

FIRST STOP CARE ADVICE SERVICE

Business Plan 2008 – 2011

EXECUTIVE SUMMARY



1 Introduction

This summary highlights the key features of a planned national care advice service for older people, their relatives, families and carers. The service is an initiative of four partner organisations: Counsel and Care, Elderly Accommodation Counsel, Help the Aged and NHFA Care Fees Advice. A copy of the First Stop Service business plan is available.

2 Aims of the First Stop Care Advice Service

The First Stop Service aims to become the UK's leading source of independent, clear and direct information and advice on any kind of care to older people. It will provide older people, their relatives and carers with information, advice and advocacy on their choices and rights across all aspects of care:

- care and support
- accommodation
- money and benefits
- how to complain.

3 Need for the Service

In May 2005, the Office of Fair Trading (OFT) issued a recommendation report called "Care homes for older people in the UK. A market study". The report highlighted a lack of awareness among older people about information sources, confusion about rights, a lack of transparency on pricing and care home fees and avenues of redress. The report recommended that the Government should establish a central information source or one-stop-shop for people to get information about care for older people. First Stop is designed to deliver this – and more. It will cover all forms of care, informal as well as formal; at home as well as in care homes. And by weaving in local partners it will provide access to face-to-face delivery, support and advocacy, as well as information and advice.

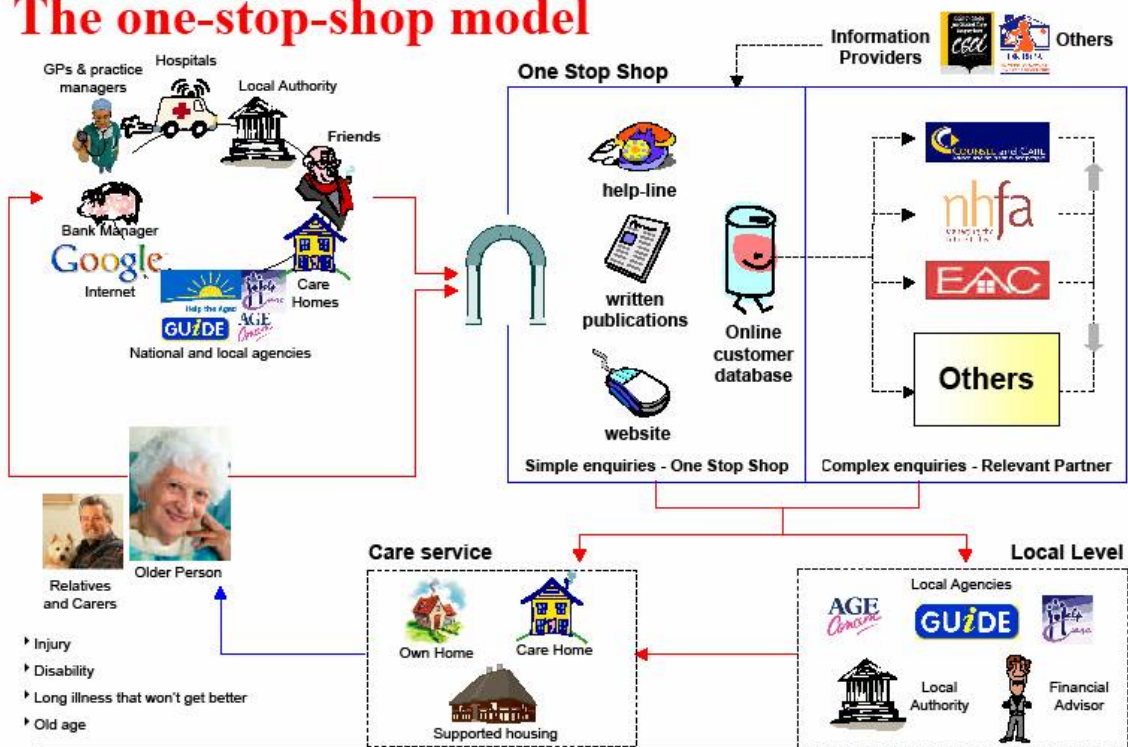
4 Service Delivery

First Stop will have a national core service comprising a national telephone helpline and website, together with local and regional partners providing a seamless service to the user throughout the UK. The content of the service will include:

- Care and support
- Accommodation
- Money and benefits
- Complaints & redress

Access to the service will be via a single freephone number, the First Stop Website or any of the local partner agencies.

The one-stop-shop model



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An online customer relationship management (CRM) system will enable all First Stop and partner staff to access and update customer records, and support the intelligent referral of customers between partners.

The First Stop website will provide access for First Stop staff and public alike to a library of information materials about all aspects of care for older people.

This will include:

- **Written materials**
- **Audio-visual materials**
- **Databases** of care services, care homes and supported housing

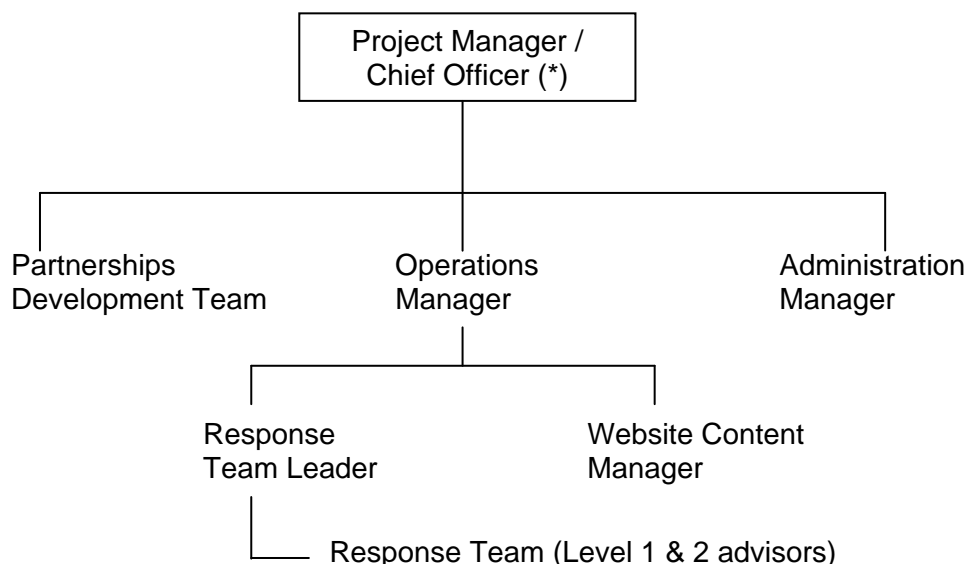
5. Monitoring and Evaluation

Monitoring and evaluation will be key to measuring the impact of the First Stop Service, attracting grant income and developing commercial income streams.

The CRM system outlined above will be designed to deliver both quality control information and market intelligence from the outset.

6. Structure

First Stop will commence as a collaboration between the 4 core partners, but with the intention of creating a separate charitable vehicle in due course. The planned staffing structure is shown below:



(*) See Appendices 1 and 2 for job descriptions

7. Market Reach

We estimate the total potential market at around 620,000 people seeking or receiving care each year, and our target is to reach 40% of these.

The First Stop Service will be available UK-wide from the outset, but during year 1 will only be promoted in one English region; then half the country by the end of year 2, and nationally by the end of year 3. The First Stop website will cover the whole of the UK from Year 1. Annual targets are shown below:

	Year 1	Year 2	Year 3	Year 4
Care info seekers	620,000	620,000	620,000	<i>620,000</i>
Total customers	44,500	95,000	177,500	<i>249,500</i>
Market reach	7%	15%	29%	<i>40%</i>

8. Budget

First Stop will launch with the majority of the funding required for year 1 in place, but with far less certainty for subsequent years. Income that is projected, rather than certain, is shown in italics in the table overleaf. Targets for new income generation are shown on the last line.

Stephen Burke (Counsel and Care)
 John Galvin (Elderly Accommodation Counsel)
 Daniel Pearson (Help the Aged)
 Philip Spiers (NHFA Care Fees Advice)

January 2008

Income & Expenditure 2008 - 2011				
	Year 1	Year 2	Year 3	Year 4
INCOME				
Partner contributions				
Help the Aged (contribution to pre-launch costs)	15.0	0.0	0.0	0.0
Help the Aged (contribution to staff costs)	56.0	10.0	0.0	0.0
NHFA (contribution to pre-launch & set up costs)	52.8	0.0	0.0	0.0
NHFA (contribution to staff costs)	34.6	86.4	205.2	265.7
NHFA (<i>profits ploughed back</i>)	17.4	114.8	265.1	487.9
Grants				
Big Lottery Fund	252.8	163.8	83.4	0.0
TOTAL INCOME	428.5	375.0	553.7	753.6
EXPENDITURE				
Switchboard/Level 1 service - staff costs	58.3	124.2	282.9	371.2
Level 2 service - staff costs	103.7	259.2	615.6	797.0
Project Manager / Chief Officer	49.9	49.9	49.9	49.9
Partnership development - staff costs	21.5	85.8	128.8	128.8
Operations Manager	0.0	0.0	46.4	46.4
Administration Manager	0.0	0.0	34.2	34.2
Website Content Manager	0.0	34.2	34.2	34.2
All other office costs incl. rent	116.6	276.7	596.0	730.9
Marketing expenses	30.0	50.0	150.0	100.0
Pre-launch costs	36.0	0.0	0.0	0.0
Sub total expenditure	415.9	880.0	1,938.0	2,292.6
One-off set up costs				
Website/CRM/phone system - development & installation, including pre-launch costs	70.0	0.0	0.0	0.0
Website/CRM/phone system - maintenance & upgrades	0.0	20.0	20.0	0.0
Legal & Professional	10.0	10.0	0.0	0.0
Premises set-up & Equipment	0.0	30.0	0.0	0.0
Level 1 + Level 2 set up costs & training	0.0	15.0	15.0	10.0
Total one-off set up costs	80.0	75.0	35.0	10.0
TOTAL EXPENDITURE	495.9	955.0	1,973.0	2,302.6
Deficit / target for new income generation	-67.4	-580.0	-1,419.2	-1,549.0



JOB DESCRIPTION

Title of Post:	Project Manager
Hours:	Full-time
Salary:	£45,000 to £50,000
Line Managed by:	Chief Executive of EAC
Responsible to:	Project Management Group

PURPOSE OF POST:

- To ensure the effective delivery of a national information and advice service to older people and their representatives on issues relating to their care and housing needs.
- To manage the development of all components of the national web-based and telephone information and advice service
- To manage the development of the service in London and the South East in the first year, to 50% of the country in year 2 and across England in year 3, aiming for a UK wide service in year 4.

JOB RESPONSIBILITIES

1. Produce and monitor a project plan for the development of the service
2. Progress chase, and ensure those delivering services or goods for the service, deliver on time and at agreed cost
3. Market the service in the region(s)
4. Act as co-ordinator between partner organisations
5. Produce and review monthly performance management information
6. Keep financial records and monitor the budget for the service
7. Liaise with contractors and funders and provide monitoring information and reports as required
8. Monitor performance against contracts and targets and address any issues identified
9. Provide the Project Management Group with quarterly performance management and financial management information
10. Service and report to the Project Management Group and Chair the Operations Management Group

JOB DESCRIPTION

11. Ensure the effective communication of the brand throughout the First Stop Care Advice service
12. Ensure that up to date, quality information and advice is provided to users via the web and telephone based services
13. Ensure that partner organisations deliver to the service standards and service specification agreed
14. Develop and monitor systems and procedures to ensure the effective delivery of the service and address issues of non-performance
15. Ensure that staff delivering the service receive training on systems and procedures and on subject areas impacting on older people and their care needs
16. Obtain users' views of the service to inform service development
17. Liaise with policymakers and key stakeholders, identify and progress opportunities for developing the service, including fundraising for the service
18. Ensure the service complies with legislation and regulation
19. Build and develop a team, recruit and manage staff as required
20. Develop the managerial structure of the service
21. Attend meetings and travel to regions as required
22. Carry out any other duties commensurate with the post.



JOB DESCRIPTION

Title of Post:	Chief Executive Officer
Hours:	Full-time
Salary:	Up to £60,000
Line Managed by:	Chief Executive of EAC (initially) / First Stop Board
Responsible to:	FirstStop Project Management Group / First Stop Board

FirstStop's Business Plan envisages FirstStop becoming a legal entity during its second year of operation, the employment of addition advisory and partnership development staff, and a need to attract substantial investment from statutory, charitable and commercial sources to enable the service to roll out nationally by 2010-11.

Subject to performance, it is our intention to offer the position of FirstStop Chief Executive Officer to the FirstStop Project Manager at the end of a 6 month probationary period.

PURPOSE OF POST:

- To manage the development and delivery of all central components of the FirstStop service to older people and their representatives.
- To develop regional and local components of the service in partnership with other agencies.
- To secure income streams to fund a sustainable service.
- To help ensure that FirstStop achieves its aim of becoming the UK's leading source of independent, clear and accurate information and advice on all forms of care for older people.

JOB RESPONSIBILITIES

The job is an extremely wide-ranging and demanding one, and the scope for paid staff support initially limited. The current budget provides for recruitment to the post of a Partnership Development Officer at mid year, but the appointed Chief Executive may wish to review how best to use the resources available. The budget also contains provision for buying in services.

We envisage the main responsibilities during the first year in post as:

- To help identify and to create the appropriate legal framework for the FirstStop partnership, and help refine a business model that complies with all relevant statutory, legal and regulatory requirements, and is at the same time enterprising and successful.

JOB DESCRIPTION

- To build on groundwork done by the Partners and secure additional statutory, commercial and/or grant income to fund full roll-out of the service.
- To engage with potential service delivery partners, sponsors and funders at regional and local levels towards creating a sustainable, integrated and high quality information, advice, advocacy and support network, to meet the needs and preferences of all potential customers.
- To develop senior level contacts and networks to promote and gain support for FirstStop in Government, Local Authority, voluntary and business sectors.
- To manage and help shape the relationship between FirstStop and its owning Partners, including their contributions to its service delivery. To work with and support Partners' Advice Service Managers in delivering their contributions to FirstStop.
- To plan, recruit, train and line manage a dedicated FirstStop staff team.
- To ensure compliance with all contracts and undertakings entered into by FirstStop, or entered into on behalf of FirstStop prior to it becoming a legal entity.
- To promote and market the service to the public, and help to ensure that it meets those targets and milestones that form part of our grant contract with the BLF.
- To report regularly to the Project Management Group on service performance, finances and any other matters of importance or concern.
- To engage with the Project Management Group, as heads of the agencies delivering the core FirstStop service, and their respective Service Managers, to help create a dynamic for constant improvement in the quality, scope, reach and accessibility of the service, and in its reputation.