will convene in June 2015.
- **Proposals ready for consideration by Trustees by:** August 2015

Theme: Dementia and Spirituality

- **Relates to Programme Strategy Priority/ies:** Priority 4 “Create a culture in Scotland where people affected by dementia feel safe, listened to, valued and respected”, specifically, “Increase understanding about the particular issues that people from certain ‘protected characteristic’ groups may face when they are affected by dementia”.
- **Background and Progress to Date:** workshop held on 19 March 2015. Workshop report will be published in May/June 2015. Steering group for proposal will convene in June 2015.
- **Proposals ready for consideration by Trustees by:** August 2015

A.1.5 Programme Advisors

Lay advisors: in autumn 2014, the Trust advertised for four advisors who are living with dementia and four carers of people with dementia. Many applications were received from carers and four lay carer advisors will be appointed by July 2015. One application was received from a person with dementia and he has been appointed as an advisor. The Programme Director is approaching three more individuals living with dementia (one man and two women) to ask them to become advisors to the Programme.

Professional advisors: the Programme Director is updating the list of proposed unpaid professional advisors to the Programme, to be approved by the Dementia Programme Committee in May 2015.

Section A – Programmes

A.2 Care Experienced Young People Programme

A.2.1 Completed Funding Initiatives

A.2.1.1 Title of Funding Initiative: Individual Grants Pilot for Care Experienced Young People

Aim

- To test the impact of Individual Grants on care experienced young people.
- To test delivery methods.
- Evaluate the above and, depending on outcomes, develop proposals for further delivery of Individual Grants to care experienced young people.

Intended Outcomes

- Life Changes Trust and partners/wider stakeholders have improved understanding of the impact of individual awards on care experienced young people
- Improved understanding of how individual awards can be effectively delivered for this beneficiary group
- More care experienced young people have opportunities to make choices about what they require to meet their needs and fulfil their aspirations.
- Care experienced young people have increased opportunities to be listened to and have their expertise and experience recognised
- Care experienced young people have improved motivation and self-belief
- Care experienced young people have more work-related skills and opportunities to sustain their further or higher education place

Funding Approach: Open Call

Start and End Date: July to September 2014

Fundees: Care experienced young people in Glasgow City and the Highlands

Partners: Barnardo's; Includem; Who Cares? Scotland. Additional support from Glasgow City Council and Highland Council.

Award Amount: £100,533 = Total funding allocated

209 awards made to individual young people.

Links to Trust Programme Strategy

Priority/ies

- Primary impact - Priority 1: Care experienced young people are loved, valued, respected and listened to
- Additional impact: Priority 4: Care experienced young people have improved access to education, training and employment.

Links to Trust Programme Outcomes

More care experienced young people can say:

- I live in a place that suits me and my needs
- I am able to be as independent as possible
- I get the help I need when I need it
- I feel safe, listened to, valued and respected
- I am empowered to do the things that are important to me

Summary of Activity

The Trust's pilot, which was delivered by programme staff in collaboration with colleagues from Barnardo's, Who Cares? Scotland, Includem, Highland Council and Glasgow City Council, was completed in November 2014. 209 awards were made to young people with experience of every care setting (including kinship care and young people looked after at home).

The aims of the funding were deliberately broad, to support flexibility. Care experienced young people could apply for funding for anything which:

- improved immediate circumstances
- supported personal development

Assessment was carried out in-house. The Trust employed a temporary, part-time Programme Assistant to provide additional capacity. Applications were turned around within four weeks, with a further seven-to-ten day timeframe for payments to be made.

Evaluation

The Evaluation included:

- feedback from funding recipients on the benefits of their funding award and experience of funding process (the survey response rate was 12%)
- analysis of funding award allocations by area; age; experience of care; purpose of funding award
- feedback on the funding process and its outcomes by Support Workers in partner organisations

A full evaluation report was completed in January 2015 which includes quantitative and qualitative elements as above. The report was considered by the Trust's Care Experienced Young People Committee in February 2015.

Findings/Results

The evaluation showed positive outcomes for beneficiaries including:

- Emotional- improved confidence and motivation
- Practical- supporting study/employment/independent living
- Life skills- managing money, researching costs, planning activity

Evaluation confirmed that outcomes relating to learning about delivery of individual grants was achieved.

The full evaluation report provides more details. A summary report was prepared in March/ April 2015 and will be published on the Trust's website in May/June.

Next Steps

- The Trust supports continued development of Individual Grants for Care Experienced Young People by incorporating their delivery into Champions Boards as they develop. [Champions Boards are developing at regional level in Scotland to give care experienced young people the opportunity to get round the table with key decision makers to use their experience to influence improved policy and practice. The Trust is planning to invest in these Boards and support the development of a national learning and improvement network.]
- The Trust works with others, including the private sector and other funders, to identify continuing funding to make driving lessons available for all care leavers who wish to learn in Scotland.
- The Trust allocates £60,000 per annum to deliver Individual Grants to support highly aspirational applications from care experienced young people aged 21–26.
- The Trust proactively shares the outcomes, impact and learning from this pilot to show what this type of investment can achieve in the lives of young people.

A.2.2 Active Funding Initiatives

A.2.2.1 Title of Funding Initiative: Engaging and Empowering Care Experienced Young People (Stage 2)

Aim

To transform the lives of care experienced young people living in Scotland to create better outcomes, improving life chances, reducing stigma and creating a positive care identity.

Intended Outcomes

Engage

- Building individual confidence and connecting care experienced young people to one another and to their communities of place and interest.

Mobilise

- Enabling care experienced young people to influence decision-makers and wider society through Champions Boards and other related developments and supporting the care-proofing of policy and practice locally, regionally and nationally.

Empower

- Utilising the Alumni movement and Champions Boards to promote active citizenship, challenge discrimination and hold Corporate Parents to account

The three core strands of activity described in this proposal are linked and mutually supportive. The empowerment of young people will shape transformational, systemic and sustainable improvements that will benefit future generations of care experienced young people.

Funding Approach: Targeted

Start and End Date: January 2015 to December 2018

Fundee: Who Cares? Scotland

Partners: N/A

Award Amount:

- 2015/16: **£398,433**
 - 2016/17: **£410,547**
 - 2017/18: **£423,263**
- Total: **£1,232,243**

Links to Trust Programme Strategy

Priority/ies: Priority 1: Care experienced young people are loved, respected, valued and listened to.

Links to Trust Programme Outcomes

More care experienced young people can say:

- I live in a place that suits me and my needs
- I am able to be as independent as possible
- I get the help I need when I need it
- I feel safe, listened to, valued and respected
- I am empowered to do the things that are important to me

Background

One of the required outputs from the Trust's development funding for Who Cares? Scotland in 2014, was development of a longer term funding proposal to further develop engagement, empowerment and influencing of care experienced young people across Scotland.

A funding proposal was received from Who Cares? Scotland in October 2014. Following assessment by Trust staff, Trustees approved this application in November 2014. Funding commenced in January 2015 to support the following key activities:

- Development of Scottish Alumni of Care Leavers and Regional Participation Network
- Summer Camp and National Festival
- Development of partnerships locally and nationally
- Supporting care experienced young people's involvement in Champions Boards
- Corporate Parent training
- Employment of Care Experienced Young People

Progress to Date

- **Membership development/positive Care I.D.** – WC?S recruited a further 112 Family members, 10 Alumni members and 8 Friends to the membership programme, bringing our running total to 325.
- **Alumni of care leavers** – WC?S held the first gathering of the Alumni of care leavers in March. This was well attended and helped us get this initiative off to a very positive start.
- **Influencing policy** - engaged with 51 care experienced young people in policy consultations on issues such as social isolation, women and welfare inquiry and children affected by parental imprisonment.

- **Influencing – stakeholder engagement** - 8 Conference inputs with overall attendance of 2,370, involving 10 care experienced young people. These include Aberdeen Learning Festival, Scottish Funding Council – access for all, CELCIS – engaging care experienced students and the Social Work Strategy launch in March.
- **Champions Boards** - We have continued to develop a range of new Champions Boards across Scotland to take the total number to 8 Champions Boards spanning 8 Local Authorities with 98 care experienced young people supported by Who Cares? Scotland.
- **Corporate Parenting** - Delivered 28 Corporate Parenting and other training sessions, involving 23 different care experienced young people. This included CHS Panel member training and Act to Practice sessions.

Evaluation

During 2014, the Trust funded Evaluation Support Scotland to work with Who Cares? Scotland so the organisation could develop its evaluation practice. This work is now complete, and a “logic modelling” approach to evaluation underpinned WC?S funding proposal to the Trust for Stage 2. Staff members across different levels of the organisation received appropriate training on evaluation, including measuring outcomes and supporting young people to “tell their story”. A toolkit for gathering outcome information from care experienced young people has been developed.

Methods

WC?S will use a mix of quantitative and qualitative evaluation methods to assess and report on activity and outcomes of this funding award.

A.2.3 New, Approved Funding Initiative Proposals

A.2.3.1 Title of Funding Initiative: Champions Board Development

Aims

To invest in and support the development of Champions Boards across Scotland, to enable systemic, transformational and sustainable improvements to the support provided to care experienced young people over time, improving their quality of life and well-being.

Intended Outcomes

- Overarching outcomes for this initiative, with linked milestones and KPIs, are being developed, which will link to the Trust's high level care experienced young people Programme and corporate outcomes.
- Trust staff will provide potential applicants support for the open call funding stream with guidance to allow them to include appropriate outcomes in their funding proposals. Trust staff will then work with Trustee-approved open call award holders to confirm outcomes for their initiative.

Funding Approach: Open Call between May and October 2015

Start and End Date: 2015-2023

Fundees

- **Area-based Champions Boards:** Eligible applicants for open call = local consortia with partners from both the statutory and voluntary sector and genuine and significant involvement of care experienced young people.
- **National communities of interest Champions Boards:** Third Sector led, with multi-agency partnership and genuine and significant involvement of care experienced young people.

Partners: Partner contributions will be defined as our Champions Board approach develops.

Award Amount: A total proposed investment of £7,500,000 over 8 years, with an initial three-year total investment of £2.3m.

See funding guidance for more information about different types and levels of funding awards (available on our website).

Links to Trust Programme Strategy

Priority/ies: This proposal will support delivery of all 5 of the Trust's Care Experienced Young People Strategy priorities.

Links to Trust Programme Outcomes

More care experienced young people can say:

- I live in a place that suits me and my needs
- I am able to be as independent as possible
- I get the help I need when I need it
- I feel safe, listened to, valued and respected
- I am empowered to do the things that are important to me

Evaluation

Potential applicants will be provided with initial evaluation guidance to support their application. Fundees will be provided with more in-depth evaluation guidance and support. Fundees will also be expected to participate and support a Scotland-wide Champions Board Learning and Improvement network, which will aid progress and evaluation.

Fundees will be required to provide six-monthly monitoring reports, to enable fundees and the Trust to report on progress, identify good practice and identify and resolve challenges in a timely way.

Next Steps

An open call application process will be launched on 1st May 2015, with a number of elements including:

- Self-assessment questionnaire
- Applicant information sessions
- Columba 1400 leadership development
- Final bids

A.2.3.2 Title of Funding Initiative: Peer Mentoring

Aim

To invest in an initial phase of peer mentoring projects for care experienced young people, which will provide support to recipients while assessing benefits of this approach.

Intended Outcomes

- Care experienced young people have more opportunities to develop relationships with each other.
- An increased number of care experienced people have their expertise and experience recognised.
- More care experienced young people have a positive experience of relationships,
- An increased number of care experienced people are active citizens.
- Communities have more opportunities to understand and support care experienced young people.

Funding Approach: Open call between 1st April and 31 October 2015.

Start and End Date: Projects will be funded over an initial two year period, 2015-2017.

Fundees

The Trust will accept applications from the following Third Sector organisations:

- Registered charities
- Constituted community groups
- Scottish Charitable Incorporated Organisations
- Community Interest Companies
- Companies Limited by Guarantee
- Educational bodies
- Trusts

The Trust will accept applications from partnerships or collaborations, including those with public sector organisations or educational bodies, where third sector organisations would be the lead partner.

Partners: The Trust will work in partnership with the Scottish Mentoring Network.

Award Amount

Total budget for funding awards = £500,000 (£250,000 per annum)

Maximum budget per initiative = £90,000 (£45,000 per annum)

Links to Trust Programme Strategy

Priority/ies: The peer mentoring initiative is related to Priority 3 with a particular focus on care experienced young people having supportive and caring relationships.

Links to Trust Programme Outcomes

More care experienced young people can say:

- I get the help I need when I need it
- I feel safe, listened to, valued and respected

Evaluation

Details of our proposed evaluation approach for this initiative are under development, informed by the Trust's Evaluation Framework. Initial evaluation guidance will be provided to applicants with further guidance and support provided to fundees as required.

Funding of separate external evaluation support for all funded projects will be considered in the wider context of Trust support for building the evidence base on the impact of mentoring.

The Trust will use evaluation reports from each funded initiative to prepare an overall evaluation report, which would be published in full and summary formats.

Learning from funded peer mentoring projects will be disseminated through Champions Boards and in other ways.

Next steps

An open funding call will be launched on the 1st April 2015 and scheduled to close on the 13th May 2015, after which the assessment stage will begin.

A.2.4 Development of New Funding Initiative Proposals

A.2.4.1 Theme: Champions Boards (Dundee)

Links to Programme Strategy

Priority/ies: This proposal supports delivery of all 5 of the Trust's Strategy priorities.

Link to Trust Programme Outcomes:

More care experienced young people can say:

- I live in a place that suits me and my needs
- I am able to be as independent as possible
- I get the help I need when I need it
- I feel safe, listened to, valued and respected
- I am empowered to do the things that are important to me

Background

A key element of the Trust's Care Experienced Young People Programme Strategy is investment and support for the development of local and national Champion Boards, which will enable Care Experienced Young People, service providers and others to work together effectively to improve quality of life and well-being for care experienced young people across Scotland in the medium and longer term.

The Trust believes that care experienced young people have a significant part to play in shaping and influencing policy and practice in areas that impact on their lives as a group, as demonstrated by their role in influencing key legislation and policy via campaign work and through local Champions Boards. Our investment in the development of Champions Boards will therefore focus on supporting structures, processes and relationships which will build on existing success so that care experienced young people are enabled to take an active role in shaping and influencing direction.

Progress to Date

Between January-March 2015 the Trust programme staff met with members from Dundee Champions Board (the most established example in Scotland) and have supported them to produce a targeted funding proposal for the Trust, which will be considered by the Programme Committee in May 2015.

Proposal ready for consideration by Trustees by: May 2015

A.2.4.2 Theme: Mentoring in Education

Links to Programme Strategy

Priority/ies: The mentoring in education initiative is related to Priority 4 - care experienced young people have increased access to education, training and employment.

Links to Trust Programme Outcomes:

More care experienced young people can say:

- I get the help I need when I need it
- I feel safe, listened to, valued and respected
- I am empowered to do the things that are important to me

Background

Trust staff have been working with a variety of organisations and consulting with young people to inform development of Trust funding proposals on mentoring support for care experienced young people.

Trust staff have been working with MCR Pathways and several other funding organisations on a prospective, targeted funding proposal for a major educational mentoring initiative for care experienced young people.

Commencing in 2008, MCR Pathways has developed a sound educational mentoring model, working in partnership with schools in the East End of Glasgow. Evaluation shows significantly improved attendance, attainment and achievement for disadvantaged young people receiving the mentoring service, along with other support from their school.

The MCR Pathways education mentoring approach includes three, linked and complementary "paths":

- re-engagement into the core education system
- progression to further education or direct employment
- a Pathway into Higher Education

The end-goal for each of these three pathways is to support progression towards high quality career opportunities matched to the abilities and ambitions of each young person. This is achieved by providing young people with a trusted, listening adult (a volunteer mentor) who can help anchor and support them to achieve their full potential.

Progress to Date

In early 2015, MCR Pathways started preparation of a funding proposal for the Trust, Robertson Trust, Glasgow City Council (GCC) and other possible funder/s.

It is proposed that the funding model is a Public Social Partnership fund, with Trust's funding to cease after 3 years, with continuing funding provided by GCC, should evaluation show expected benefits.

Proposal ready for consideration by Trustees by: May 2015

A.2.4.3 Theme: Strengthening Insight and Workforce Development

Links to Programme Strategy

Priority/ies: The Insight and Workforce Development proposal will sit within Priority 3 – care experienced young people have access to effective and caring support and guidance when and where they need it.

Background

The Trust has established and convenes a working group with key organisations to identify investment priorities and develop funding ideas to:

- improve collective insight into the needs of care experienced young people and what works in improving their lives
- consider how staff in all sectors and organisations can be better supported themselves, to provide improved services and better support to care experienced young people to achieve better outcomes.

In addition to Trust staff, members of the working group include representatives from the Centre for Excellence in Looked After Children in Scotland (CELCIS); Scottish Through Care and After Care Forum (STAF); Who Cares? Scotland.

Progress to Date

During January-March 2015, the working group met once and invited IRISS to join as a new member. The group's work over the past six months has informed the Trust's decision to focus on relationship-based practice and strategically invest funds to:

- develop improved knowledge and skills of the paid and voluntary workforce which support care experienced young people so they are more able to meet the needs and aspirations of care experienced young people and improve their outcomes
- increase and strengthen information sharing, learning and collaboration between national and local service providers

Proposals ready for consideration by Trustees by: August or November 2015
Committee (tbc)

A.2.4.4 Theme: Employment

Links to Programme Strategy

Priority/ies: The theme of employment is related to the Programmes' fourth priority – that care experienced young people have access to improved education, training and opportunities.

Background and Progress to Date:

Programme staff are developing plans for an open call funding offer on employment for care experienced young people, as part of our Corporate Social Venturing initiative (see Cross Programme section below.) It is envisaged that the funding call will be launched in late May/early June.

Other employment developments will be progressed through Champions Boards. Trust staff are also in the early stages of exploring a national care experienced young peoples' employment partnership with the Scottish Council for Development and Industry, Young Enterprise Scotland and others.

Corporate Social Venturing Funding Proposals ready for consideration by Trustees by: January 2015.

Others: tbc

A.2.5 Volunteer Advisors

- The Trust currently benefits from having two care experienced people as volunteer advisors to the Programme. Plans are being developed in consultation with our two care experienced advisors to establish a larger Reference Group of care experienced advisors. The Trust will also recruit a pool of professional advisors.

Section A – Programmes

A.3 Cross Programme Initiatives

A.3.1 Active Funding Initiatives

Title of funding initiative: Corporate Social Venturing

Aim

This project aims to support transformational and sustainable improvements in the quality of life and well-being of care experienced young people and people affected by dementia using targeted, loan investment to organisations which provide employment, social and other support.

Intended Outcomes

Beneficiary Outcomes

Care experienced young people have:

- improved employment opportunities
- improved confidence
- improved skills

People affected by dementia have:

- improved confidence
- improved social inclusion
- improved relationships

CSV Initiative Outcomes

- Corporate partners provide effective business mentoring and training to funded ventures, helping them to develop a sustainable business model, which achieves agreed outcomes for beneficiaries

Life Changes Trust/Partner Outcomes

- A Trust model of CSV that can be repeated in the future.
- A social load/investment funding option for the Trust, complementing its grant funding
- The introduction of the CSV model to Scotland
- Greater access to social investment finance in Scotland
- High profile Corporate Social Responsibility (CSR) activity
- Staff development (Corporate Partners)

Funding Approach: Open call, loan finance funding.

Start and End Date: Launches end May/early June 2015, runs until 2019

Fundees

Social ventures in Scotland which can demonstrate a feasible, sustainable and innovative idea that achieves one or more of the outcomes above.

Partners

Investment and Support Partners:

- Life Changes Trust
- Big Issue Invest
- Scottish Council for Development and Industry
- And following companies: Mitie, Places for People Scotland Care & Support and PricewaterhouseCoopers.

Delivery Partners: funded ventures, once confirmed.

Award Type: Loan

The loan funding will be underwritten by the Trust. Loan issue and management will be undertaken through Big Issue Invest, which is registered to manage social loans.

Award Amount

Upper limit of £50,000 per applicant; £500,000 = total amount to be awarded

Background

The Initiative will:

- find and support, through loan finance and mentoring, up to 10 viable social ventures in Scotland to help them develop financially sustainable solutions to delivering improved outcomes to the Trust's beneficiary groups
- support funded ventures to undertake effective evaluation
- share learning to guide improved practice more widely

Big Issue Invest (BII) is a leading UK social investment intermediary organisation and has pioneered CSV in England. BII is committed to taking forward and sharing with other organisations the success and learning from the CSV Programme. This partnership will bring CSV into Scotland for the first time. CSV is a pioneering model for investing in and growing early stage ventures committed to creating social impact.

The corporate partners will provide free mentoring and business support to shortlisted and funded ventures. They may also contributed capital to the loan fund. Shortlisted ventures receive initial mentoring from corporate partners' staff to help them strengthen their business plan and pitch to partners' panel, to secure funding.

Funded ventures then receive continuing mentoring and business support for at least the first 12 months to help them develop effectively and establish a sustainable business model.

Ventures deliver to beneficiaries with ongoing support and evaluation. Loan repayment is not required until the third or fourth year of activity. (The loan may be converted to a grant if appropriate.)

Progress to Date

- December 2013: Initial discussions between Life Changes Trust and Big Issue Invest
- June 2014: Approval of proposal by Board
- October 2014: Recruitment and induction of part-time Social Investment Project Manager
- October – December 2014: planning and development
- January – March 2015: Recruitment of corporate partners in Scotland to support the programme (to be announced)
- April-May: planning for launch

Evaluation

A tailored evaluation plan for the initiative will be developed, utilising BII's current evaluation plan for England, with appropriate adaptation in line with the Trust's Evaluation Framework.

Section B – Communications, Public Relations and Influencing

B.1 Digital Communications

Website

Current Website: throughout January-March 2015, Trust communications staff continued to ensure that our current website content was accurate and up to date and to continue to drive traffic to our website. Between January-March 2015:

- web sessions increased 9% on the previous three month period (4397 web sessions increasing to 4799 web sessions)
- around 59% of people who used the Trust's website were new visitors

This steady increase in our website use is due to distribution of our e-bulletins, funding announcements and profile building on social media and promotion of the Trust through events.

Development of new website: Consultation and planning for the Trust's new website were completed during January and March 2015. Design and content stages should be completed by May, with the website launching in early June 2015.

E-bulletins

The Trust issues regular e-bulletins which highlight funding announcements and Trust news with links to more information on our website. Between January and March 2015 we issued two full e-bulletins and two e-shots, one an invite to our consultation workshops for our new website and the other a dementia survey.

At the end of December 2014, there were 856 subscribers. By the end of March 2015, there were 909 subscribers, an increase of 6%.

Twitter

The Trust Twitter account is very active. We monitor activity throughout the day, and update with daily Tweets on funding, event and Trust news. We also retweet/are re-tweeted continuously. We aim to continue to build our social media profile to increase our reach, our network and to drive traffic to the website.

Funding announcements and funding calls to action have meant a busy period on Twitter and a correlating significant rise in followers.

- At the end of December 2014, the Trust had 734 followers.
- By the end of March 2015, the number was 871, an increase of 18% over three months.
- The Trust's Twitter feed is directly linked to our Facebook page.

B.2 Publications

In January 2015, we published our full and summary versions of our Business Strategy for 2014-23 on-line, with hard copies of the summary version. Corresponding online and printed versions of both programme strategy summaries will be published in April.

In March 2015, a full and summary version of our Care Experienced Young People programme Individual Grants Evaluation report was finalised for publication and designed in-house. This will be published on-line.

B.3 Events

Trust Events

In February 2015, we held two stakeholder consultation events, one for each programme, as focus groups for the development of the Trust's new website. Both were very well attended, and included care experienced young people and people with dementia and carers. They were very insightful and the learning from these events has informed design of our new website.

Between January and March 2015 the Trust also held three consultative workshops to inform planning of prospective new funding initiatives for our People Affected by Dementia Programme. Workshop themes were: music and dementia; end of life care for people with dementia; and spirituality and dementia. Reports on these workshops will be published in summer 2015, with recommendations to be considered by our Programme Committee.

External Events

Trust staff pro-actively identify key events at which we should be represented as well as responding to invitations (Trust staff also prepare event reports to share internally to aid learning across the organisation).

In February 2015, the Trust had an information stall at the 2 day SCVO-organised 'The Gathering'. Staff who attended to look after the stall were very busy with enquiries and information exchanges, with around 75 sign-ups to the Trust e-bulletin.

In February 2015, the Trust had an information stall and sent delegates to the annual Holyrood Older Person's conference, attended by over 200 people.

Trust programme staff also attended 9 events including:

- 7th Scottish Caring and Dementia Congress
- Evaluating community-based services for People with Dementia Workshop
- National Carers Strategy Learning and Sharing event
- Social Impact Bond – Care Leavers
- Scottish Care Leavers Covenant/Access All Areas
- Young Foundation Event
- In-Control Scotland Event
- Improving the experience of care: the potential of social pedagogy

B.4 Media

In March 2015, the Trust issued ten media releases, announcing Trust funding for ten out of fourteen Committee-approved dementia friendly community initiatives. Our media releases focussed on regional media in the area in which the funded initiatives were located, or nationally where appropriate. We achieved extensive and wide-ranging regional and national media coverage. Media announcements for the remaining four dementia friendly community initiatives will be announced in April 2015, subject to their satisfactory completion of due diligence.

Also in March 2015, the Trust issued a national media release announcing our Bright Ideas funding for People Affected by Dementia. There was fair media coverage, with a much higher level of stakeholder and sector coverage in newsletters, news pages on websites and across social media.

For all media campaigns, activity comprised media release and direct contact with journalists, as well as Trust social media campaigns and cross pollination of fundee/Trust website and aligned social media activity.

Section C – Governance, Management and Operational Support

C.1 Governance and Leadership

Governance

Trustees, the CEO and Programme Directors worked together during January, February and March 2015 to support effective governance and leadership of the Trust, including a Trustee and Senior Staff away day, three committee meetings and one Board meeting.

- **Trustees and senior staff Away Day January 2015:** to review progress to date and discuss future plans.
- **Programme Committees (one for People Affected By Dementia and one for Care Experienced Young People) February 2015:**
To review progress, consider new funding initiative proposals, consider recommendations for funding. Minutes of our February Programme Committees will be published on our website following approval at May Committee meetings.
- **Finance Committee: February 2015**
Consider third quarter accounts; consider draft budget for 2015-16. Minutes of our February Finance committee will be published following approval by our June 2015 Committee.
- **Board: March 2015**
Trustees considered a range of key issues at our March Board, including our:
 - draft budget for 2015-16
 - proposed performance management arrangements for the Trust, linked to programme evaluation
 - our Investment Strategy

The March Board also approved:

- appointment of two new Trustees – Nigel Fairhead and Shona Munro
- changes to Chair and Vice Chair positions – Edel Harris stood down as Board Chair and was approved as Vice Chair; Alexis Jay was approved as Board Chair
- appointment of our Investment Management Services – Investec
- our rolling three year work plans for 2015-18 for our People Affected by Dementia and Care Experienced Young People Programmes

Minutes of our March Board will be published on our website once approved by our June Board meeting.

Senior Management Team

The Trust's CEO and two Programme Directors, who form the Trust's Senior Management Team, communicated and liaised throughout January-March 2015, to provide co-ordinated leadership and management of the Trust across corporate and programme activities.

C2. Business Strategy

Our Trustee-approved Business Plan for 2015-23 which includes our Corporate Strategy and two programme strategies, was published in January 2015.

Our Business Plan is available on our website in full and summary versions. A printed summary is also available.

A media release announcing publication of our Business Plan, with a supportive quote from the Chair of Big Lottery Fund's Scotland committee, was issued to key national and regional media outlets but received minimal coverage – which is fairly common for announcements of this kind.

The rest of this performance report provides an update on implementation of our Business Plan (also see work planning, risk management, performance management and evaluation section below.)

C.3 Financial Management

Investment Management

In March 2015, Trustees approved appointment of Investec as the Trust's provider of investment management services. They also approved our Investment Strategy, with implementation commencing from April 2015. Our investment strategy will be published on our website.

Financial Management

- Our third quarter financial accounts (October-December 2014) were available by early February 2015 for consideration by our Finance Committee and other Trustees (see Governance).
- In March 2015, Trustees approved the Trust's 2015-16 budget.

C.4 People Management

- All staff had their monthly planning and review meetings with their line manager to support planning and delivery of their work and personal development.
- The staff Training and Development Schedule for 2015-16 was reviewed and updated during March 2015.
- The all staff bi-monthly meeting was held in February 2015.
- Between January and March 2015, good progress was made in developing the Trust's Total Reward Policy (TRP) for its staff, with support from an independent HR consultancy service. The TRP will include the Trust's pay administration policy, which will be developed during April-May 2015, with support from our HR consultancy. Proposals will be considered by our June 2015 Board.
- During March 2015 a new, permanent PA to the CEO was appointed.

C.5 Insight and Knowledge Management

During January-March 2015, Trust staff continued to develop their insight into beneficiaries, policy and practice issues to inform planning and delivery of our work. We develop our insight through:

- reviewing published information
- discussions with beneficiaries and stakeholders through meetings and events (see above)
- learning from Trust performance management and evaluation (see below)

The Trust has a number of internal knowledge management arrangements in place to capture and share key information, which we plan to develop and improve from summer 2015.

C.6 Funding Management

Trust staff continued to develop our funding management arrangements to support good practice. The Trust's Funding Manual was reviewed by the Management Group in February 2015 and will be updated as required. The manual provides staff with guidance and templates to support:

- preparation of funding guidance to support funding calls and applicants
- assessment of funding applications
- due diligence
- funding awards
- fundee liaison and support (with reference to monitoring and evaluation, which is supported by our programme evaluation resources - see below)

C.6 Work Planning, Risk Management, Performance Management and Programme Evaluation

Work Plans

During January - March 2015, Trust staff developed internal work plans for key areas of Trust work, to support implementation of the Trust's approved Business Plan:

- rolling, 3 year programme work plans 2015-18 (approved by March Board - see above) which will be published on our website in summer 2015
- annual work plans for governance; finance; communications, PR and Influencing; and operations (latter includes a range of operational support activities including, performance management, funding management, ICT, Human Resources etc)

Funding Initiative Proposals

The Trust has developed a standard format to support planning of new funding initiative proposals for consideration by Trustees. Our funding initiative proposals include information on the following:

- need and rationale, including fit with Trust Business Plan, including Programme Strategies and work plans
- aims, objectives and outcomes
- funding approach (e.g. open call; targeted)
- total funding allocation for initiative and maximum award per applicant
- evaluation

Information on new, approved funding initiatives or funding initiatives under development for the period January-March 2015, is provided in Section A.

Risk Management

The Trust's Management Group, which includes the CEO, Programme Directors, Business Manager and Communications Manager, reviewed our risk management schedule during March 2015 and progressed actions as necessary. Our risk schedule is reviewed at least every two months by our Management Group. The CEO also provides quarterly risk reports to our Finance Committee and at least an annual risk report to our Board. All matters identified as high risk are reported to Trustees as they are identified.

Performance Management

Between January-March 2015, the CEO developed a first draft of a performance management plan for the Trust, with support from the Trust's Business Manager and a consultant from Social Value Lab.

The plan is based on the Public Service Improvement Framework (PSIF), which is a not-for profit version of the European Framework for Quality Management (EFQM), developed in Scotland by Quality Scotland, Investors in People Scotland and the Improvement Service (for Scottish Local Government).

Our draft performance management plan is fully linked to the Trust's Business Plan for 2015-23, related work plans and our proposed programme evaluation framework. The plan includes key performance measures and milestones for all key areas of Trust activity (e.g. governance; resources; processes) as well as our customer results and outcomes.

Our draft performance management plan was discussed with Trustees at our March 2015 Board. A final draft plan will be considered by our June Board, along with our Programme Evaluation Framework.

Programme Evaluation

During February-March 2015, Trustees were consulted on the Trust's proposed programme evaluation framework and plans for our linked, online Evaluation Toolkit. A final draft of the Framework will be considered by Trustees at our June 2015 Board meeting, linked to our performance management plans. Meanwhile, Trust staff continue to develop evaluation guidance for current Trust funding initiatives, informed by our proposed framework. Progress in preparing the evaluation toolkit for publication in July 2015 also continues, with support from Evaluation Support Scotland, Research for Real and the Social Value Lab.

Management Group

The Trust CEO, the Programme Directors and Managers, the Business Manager and Communications Manager all support continuing management of the Trust and delivery and review of our work through regular liaison, including formal Management Group meetings, which are held every month.

C.5 Other Operational Support (not covered in above sections)

In addition to the above, Trust staff also continued to provide other operational support for effective delivery of our work, including Information and Communications Technology (ICT) support, facilities management and administration support.

Life Changes Trust, May 2015