

**Dumfries and Galloway Seniors Forum\***  
**THREE YEAR PLAN, 2009 – 2012**

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~ 1988- 2009 ~

**21 years of representing and supporting the needs of everyone aged over fifty in Dumfries and Galloway**

## Section 1

**Purpose and Summary of Plan for 2009 – 2012**

1.1 We exist to support and represent the population of senior citizens in Dumfries and Galloway, especially in relation to their welfare and well-being, as they live, work, retire and enjoy life across our region.

1.2 We believe that amongst all those people aged over fifty in Dumfries and Galloway there are many who are willing and able to make valuable contributions to the quality of life of their communities, benefiting others as well as themselves – bringing a wealth of experience and knowledge, awareness of issues or concerns, often identifying specific needs, frequently getting involved and participating in purposeful and sociable activities.

1.3 In these three years, 2009-2012, we have much work to do.

1.4 We will refine the ways in which we are able speak with a clear and well-informed voice on behalf of senior citizens. We plan to develop

- our information and consultation base
- our understanding of the needs of different ages and communities of those over fifty
- our capacity to be reliable and well-informed in our contact with other voluntary and statutory sector agencies, listening and listened to.

1.5 We intend to develop our links with other advice giving agencies to be able to ensure that any senior citizen can have good access to appropriate information and guidance, whatever their needs and/or whatever their capabilities with internet, telephone or written material (all of which can change with age).

1.6 We will develop The Forum - including changing its name from Dumfries and Galloway Elderly Forum to Dumfries and Galloway Seniors Forum –

- making it relevant to all ages over fifty
- reinforcing the role of its members and the grass roots groups of members which meet across the communities of the region
- putting in place improved communication across the whole membership, with and between the groups, and with the Forum's office in Dumfries.

## Section 2

### **Background to The Forum's activities and role**

2.1 Dumfries and Galloway Elderly Forum was formed 21 years ago and achieved charitable status in 1998. The organisation has a track record of working on behalf of older people, giving them a voice in the affairs of the area in which they live and especially when issues are likely to affect them directly. The Forum has always done this through its ethos of membership – that is, through older people acting and speaking on behalf of themselves and other older folk.

2.2 The Forum has been a focus for contact between the local authority and other agencies and the population of senior citizens within its area. Issues raised that have been important over the years have been transport, health, care and welfare, housing, fuel poverty, and benefit maximisation.

2.3 Over the last ten years, membership of the Forum has been in the thousands (at its peak in 2005 at 3,600) and has always been spread geographically throughout Dumfries and Galloway. Local groups have sustained programmes of activities in Annan, Castle Douglas, Dalbeattie, Dumfries, Kirkcudbright, Lockerbie, Machars (Wigtown & district), Moffat, Rhins (Stranraer & district). The Forum has its central base in a small office in Dumfries that is open five days a week for information and contact (in person, by phone or email) from anyone aged over fifty in Dumfries and Galloway.

2.4 At the start of this Plan period (2009) staff of the organisation are a full-time Manager and two part-time Administrative Assistants. Many members of the Forum are active in taking on unpaid/volunteer roles within the organisation – both in the Forum's overall activities, as Governing Body members, and in the Forum's local groups spread throughout Dumfries and Galloway.

2.5 Funding has been received from Dumfries and Galloway Council in the form of a Service Level Agreement (SLA) for the period April 2007 – April 2010 to support the consultative and representative work of the Forum to continue, along with its links in providing older people with sources of information, and in assembling data on all matters affecting the population over fifty. The SLA and its funding is a significant, necessary and important plank on which the work of the Forum rests, and is seen as part of a broad resource base. Additional funding (including support from the Forum's membership) is essential to enable the wide and effective scope of provision that the Forum envisages for the years ahead and is appropriate in sustaining the Forum's independence.

### Section 3

## **Demographic, social and economic context for 2009 – 2012, within which The Forum will make its contribution to the lives of senior citizens in Dumfries and Galloway**

### National Context

3.1 **“Our aim, working with our partners, is for a Scotland which values, and benefits from, the talents and experience of its older people.”** *Older People and Age Team, Scottish Government, December 2008*

3.2 At national level, *All Our Futures: Planning for a Scotland with an Ageing Population* was published by the Scottish Executive in March 2007, and deals with the issues around the demographics of ageing of the population in Scotland.

3.3 In particular *All Our Futures* -

- sees older people as contributors to life in Scotland,
- seeks to break down barriers between generations, and
- aims to ensure that services are in place so that people can live life to the full, as far as possible, as they grow older.

### Local Context\*

3.4 Dumfries and Galloway is the third largest region in Scotland. It covers 2,380 square miles, with a 100-mile spread from east to west and has an estimated population of 148,030 – approximately 60 people per square mile compared with the Scottish average of 168. It is characterised by small settlements spread across a large area, where over a quarter of the population live more than 30 minutes drive from a large town and people live mainly in small communities of 4,000 or less or in the countryside. The biggest town is Dumfries with an estimated population of 37,110, followed by Stranraer with 10,600 and Annan with 8,240.

3.5 The total population has been retained at a steady figure in recent years, but the demographics are changing quite rapidly and present a challenge for the region in the years ahead. Dumfries and Galloway’s population of pensioners is 24.2% compared with the Scottish average of 16.4%; and over-75s account for more than 15% of the population. Projections indicate that by 2024, 51% will be over 65, an increase of 48%.\*

3.6 As part of its Single Outcome Agreement with the Scottish Government, Dumfries and Galloway Council has agreed five local outcomes, three of which in particular have a relevance to older citizens :

- a region where people live more active and healthy lives
- a place where people feel better connected, secure and at home
- people are better equipped for a changing world

\* Statistics from *TOGETHER IS BETTER*, Dumfries and Galloway Single Outcome Agreement for 2009-2011, Draft February 2009

## Section 4

**Planned areas of work, 2009 – 2012****A Representation : To be the voice of seniors in Dumfries and Galloway through representation, consultation, and regular gathering of information on needs, opinions and issues.**

4.1 This is a fundamental area of the Forum's work – in which senior citizens undertake consultative and representation work on behalf of their peer group. It rests on the Forum's unique ability to gather information from senior citizens across Dumfries and Galloway through its membership, member groups and networking. Being an effective voice also means that the Forum is ready to respond to issues as they arise and that it has sufficient skills amongst its members (through their experience and/or training) to provide good quality representation. A skills/experience/expertise directory of Forum volunteers who are willing to represent the Forum will be created.

4.2 The Forum will continue to have representation on the Dumfries and Galloway **Older People's Consultative Group** – to make a contribution to planning and developing local services with Dumfries and Galloway Council and the NHS. (8 Forum places, two for each of the four districts of D&G).

**Specific tasks and objectives**

2009-10	<ul style="list-style-type: none"> <li>• Recruitment of volunteer Forum members to respond to consultations and to represent/speak on behalf of the Forum at local/agency/national events.</li> <li>• Pilot "training/experience" sessions to establish Forum style and expectations in representation, briefing and reporting.</li> <li>• Begin a directory of Forum volunteers and their skills/experience/expertise</li> <li>• Establish information collection categories on national and local trends relating to people aged over 50 (topics, age bands, rurality, etc) and begin assembling information.</li> <li>• Selection of two or three key topics for focus – include in survey, media reporting, info collection (and see further, round of meetings in 4C)</li> <li>• Annual opinion survey of senior citizens in D&amp;G – led by the Forum surveying its membership and others aged over 50. Results communicated to partner organisations, the media and the public.</li> <li>• Create the post of Publicity Officer for the Forum. Begin regular press contributions. Seek further media opportunities.</li> </ul>
2010-11	<ul style="list-style-type: none"> <li>• Twice yearly recruitment drive and "training/experience" sessions to sustain volunteer Forum members in representing the Forum</li> </ul>

	<ul style="list-style-type: none"> <li>• Selection of two or three key topics for focus – include in survey, media reporting, info collection (and see further, round of meetings in 4C)</li> <li>• Prepare annual Forum statement of local and other trends, based on regular information gathering/statistics (all well sourced).</li> <li>• Annual opinion survey of senior citizens in D&amp;G – led by the Forum surveying its membership and others aged over 50.</li> <li>• Results of the two above communicated to partner organisations, the media and the public.</li> </ul>
2011-12	<ul style="list-style-type: none"> <li>• Selection of two or three key topics for focus – include in survey, media reporting, info collection (and see further, round of meetings in 4C)</li> <li>• Prepare annual Forum statement of local and other trends, based on regular information gathering/statistics (all well sourced).</li> </ul> <p>Annual opinion survey of senior citizens in D&amp;G – led by the Forum surveying its membership and others aged over 50. Results communicated to partner organisations, the media and the public.</p>

## Section 4

**Planned areas of work, 2009 – 2012****B Information : To provide and link sources of information and advice for anyone aged over fifty in Dumfries and Galloway, in order to support their quality of life now and in future.**

4.3 Many senior citizens come to the Forum for the first time when they are seeking advice or support for themselves or an older relative. Questions range across pensions and benefits, sources of care and support, housing, mobility difficulties, transport, health, consumer issues and others. The Forum will continue to monitor the nature of requests as part of its awareness of the levels of need and issues of concern amongst senior citizens (see Section 6).

4.4 In person through the door of the Forum's Office in Dumfries or by telephone are the main ways in which these enquiries reach the Forum at present. An email enquiry service will be developed. There will never be sufficient Forum resources to cope with a full response to all the questions that could be asked by senior citizens, nor indeed would the Forum wish to undertake the detailed and high quality casework that is already available from others (D & G Citizens Advice Service, Benefits Maximisation Team, Care and Repair, People's Advocacy Service, Princess Carers Trust, D & G Housing Partnership, Energy Saving Advice Centre).

4.5 The Forum is already known as an effective first port of call and wishes to develop clear signposting and referral links with other agencies across a wide range of need. During these three years, 2009-2012, the Forum will build relationships with other professional and voluntary advice givers. The Forum's role will be to direct an enquiry to the most appropriate next step – helping the enquirer and also limiting wasted time at the receiving organisations. Volunteers have an important part to play in the way the Forum provides its advice signposting service. It is appropriate for senior citizens themselves to be the mainstay of this, and the Forum will build, recruit and train a team that can respond to questions in person, by phone and email. A post of Volunteers and Information Officer will be created to develop this work, including promoting volunteering with the Forum (for example as a retirement opportunity).

4.6 Once a year the Forum will invite other advice agencies to meet to share perceptions and experience of the profile of need amongst senior citizens.

**Specific tasks and objectives**

2009-10	<ul style="list-style-type: none"> <li>• Office open for in person and telephone enquiries on Monday-Friday 9a.m. – 1p.m. with 6 volunteers in the team.</li> <li>• Develop email enquiry procedures.</li> <li>• Revamp website to assist email enquiries.</li> </ul>
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	<ul style="list-style-type: none"> <li>• Recruit and train advice signposting volunteers to grow the team to 6</li> <li>• Establish regular contact with other advice agencies - D &amp; G Citizens Advice Service, Benefits Maximisation Team, Care and Repair, People's Advocacy Service, Princess Carers Trust, DGHP, and all other agencies we need to link to.</li> <li>• Seek funding to employ a part-time Volunteers and Information Officer.</li> </ul>
2010-11	<ul style="list-style-type: none"> <li>• Office open for in person, telephone and replies to email enquiries on Monday-Friday 9a.m. – 1 p.m. and two afternoon sessions per week with 10 volunteers in the team.</li> <li>• Establish post of Volunteers and Information Officer</li> <li>• Recruit and train advice signposting volunteers to grow the team to 10</li> <li>• Take the advice signposting team out and about. Pilot sessions : “Talk to us first – we’ll help you make the next step the right one”</li> <li>• Through regular contact with other advice agencies develop an annual meeting with them to share experience, have a topic focus, present results of Forum annual survey, and share good practice in working with senior citizens.</li> </ul>
2011-12	<ul style="list-style-type: none"> <li>• Office open for in person, telephone and replies to email enquiries on Monday-Friday 10 a.m. – 4 p.m. with 12 volunteers in the team.</li> <li>• Recruit and train advice signposting volunteers to sustain the team at 18</li> </ul> <p>Maintain annual review with other advice agencies to share experience and good practice; and present results of Forum annual survey.</p>

## Section 4

**Planned areas of work, 2009 – 2012****C Local groups : To develop The Forum, with participation and activities, networked throughout the communities of Dumfries and Galloway.**

4.7 The Forum has always been a membership organisation, with groups of members well established and meeting regularly in nine localities across Dumfries and Galloway. It has been one of the important features of the Forum from its inception to have strong local roots across what is predominantly a rural region and in which there are many small communities each with their own character. Meetings of members take many different forms and some localities have a well-developed calendar. In all areas there are two strong threads to the activities – topic/issue based meetings and social support / contact. The two are often combined in a regular gathering of members, with a speaker or theme, plus time for catching up socially and enjoying talking with friends.

4.8 Local groups of members work within the Forum's purpose, under the Forum's framework of values and its umbrella of representing and supporting all senior citizens across Dumfries and Galloway. Local needs/issues, including representation, will always be referred through the Forum Officers (Chair, Vice Chair, Treasurer, Secretary) and/or the Executive Committee. To this end, over the years 2009-12, the Forum plans to increase its capability to ensure good communication between groups, across the whole and to-and-from groups and the Office in Dumfries.

4.9 It is intended to increase membership significantly and to support and increase local groups through creating the post of Forum Members and Groups Officer. This person will make a strong link to one Members' Representative (with an email link and a Forum laptop) in each of the groups and will lead the organisation of a twice yearly round of theme based meetings, designed to gather as well as give information (see also 4A).

4.10 There will continue to be a Forum newsletter and the website will be developed.

4.11 There has been demand for internet experience-sharing and training for senior citizens and the Forum will be offering this as part of membership.

4.12 In recognition of much feedback, hopes of recruiting more interest in its work from those aged 50-65, and trends elsewhere in Scotland, the Forum plans to remove the word Elderly from its name, replacing it with Seniors.

**Specific tasks and objectives**

2009-10	<ul style="list-style-type: none"> <li>• Publish two editions of the Forum newsletter and begin development of an electronic version.</li> <li>• Organise one round of theme based meetings (nine or ten)</li> </ul>
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	<ul style="list-style-type: none"> <li>• Seek funding for a laptop for each local group's Member Representative.</li> <li>• Explore ways of providing internet experience/training sessions and establish nature of demand. Pilot sessions.</li> <li>• Make formal arrangements and change the name of the organisation to Dumfries and Galloway Seniors Forum</li> </ul>
2010-11	<ul style="list-style-type: none"> <li>• Recruit and develop the post of Forum Members and Groups Officer.</li> <li>• Establish twice yearly round of theme based meetings for Forum local groups</li> <li>• Establish regular communication and a data collection process through Member Representatives with laptops, and share via website</li> <li>• Make newsletter part of website, whilst still retaining paper version. Publish three editions.</li> <li>• Increase membership, especially in the age range 50 –65, through a programme of events and action led by the Forum Members and Groups Officer.</li> </ul>
2011-12	<ul style="list-style-type: none"> <li>• Twice yearly round of theme based meetings for local groups</li> <li>• Publish quarterly newsletter</li> <li>• Maintain website with regular updates</li> </ul>

## Section 5

**Management, staffing and organisation 2009 – 2012**

5.1 The Forum works as an ever turning wheel with its rim out and about across Dumfries and Galloway, linking individuals and local groups of Forum members, and with spokes connected to the hub, at the Office in Dumfries. Its management, staffing and organisation must serve this structure, as well as the networks of organisations and agencies where its role is to represent senior citizens.

5.2 In these three years, 2009-2012, communication and resourcing are particularly important and especially, developing electronically and through networking. The Forum reduced its capacity in 2007 – 2008 in order to balance its books and is now seeking to grow again.

5.3 In future years it is hoped to have a structure that has employed staff in the three posts of Manager, Volunteers and Information Officer, Members and Groups Officer, and a volunteer Publicity Officer, all working closely with the Forum Officers (Chair, Vice Chair, Treasurer, Secretary) as governance. Local groups of Forum members will each have a Members Representative (with a laptop and individual email address) as their key link to the Office, staff and the Executive.

5.4 The Executive Committee will continue to provide a broad overview for the organisation from across Dumfries and Galloway. A review of its structure and capabilities, together with its role in leading representation that the Forum seeks to make, will be undertaken in 2009-10.

5.5 There will be a long-term need to plan for succession in Forum Officers. Also there will be a need to find slightly larger premises in Dumfries to enable staff and volunteers (including Forum Officers and the advice signposting service) to work side by side, providing services to support all that the Forum does.

**Specific tasks and objectives**

2009-10	<ul style="list-style-type: none"> <li>• Prepare job remits and seek funding for two new part-time posts : Volunteers and Information Officer and Members and Groups Officer.</li> <li>• Review and refine all job and role descriptions (staff and volunteers) to fit well with the Three Year Plan areas of work 4A, 4B and 4C</li> <li>• Review structure and capabilities of Executive Committee as it relates to the operations of the organisation – make recommendations for future, including governance and management meetings.</li> <li>• Establish annual cycle of governance and Three Year Planning (see also Monitoring and Evaluation)</li> <li>• Establish annual cycle of Forum events/meetings – local, across D&amp;G,</li> </ul>
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	<p>and in Dumfries – some supported by staff, some not, for the operations/activities/services of the organisation (see also 4A and 4C)</p> <ul style="list-style-type: none"> <li>• Establish volunteer recruitment and training needs, including publicity for this (see also 4B).</li> <li>• Seek new premises to relocate Office within Dumfries</li> </ul>
2010-11	<ul style="list-style-type: none"> <li>• Put in place recommendations for structure for governance and management meetings, based on review</li> <li>• Annual cycle of governance and Three Year Planning in place</li> <li>• Make Office relocation move</li> </ul>
2011-12	<ul style="list-style-type: none"> <li>• Continue annual cycle of governance and roll on Three Year Plan</li> </ul>

## Section 6

**Monitoring and evaluation**

6.1 Monitoring and evaluation are the means by which the Forum provides evidence of its work. Good quality monitoring enables the Forum to speak with an informed voice, on behalf of senior citizens.

6.2 In these three years, computer based systems will be established to monitor all the activities of the forum – membership, participation, and the proposals of this Plan. All monitoring activities will be within the limitations of Data Protection legislation. Monitoring will take the form of regular data recording together with six monthly summaries (see table below).

6.3 Once a year the Forum will undertake an opinion survey of senior citizens in Dumfries and Galloway. This will seek views from all the Forum's members and others aged over 50 on many aspects of health, welfare, occupations (including work, voluntary work, leisure interests), transport, and issues of concern. Over the years 2009-2012 the Forum will aim to increase the response levels of this survey and the publicity that its results receive (see also Section 4A).

6.4 The Forum will evaluate the work it does through a separate series of annual consultations and including a questionnaire. These will take place as part of the twice yearly round of theme based meetings and through contact between the Forum's Members and Groups Officer, each local Forum group and their Members Representative.

**Specific tasks and objectives**

2009-10	<ul style="list-style-type: none"> <li>• Establish systems/data collection for six monthly monitoring of this Plan and report to Executive Committee (August and February).</li> <li>• Roll forward this Three Year Plan following February monitoring report; adopt new Plan in March 2010, with new time horizon 2010-13</li> <li>• Establish annual opinion survey of senior citizens in D&amp;G – led by the Forum surveying its membership and others aged over 50. (see also 4A)</li> <li>• Monitoring of information and advice enquiries to the Forum .(see also 4B)</li> <li>• Establish new processes of annual Forum consultation with its members, to enable evaluation to become a regular annual activity.</li> </ul>
2010-11	<ul style="list-style-type: none"> <li>• Six monthly monitoring of this Plan and report to Executive Committee (August and February).</li> <li>• Roll forward this Three Year Plan following February monitoring report;</li> </ul>

	<p>adopt new Plan in March 2011, with new time horizon 2011-14</p> <ul style="list-style-type: none"> <li>• Annual opinion survey of senior citizens in D&amp;G – led by the Forum surveying its membership and others aged over 50. (see also 4A) Plan specific activities to increase numbers of people responding.</li> <li>• Monitoring of information and advice enquiries to the Forum .(see also 4B)</li> <li>• Annual Forum consultation with its members</li> </ul>
2011-12	<ul style="list-style-type: none"> <li>• Six monthly monitoring of this Plan and report to Executive Committee (August and February).</li> <li>• Roll forward this Three Year Plan following February monitoring report; adopt new Plan in March 2012, with new time horizon 2012-15</li> <li>• Annual opinion survey of senior citizens in D&amp;G – led by the Forum surveying its membership and others aged over 50. (see also 4A) Plan specific activities to increase numbers of people responding.</li> <li>• Monitoring of information and advice enquiries to the Forum .(see also 4B)</li> <li>• Annual Forum consultation with its members</li> </ul>

## Section 7

**Finance and funding**

For reasons of business confidentiality, detailed costings have been withheld.

Below is an estimated total over three years.

<b>COSTS</b>	2009-10	2010-11	2011-12
<b>TOTAL</b>	95521	107536	116288

## Section 8

**Risk assessment**

8.1 In line with good practice, the Forum will carry out an annual risk assessment of its activities and organisation. This will be commissioned by the Executive Committee in August each year and carried out by nominated members of the Executive Committee together with staff of the Forum and members of local groups, as appropriate. A report on the risk assessment will be made to the Executive Committee with recommendations for action. This will be formally minuted, including those actions agreed as being required to be taken, to mitigate risk in the forthcoming and following years. As and when the agreed actions are taken they will be reported to the Executive Committee, and minuted.

8.2 The scope of the risk assessment will include the following categories of risk (and any further items deemed to be significant at the time) :

Organisation – possible difficulties with / loss or lack of, membership, governance, staff, systems, policies, procedures, communication, ability to provide services, legal and employment matters, .....

Provision of services – possible difficulties with / loss or lack of, relevance, appropriate information, networking, levels of use, .....

Communication, profile and publicity – possible difficulties with / loss or lack of, goodwill, reputation, representation, IT systems, .....

Finance and funding – possible difficulties with / loss or lack of, security of funding, balance of funding sources, reserves, .....

Premises and venues for events – possible difficulties with / loss or lack of, health and safety, accessibility, Office space, .....

Each item in each category will be assessed for the nature of the risk involved, its likelihood and impact and the steps needed to minimise them.