

NHS Retirement Fellowship 10 Year Strategy – A Discussion Document

Where are we now ?

Membership

- Some branch closures/others not motivated to actively recruit.
- Slightly declining membership/high age profile.
- Increase in National/postal membership associated with membership application forms available via Pension's Agency for newly retiring NHS staff.
- Some newly retired staff opt not to join, having explored the possibility, or choose not to join branches with aging membership.
- Fellowship membership becomes more attractive 2 or more years after retirement.

Finance

- No recurrent income/only interest on dwindling capital from previous England grant. Grants secured in 2008/9 for NI, & Wales. Report to Scottish Health Executive being prepared towards Scottish grant.
- Gift aid
- Lottery launched.
- Increase in membership fee from 1 April 2008.
- Branch efforts include gift aid, bring & buy sales, raffles.
- Members pay for individual activities including Annual Conference/Holiday.
- Economies in Central Office, but pressures from rising costs eg postage, travel.

Staffing/Central Office

- Peaks & troughs of workload at Central Office- staffing levels questioned at National Council.
- Office facilities at Charminster on "grace & favour" basis-vulnerability.
- No Development Officer-North of England.

Benevolent Fund

- Strong Fellowship principle to support "members in need" Members can apply for financial support towards overcoming hardships.
- Initiative to try and establish an NHS Benevolent Fund.

Profile

- Many in NHS still ignorant of existence of NHS Retirement Fellowship.
- Web-site upgraded.
- New DvD.
- Articles in Professional Journals/Women's Institute.
- Meeting with Workforce Director, DOH. Link person sought.
- Some branches experiencing less support from local NHS Trust.

Activities.

- Most branches have guest speakers, & outings, and some branches include walking, and other sports, theatre trips, holidays with some overseas trips.
- Annual Conference/Holiday-difficulty in pitching event so it is affordable to significant numbers. Venue, and accessibility are critical. Look for good amenities and local attractions.
(Conferences and other national gatherings in NI, Wales and Scotland are subsidised or free to set numbers of members.)

Where do we want to be ?

Membership.

- 20,000 plus members with a rising trend.
- A 5% net increase in branches over 5years.
- More open support from DOH, Strategic Health Authorities and NHS Trusts and Primary Care Trusts for the Fellowship, encouraging membership to those due to retire, and supporting local branches.
- Facility/process to sign up enquirers at time of initial contact.
- Improved benefits for National/postal members eg trade discounts, targeted events, good communications.

Finance

- Annual Grant from DOH in England. Continuing grants from other home countries Health Departments.
- 2000 regular lottery participants, to net £30,000 pa for the Fellowship..
- Minimum of 5% of NHS Trust/PCTs staff donating regularly to Fellowship funds.
- Uptake of gift aid by membership on their subscriptions, towards 100% of those eligible to offer it.
- Fellowship wide commitment to “cost of living” subscription rises (to be kept as low as possible, by National Council.)

Staffing/Central Office

- Development Officer-North of England to be replaced. All other Development Officer posts to be continued.
- All staff to have focus and direction in their roles and to be able to explicitly articulate improvements/progress to the Fellowship at large.
- Where there are identified staff training needs to address these within each year.
- Secure all staffs security of tenure through improved financial position.

Benevolent Fund

- To be playing an integral part in the management of an NHS Benevolent Fund, through Fellowship membership on an NHS Benevolent Fund Trust Board.
- To have welfare staff employed by the NHS Benevolent Fund Trust Board to supplement branches support for members with financial and health problems.

Profile

- Maintain a Newsletter of high quality, easy to read, with good content and a UK wide Fellowship readership and contributors. Made available in NHS staff rest rooms and HR Departments.
- Make the update of the Web-site and the DvD a continuous process. More branches to have linked web-pages to encourage inter-communication about issues such as ideas for guest speakers and other branch activities
- Articles regularly published in Professional journals/ relevant publications.
- Maintain a link with the Workforce Directorate, DOH, and consider also links to Strategic Health Authorities.
- All Fellowship leaflets kept up to date and widely available to the NHS. HR Departments send our literature as a matter of routine to retiring NHS staff.
- At least 20 pre-retirement courses run in NHS organisations by the Fellowships training partners each year.
- All NHS organisations that appear uncooperative to Fellowship branches are approached towards “building bridges” and establishing an effective relationship.

Activities

- Regular training events offered to branch officials/members towards helping branch administration and enjoyment of the Fellowship.
- Annual Conference/Holiday is subsidised to encourage higher attendance at the AGM and to improve the enjoyment of the event.
- Some events are targeted at National members as part of the Fellowship calendar.

How will we get there?

Membership

- Branch members to re-double efforts to recruit colleagues, friends, and acquaintances.
- Recruitment drives through local radio, local press, contact with NHS Trust and PCT Human Resource Departments, library publicity and presence at fund raising events.
- Use “Introduction Cards”.
- Central Office to go back to enquirers who have not joined 2 years on, to invite them to consider membership again.

- Encourage membership from amongst health voluntary organisation members eg League of Friends, WRVS etc.
- Establish a way of tying up membership to the Fellowship when initial enquirers telephone expressing an interest.
- Seek support from local NHS Trusts, PCT's , and via Director/Development Officers with Strategic Health Authorities.

Finance

- Director and Patron to pursue the establishment of a regular DOH grant with the national Workforce Director for Health & Social Care.
- Annual Reports on Fellowship activities in Scotland to be promptly submitted to the Scottish Executive towards securing an annual grant for the Fellowship in Scotland.
- Development Officers in Northern Ireland & Wales to continue ongoing dialogue with their Health Departments towards securing ongoing annual grants for the Fellowship in their home countries.
- Maintain publicity about the lottery. Seek support from branches to widen the net of participants to friends, acquaintances, and NHS staff.
- Get “pilot” NHS Trusts to approach their workforce for staff contributions to the Fellowship. Seek DOH and Strategic Health Authority support to approach the wider NHS workforce for contributions to the Fellowship.
- Propose the establishment of legacies to the membership, and others who have worked in the NHS, to the benefit of the Fellowship. Advertise in the Newsletter, Trust Staff Newsletters and the Legal Press.
- Propose 3 yearly “cost of living” rises in the annual subscription to the AGM.

Staffing

- Set all staff specific objectives, and offer training where this is deemed to help enhance their contribution.

Profile

- Keep the layout, content and distribution of the Newsletter under constant review. Consider an Editorial Board to support the Editor.
- Establish a Review Group to keep the Web-site and DVD under scrutiny, in the interest of keeping them up to date, informative and of high quality.
- Aim to submit one article per month to professional journals and periodicals.
- Director/Patron/ Chairman to meet with NHS Workforce Director once per year, and to seek a financial and input contribution from the Centre to the Annual Conference.

- Director/Development Officers to contact each Strategic Health Authority once per annum to maintain our profile at “ health planning level”.
- Review Fellowship printed leaflets every 12 months towards keeping them up to date, and to ensure that NHS Trusts/PCT’s have ready access to our appropriate material.
- Development Officers to market our Pre-Retirement Courses with Health Organisations at every opportunity. Consider ways to discount the cost to Trusts towards increasing their interest in running these events with our training consultant partners.
- All branches to have a ready contact (usually the Development Officer) to provide immediate follow up in the event of experiencing difficulty in the relationship with NHS Trust/ PCT officers.

Activities

- Organise training events/ “get togethers” , every year for branch officers/members towards sharing experiences and reviewing the workings of the branch.
- All newly accrued income to be earmarked to improve branch programmes and the Annual Conference, for the benefit of all members.
- At least one event each year to be tailored for the benefit of National/postal members.
- Establish a specifically planned overseas holiday at preferential rates for members through our sponsors Saga Travel.

Mike Brown
Director.

October 2007.