

Active Retirement Ireland



Strategic Plan

2012 – 2014

Introduction

Active Retirement Ireland (ARI) is a voluntary organisation for older people with a national membership of 23000 people and over 526 local associations. The organisation's rate of growth has been constant with a growth of 30% in 4 years. Members age range from 50 -100 years and cover a range of socio-economic backgrounds.

The organisation is run by voluntary committees at local, regional and national level giving approximately 4200 volunteers¹ working in the organisation. The organisation is structured regionally through 8 regions whose role is to bring the local associations together for information, training, seminars and activities. Each region has a voluntary development officer whose role is to support existing local associations, support the development of new associations and represent the region with agencies. Each of the 526 local associations is run by a committee of volunteers. These are self-organised and independent local groups whose members decide the activities on offer. The process used is based on the community development model of people being empowered to do things for themselves.

All the activities are aimed at keeping older people active and well.

Active Retirement Associations are a lifeline for many older people who would otherwise feel isolated and lonely.

At national level through the work of the organisation ARI aims

- To promote older people as independent, self-organised and active members of their communities.
- To act as a voice for older people and their concerns at national level.

¹ Each local association has a committee of approximately 8 members and each regional committee has a committee of at least 9 members also.

- To promote positive ageing attitudes in Ireland
- To provide training, support and information to the local associations of older people in our eight regions
- To network the local associations for peer support, capacity building and information sharing

The National Executive Committee is voluntary and comprises of 10 members elected by the membership at AGM and the 8 regional chairs. The Board of the limited company Active Retirement Network Ireland has the 10 elected members as directors.

Rationale

The organisation under- went a complete review in 2008 and developed a five year strategic plan 2009 – 2013 outlining a clear purpose with definite outcomes to be achieved. The five year plan became the road map for the development of the organisation.

In June the National Executive Committee participated in a two day workshop to review the strategic plan in light of the mid way evaluation findings of the current plan. This process also included work from ARI subgroup on development and staff inputs.

Following lengthy discussion it was agreed to develop a new three year plan for the organisation as the environment in which the 2009 plan was developed has significantly changed.

Strategic Plan 2012 - 2014

Active Retirement Ireland-

Mission

ARI is an attractive and inclusive membership led organisation for older people, which supports members to realise their full potential

Purpose

The purpose of Active Retirement Network Ireland is to enable retired people enjoy a full and active life and advocate for them.

Strategic Outcomes 2012-2014

The strategic outcomes for 2012-2014 are;

1. Be an organisation that people would be proud to be part of locally, regionally and nationally.
2. Be a recognized voice for retired people on social, health, learning and economic issues in collaboration with other organisations.
3. Work towards becoming a self sustaining organisation.

Objectives of the plan

The plan will provide direction for the organisation and assist in sourcing the costs of implementing phase 2 of the strategic plan of Active Retirement Ireland over a 3 year period.

The plan will be implemented under the three core strategic outcomes and will focus on membership development, skills and leadership, sustainability and collaboration.

Environmental Context

In an Ireland where.....

- ❑ The number of older people and those living alone is rapidly increasing (11.4% of population is over 64 years of age, increasing to 14.1% by 2021²).
- ❑ Active Retirement Ireland is the largest voluntary membership organisation for older people with a current membership of 23,000 (4.2% of the over 64s)
- ❑ The level of abuse³ towards older people is rising
- ❑ Health services and care for older people are inadequate and current cost cutting measures are impacting greatly on older people

² TILDA 2011

³ Elder abuse is defined by Department of Health and Children as “a single or repeated act or lack of appropriate action occurring within any relationship where there is an expectation of trust which causes harm or distress to an older person or violates their human and civil rights”.

- ❑ Lack of both a legislative and policy framework at Government level for older people
- ❑ Older people can sometimes be invisible and their experience and past contributions may not be fully appreciated
- ❑ Fear and apprehension of growing old is very real due to ageism and negative images of ageing
- ❑ Pensions may not be able to meet rising costs due to global and national economic failure
- ❑ Depression is the most common mental illness among older people⁴

Active Retirement Ireland (ARI) is committed to supporting a community development approach to the long term sustainability and empowerment of its member associations through the benefits of ensuring the local, regional and national volunteers and potential volunteers have the skills, knowledge and confidence to function well and promote a participative, healthy and active lifestyle for older people. Through networking, ARI knows that the members learn from each other, get new ideas on activities and build solidarity with each other. This is essential if the organisation is to be a strong voice in the ageing sector.

ARI believes that the members should be at the centre of any development process but we also recognise the need to work in parallel with agencies, other voluntary organisations and the wider community to promote a development approach to ageing.

⁴ www.olderinireland.ie

The 3 year strategic plan for Active Retirement Ireland used a development approach from the beginning. The local members were the main target group consulted through the evaluation process along with external agencies and funders.

The National Executive Committee finalised the plan and will communicate the final draft to the members at upcoming regional meetings.

The 3 year strategic plan is about task and process;

- the task is the achievement of an organisation that is responsive to members' needs and is linked to social change,

- and the process is the application of membership development and skills building to achieve participation, voice and sustainability of our organisation in a coordinated and structured way.

The overall outcome will be to have an organisation that is embedded in the needs and expectations of the members and a model of good practice of the participation of older people in developing responses and activities suited to their needs.

Active Retirement Ireland Development Roadmap

Phase 1 2009 - 2012

Topic	2009	2010	2011	2012	
Overall Theme	Consolidate and Fix	Continue to consolidate with focused growth	Accelerate growth	Consolidate external profile and begin planning for 2014+	

Note: Year on year, themes are cumulative in other words you retain Year 1 in Year 2.

Phase 2 2012 - 2014

Topic	2012	2013	2014		
Overall Theme	Strengthen current position of ARI in Ageing sector locally & nationally	Continue to consolidate position with focused growth	Accelerate positioning of organisation		

Strategic Outcome 1	Strategic Objectives	Actions	Indicators
<p>Be an organisation that people would be proud to be part of locally, regionally and nationally</p>	<p>To ensure ARAs are vibrant and relevant local organisations that are embedded in the community</p>	<p>ARAs to undertake a planned consultation process with the broader local community to create awareness of the organisation</p>	<ul style="list-style-type: none"> ✓ Community defined ✓ – ✓ Messages and Channels identified
		<p>Engage with other local organisations to create a collective range of local activities for older people</p>	<ul style="list-style-type: none"> ✓ Consultation developed ✓ Implement a partnership action
		<p>Raise the profile of the organisation at a local level through the use of local media with a view to attracting new male members.</p>	<ul style="list-style-type: none"> ✓ Increase and improve channels for messages
	<p>Ensure ARI regional structures actively support and empower local ARAs to meet the needs of their members</p>	<p>Provide members with mechanisms for developing internal communications across the organisation</p>	<ul style="list-style-type: none"> ✓ Level of participation in committee training ✓ Evidence of role of ARA in community
		<p>Establish the “clusters” model as a means of broader access to activities and expertise for ARA members</p>	<ul style="list-style-type: none"> ✓ Regional roll out of cluster model ✓ Regional events planned and delivered
		<p>Organise region specific events to increase engagement, interaction and learning between neighbouring ARAs</p>	<ul style="list-style-type: none"> ✓ Membership participation in training
		<p>Build on the working group model of planning for inclusion of more members in the decision making structures of the organisation</p>	<ul style="list-style-type: none"> ✓ Evaluation of members access to structures and information
		<p>Review existing mechanisms to ensure local and regional structures provide appropriate means and opportunities to influence and monitor national activity</p>	<ul style="list-style-type: none"> ✓ National campaign to raise profile developed ✓ Structures reviewed ✓ and measured against members needs
			<ul style="list-style-type: none"> ✓ Working group model embedded

	<p>ARI is operating at a national level in line with the aims and ambitions of its local members</p>	<p>Undertake a national campaign to raise the profile and awareness of the objectives and activities of ARI</p>	<p>in organisation</p> <p>✓ Participation of members at national level</p>
		<p>Ensure the professional delivery of national events for greater inclusion and communication.</p>	

Strategic Outcome 2	Strategic Objectives	Actions	Indicators
<p>Be a recognised voice for retired people on social, health, learning and economic issues in collaboration with other organisations</p>	<p>Continue to advocate on the critical issues directly effecting the members</p>	<p>Systematically consult with the membership to identify and confirm the key issues effecting them Support ARAs to engage with local decision making structures</p>	<ul style="list-style-type: none"> ✓ Effective consultation mechanisms in place ✓ Measure change in issues of members ✓ Targeted campaign developed with O & B ✓ Collaboration work measured using members ✓ Greater awareness of partner organisations ✓ Leadership training evaluated and impact measured ✓ Research on impact of social network completed ✓ Evidence used within organisation ✓ Evidence gathered from A & O on impact of physical activity ✓ PR and profile raised ✓ Newsletters ✓ Website relevant ✓ National campaign to raise awareness developed with O & B ✓ New media participation increased ✓ Better local voice developed for Participation in county structures ✓ Participation of members on national campaigns
	<p>Build evidence of the impact of ARI on healthy ageing</p>	<p>Develop a targeted advocacy campaign that highlights and addresses the needs of members of ARI and older people in general</p>	
		<p>Deliver leadership training through the regional structure on profiling the local associations.</p>	
	<p>Using the strength of our membership, in conjunction with other organisations, ensure Government develops and implements a National Positive Ageing Strategy for older people</p>	<p>Plan an effective external PR campaign on key themes as identified by membership</p>	
		<p>Research the role of social networking in promoting healthy lifestyles and well being of older people in Ireland using ARI as a case study Appendix 1</p>	
		<p>Continue to play an active role in existing structures such as Older & Bolder, and Ageing Well Network in ensuring the development and implementation of a NPAS and the Age Friendly county initiative</p> <p>Identify new potential collaboration partners</p>	

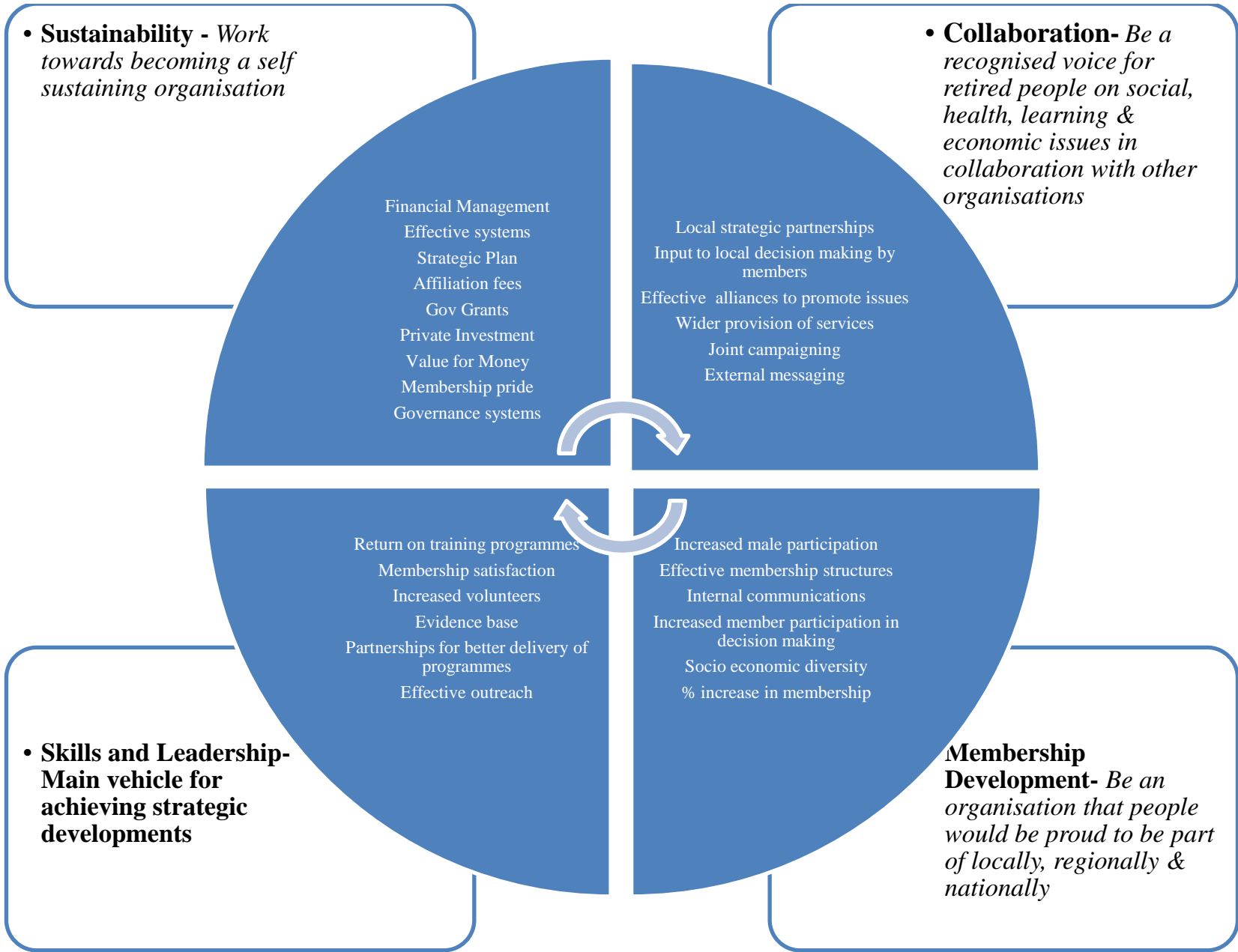
Strategic Outcome 3	Strategic Objectives	Actions	Indicators
Work towards becoming a self sustaining organisation	Develop programmes that champion and celebrate volunteerism	Develop annual funding plans that look to increase revenue generation whilst reducing operational costs	✓ Pride measured with members
		Plan and implement the National Development and Outreach Plan Appendix 2	✓ National Development & Outreach plan implemented and impact tracked
	Ensure ARI possesses and implements the best IT/ Communications, HR and financial management systems and practices	Provide up to date IT systems and training to relevant personnel	✓ Highly trained volunteers in place at regional level
		Review existing mechanisms of communication throughout the organisation and examine opportunities to develop new channels e.g. social media etc. Evaluation progress of plan	✓ Joint collaboration programmes in place with A & O, 3 rd AGE, VECs ✓ HR systems reviewed ✓ IT systems updated
		Review existing H.R. and financial management systems and practices to ensure they reflect best practice	✓ Governance training in place ✓ Resource manuals developed
		Develop appropriate governance training and support tools manuals for dissemination across the organisation	✓ Private sector investment plan in place ✓ Investment from funding strategy secured
		Provide best practice governance training at national, regional and local levels	✓ Affiliation fee increased ✓ Collaboration targets identified
	Ensure consistency in governance best practice throughout the organisation Work with other organisations to achieve our objectives	Review current partnership arrangements to ensure they continue to support the achievement of our vision.	✓ Joint programmes in place
		Implement the fundraising strategy for ARI Appendix 3	✓ Current programmes such as Go For Life, Ageing with Confidence expanded
		Continue to provide information and support to the local and regional structures	

The long-term outcomes from the strategic plan 2012 -2014 will be to grow the organisation to respond to members' needs as well as the changing environment of ageing in Ireland. This will be done by building on the current range of programmes.

In conjunction with this work ARI will undertake to commence three new projects in year 1;

It is important that at the end of the 3 year plan that ARI is positioning itself as self sustaining both financially and with a strong and skilled voluntary base.

- Plan and implement the National Development and Outreach Plan which will increase our voluntary development team from 9 to 40. This project will include a 20 week training programme . ARI will work in partnership with Age & Opportunity and other organizations on this. The role of the new development team will be to encourage new associations to be set up and outreach into communities not engaging with ARI. *See Appendix 2 attached*
- Develop research on how being socially connected promotes a healthier lifestyle and wellbeing in older people in Ireland. *See appendix 1 attached*
- Develop a long term sustainable relationships with the private sector for future funding. *Appendix 3 attached*
- Deepen our collaborative working relations with Age & Opportunity, 3rd Age, Older & Bolder, Age Friendly County, AONTAS, GAA and other organisations.
- ARI as the largest community based organisation for older people in Ireland is committed to leading the development of the Ageing sector with other organisations.



• **Sustainability** - Work towards becoming a self sustaining organisation

Financial Management
Effective systems
Strategic Plan
Affiliation fees
Gov Grants
Private Investment
Value for Money
Membership pride
Governance systems

• **Collaboration**- Be a recognised voice for retired people on social, health, learning & economic issues in collaboration with other organisations

Local strategic partnerships
Input to local decision making by members
Effective alliances to promote issues
Wider provision of services
Joint campaigning
External messaging

• **Skills and Leadership**- Main vehicle for achieving strategic developments

Return on training programmes
Membership satisfaction
Increased volunteers
Evidence base
Partnerships for better delivery of programmes
Effective outreach

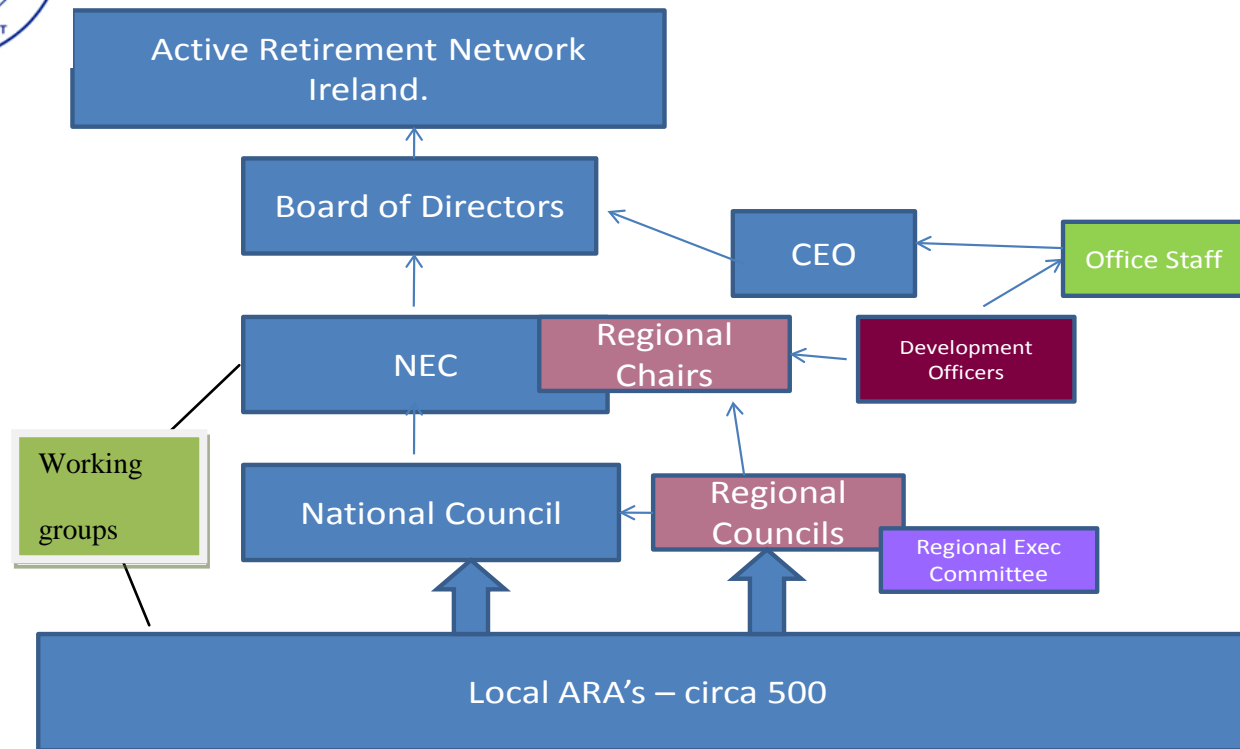
Membership Development- Be an organisation that people would be proud to be part of locally, regionally & nationally

Increased male participation
Effective membership structures
Internal communications
Increased member participation in decision making
Socio economic diversity
% increase in membership

Strategic Plan Implementation Structure



Current Structure



Current staffing and core grant information

ARI currently has 5 fulltime staff members;

- Maureen Kavanagh – CEO
- Maria McMullen - Office Manager
- Helene Boran - Financial Administrator
- Peter Kavanagh - Information & Networking Officer
- Susan Shaw - National Development Officer
 - Maire Sexton assists with the clerical work on a temporary basis

In 2011 funding came from Health Service Executive (HSE) grant given on a yearly basis, Dept. of Environment, Community & Local Government grant for three years from 2011 - 2013, Affiliation fees. Sponsorship

To implement the 3 year strategic plan to its best potential, ARI will seek support and resources in the areas as outlined in the strategic plan;

Governance of ARI

The 2011 National Executive Committee and Board members are;

- **President:** Tom O'Mahony Wicklow ARA,
- **Vice President:** Michael Cogan Baltinglass ARA
- **Secretary:** Mary Daly Bunbrosna/Multyfarham ARA,
- **Treasurer:** Nancy Tynan Thurles ARA

Committee members:

- Phyllis O'Halloran, Co Limerick Civil Defence ARA; Eithne Carey Renmore ARA, Brendan Woulfe Newcastle West ARA, Pat Stanley Dun Laoghaire ARA, Jim Behan Ballyduff ARA

The above are also the directors of the board of the company limited by guarantee – Active Retirement Network Ireland

- **Chairs of the Regional Councils:**

- Jean Cole Eastern Region; Mollie Hyland Mid West Region; Nancy Hegarty Southern Region; Susan O'Connor South East Region; Jean De Cleir Western Region; Tom Finnerty Midland Region; Oliver Ward North East region; John Deasy North West Region.

The Board of ARNI comprises of the 10 members of the NEC who are elected at AGM. The NEC comprises of the 10 elected members and the chair of each of the regions.

The board has fiscal and administrative responsibility while the NEC provides leadership and strategic direction for the organisation.

The National Executive Committee may set up Regional Councils of Active Retirement Ireland, as required.

- The Chairperson of a Regional Council shall be an Ex-Officio member of the National Executive Committee, with voting powers.
- The regional committee will consist of The Chairperson, Vice-Chairperson, Secretary and Treasurer, and not less than three ordinary members elected at the Regional Council Annual General meeting, together with the Development Officer/s, without voting power.
- Subject to the jurisdiction of the National Council a Regional Council shall promote the objects of Active Retirement Network Ireland by organising activities, developing existing Associations and setting up new ones in the area. For this purpose, a Regional Council may appoint Development Officer/s.
- A Constitution as approved by the National Executive Committee shall be adopted by each Regional Council.

- Quarterly budgets are to be submitted to the Board, Reports are submitted to NEC meetings by the Chair.

No member of the Regional Committee may serve for more than six consecutive years and no member may hold an officer position for more than three consecutive years

Regional Structure

8 Regions

The Eastern Region –

Dublin, Wicklow & Kildare	104 ARAs
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The Mid Western Region –

Limerick, Clare & North Tipperary	52 ARAs
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The Midland Region –

Westmeath, Laois, Offaly & Longford	54 ARAs
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The Southern Region –

Cork & Kerry	78 ARAs
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The South East Region –

Wexford, Waterford, Kilkenny, Carlow & Tipperary South	67 ARAs
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The North East Region –

Cavan, Monaghan, Louth & Meath	46 ARAs
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The North West Region –

Leitrim, Sligo & Donegal 48 ARAs

The Western Region –

Galway, Mayo & Roscommon 78 ARAs

Risks

Financial risks; Active Retirement Ireland continues to be dependent on the funding made available from the Health Service Executive, Department of Environment, Community & Local Government, other sponsors and support of membership through affiliation fees.

Legal risks: having knowledge of and compliance with company law and the Charities legislation

Operational risks: Ensuring that the human resources of the organisation are adequate and have the skills, knowledge and expertise required.

Reputational risks: ARI has a good reputation as a membership led organisation and this reputation must be protected by supporting best practice at all levels.

ARNI is committed to the following sustainability plan;

Sustainability plan outcomes 2012 - 2014

Strand 1

Affiliation fee increased by 100% by 2015 (€5 per member to €10 per member)

It is important to note that members of the organisation pay a local membership fee along with the affiliation fee to the national organisation.

Strand 2

Skill and resource building embedded in volunteers who will support the growth of membership from current 4.1% of over 65s to 6% by 2015

Strand 3

Image and awareness of impact of ARI on the health and well being of older people evidence to be used to attract Government funding as preventative mechanisms to ensure many older people remain in the 96% who are living at home.

Strand 4

Investment and sponsorship by external bodies and private sector companies and individuals.

Evaluation

ARI will put in place a formative evaluation process during the implementation of the 3 year plan to ensure actions are achieving the mission and purpose of the organisation.

This process will begin in year 1 of the plan with a final report being available to the organisation by mid 2014.

The evaluation will be outsourced for better transparency.

The evaluation process will inform the operation plans of ARI to allow for completion or change as required.

Draft terms of Reference include:

- Assess progress made towards achievement at output level
- Determine are the results contributing to ARI's overall mission
- Assess the reasonability of the relationship between activities, costs and results
- Identify lesson learned and provide recommendations for guiding ARI board and management under activities and desired outputs
- Provide a measurement tool to funders on achievements and changes to outputs if needed.

Appendix 1

Brief summary research proposal for Active Retirement Ireland 2012

Purpose: Exploring the impact of participating in Active Retirement Ireland as a social network on adopting healthy lifestyles and enhancing well-being in older people in Ireland.

Research questions:

1. What is a healthy lifestyle for older people?
2. Does involvement in a social organisation such as Active Retirement Ireland promote a healthier lifestyle and/or enhanced well-being in older people?
3. If so, what are the processes through which well-being is enhanced?
4. To what extent is Active Retirement Ireland achieving its central aim of encouraging healthier lifestyles and enhancing well-being?
5. What are the next steps for Active Retirement Ireland in furthering this aim?

Methodology

Literature review to include;

- Contextualising the aims and operation of Active Retirement Ireland
- Selective review of international policy frameworks and guidelines (including those of the WHO and the UN) and EU research on the relationship between a healthy lifestyle and keeping active mentally, physically and socially in older people.
- An overview of existing HSE services for older people
- A review of Irish-based research on healthy ageing including the findings from The Irish Longitudinal Study of Ageing (TILDA).

Quantitative research: A postal questionnaire of all members of Active Retirement Ireland in order to evaluate the impact of membership/participation in programmes on their health and well-being.

Qualitative research:

- 8 focus groups will be conducted (one in each region) with ARI members and leaders to
- 30 interviews will be conducted with ARI members (15 in an urban and 15 in a rural area)
- These focus groups and interviews will elicit an understanding of the process by which participation does or does not lead to a healthy lifestyle

- A further 10 interviews will be conducted with non-members and former members of an ARA to investigate the barriers to participation.

A steering group will be established to oversee and advise on the research

Objectives

Identify the key elements in social network involvement that may lead to a healthier lifestyle and better well being in older people

Gain an understanding of whether and how being socially connected and involved in activities work to promoting healthy lifestyles and wellbeing.

Get an overall description of the operation and activities of Active Retirement Ireland which will be useful in determining its future direction

Outcomes

Gain an understanding of the potential role of a social movement in impacting on wellbeing and healthy lifestyles in older people.

Present a documented case study on ARI as a social movement and evaluate its impact on older people.

Produce findings to inform policy on health promotion and positive ageing in Ireland.

References

Swedish National Institute of Public Health (SNIPH) (2007), *Healthy Ageing: a Challenge for Europe*, Brussels [Stockholm], www.healthyageing.nu

United Nations, 2010, *Strengthening Older People's Rights: Towards a UN Convention. A resource for promoting dialogue on creating a new UN Convention on the Rights of Older Persons*

World Health Organisation (2002), *Active Ageing: A Policy Framework*, Geneva, World Health Organisation.

Appendix 2

National Development and Outreach Programme

AIM

- To create awareness and understanding of the potential of the ARI model at local, regional and national level
- To support the increase in membership and inclusivity in ARI

FOCUS

- Current members
- Younger people (45+) who are retired or semi retired and not engaging with ARI
- Men not engaging
- Wider diversity from social/economic and cultural grounds.

OUTCOME

ARI would be positioned to be an inclusive, membership led organisation and model of good practice in self help and development.

People more informed, more involved and more active resulting in a diverse and vibrant organisation with increased membership growth.

Who needs to be involved

N.E.C

Regional Committee

Staff

Team Leader (RDO)

Outreach Workers

HOW

1. Recruit in each region a Regional Development Officer with responsibility as a team leader and 4 additional outreach volunteers.
2. Through training and support build the skills and expertise of the regional committees so they are best placed to sustain the work of the organisation.
3. Provide information and support in new media to enable regional committee to deliver effectively and efficiently.

Year 1

Recruit from members a Development and Outreach team consisting of a Team leader and 4 additional outreach volunteers.

Maintain work currently being undertaken by the Development Team

This team would participate in a training programme designed to enhance existing skills and build additional as identified by the Team.

20 weeks basic training programme to include:

- Facilitation Skills
- Communication
- Understanding the environment
- Ageing with Confidence
- Personal Development
- Equality & Diversity training
- Developing a personalised work plan to match regional plans.

This training will be coordinated by the NDO and using some external specialist trainers.

After training the new team would begin the implementation of the new programme on a phased basis.

Element 2: Consolidate the regional structure by building on the current expertise.

AIM

To have an effective, solid regional committee which reflects the pivotal role of the regional structures within ARI?

How

Establish a development sub group

Ensuring the regional activities match the vision of the organisation.

Acknowledging the work required from committee members and supporting this work through training and networking among the regions. Currently, there is an energy and a 'buy in' among the regional committee for increased opportunities to network, share cross regional events and to learn from each other's experience. The first Workshops created an understanding and awareness for the need for greater networking and skill sharing. Networking on themed and planned events will support the 'embedding' of best practice for inter regional networking and cooperation.

With support from the National Development Officer provide the regional committees with support to develop best practice in training and networking among the regions. This would include:

- ❖ Social Media
- ❖ Working well as a regional Committee through the use of sub groups and delegation.
- ❖ Inter Regional Events

- ❖ Holiday hosting
- ❖ Best use of Council meetings to ensure:
 - ARAs needs and opinions are heard and responded to.
 - Create a space for information sharing and new ideas
 - Are effective networking events with a ‘fun’ social element

YEAR 2

Implement Outreach action plan, which will:

- ✓ To equip the ARA members with the skills to run vibrant active associations
- ✓ Each region to provide training for their members to ensure they feel confident to go forward for Committee positions
- ✓ To provide ongoing support for :
 - Social media training
 - IT Skills
 - Lap Top provision to each ARA and member (s) up skilled to use it
- ✓ At national level to request meeting with LOG ON & LEARN programme with a view to linking ARAs into this programme in a more concrete way.

NDO will undertake the following actions to ensure implementation of action plan

- ✚ Coordination and support to the Outreach Teams
- ✚ Training provision to outreach Team
- ✚ Support Regional Committees
- ✚ Identify potential sources of sustainability

Provide Regional Committees with support, information resources and networking opportunities.

YEAR 3

Maintaining the implementation of action plans with a focus on:

- ✚ Identifying local and regional structure to which ARI can link with and collaborate on key pieces of work.
- ✚ Ensure local ARA members have a strong sense of ownership of the ARI at a local regional and national level

Appendix 3



A Proposal for the Development of a Fundraising Strategy for Active Retirement Ireland 2012-2013

Context

In order to ensure Active Retirement Ireland's (ARI) long term growth and sustainability, particularly in the context of Atlantic Philanthropies spending down, ARI now wish to develop a strategic fundraising plan to ensure the viability of the organisation in the longer term.

To date ARI has not focused its attention on fundraising and we do not have a dedicated fundraiser in place. Aside from current grants from Atlantic Philanthropies, the HSE and other statutory sources, the remaining income is mainly derived from membership fees, a national raffle and one or two corporate sponsorship agreements.

In order to replace existing grant income in the order of €500,000 per annum from 2014 onwards, during 2012-2013 we plan on developing and implementing a sustainable and diversified fundraising programme.

As a result of our current participation in the For Impact training programme, which Atlantic is supporting, we have become more acutely aware of the importance of developing a sustainable fundraising plan in order to:

- Increase the level of positive impact that ARI has on its members and the wider retired community
- Ensure that Active Retirement Ireland is best positioned to deal with the growing number of retired people as a result of Ireland's ageing population
- Address the impact that decreased government funding and Atlantic's spend-out policy will have on our programmes

In reviewing our potential for developing a fundraising strategy we look first to our strengths:

- Active Retirement operates a number of hugely successful programmes across the country through its local and regional networks with over 23,000 members – giving us access to a significant volunteer base to engage in a fundraising programme.
- The fact that ARI is already funded by both Atlantic Philanthropies and the State adds repute and credibility to the organisation in the eyes of other potential donors
- Some limited local and national fundraising initiatives are already in place such as the National Raffle
- The database of supporters generated from the raffle alongside the scale of the membership provides a good basis for developing further fundraising activity
- A three year commitment from corporate supporter JMG Travel indicates that ARI is an attractive proposition to potential corporate partners
- The issue of ageing is one of significant current interest to a large section of the donating public - other age-focused organisations such as Age Action and Friends of the Elderly have leveraged significant funds from corporate donors and the general public
- Few fundraising cobwebs – an opportunity to create a fresh and innovative approach to fundraising for the 21st century

From a purely fundraising point of view, the main challenges that we need to be address are as follows:

- No current strategic approach to fundraising and no fundraising staff member in place
- The current fundraising is limited to the national raffle, once-off corporate sponsorships/advertisements and unsolicited public donations – most of the fundraising activity is reactive rather than proactive
- The current economic climate makes it a more challenging time to raise funds, particularly where a donor pool does not already exist
- A need to invest in the introduction of new fundraising avenues such as community engagement and events, major-gifts, tailored corporate partnerships, a legacy programme, additional trust and foundation support, on-line giving and a monthly/regular donor programme.
- A need to develop an external Fundraising/Champions Board to network and open doors on behalf of the organisation - particularly important for high-level fundraising.
- A need to review the current promotional and communications material, including the website, to put a greater focus on fundraising, and in particular to encourage more on-line donations, promote regular giving and to show what Active Retirement can achieve through donor support

Recommended Approach

At Active Retirement Ireland we aim to:

1. Develop a fundraising strategy, which:

- Operates in accordance with best practice in line with new charity legislation
- Builds on existing strengths in volunteer support and fundraising
- Reflects developments and changes within ARI in terms of cores services and the needs of our service users
- Maximises fundraising revenue by effective coordination of fundraising activities
- Identifies both the challenges and opportunities associated with fundraising for an organisation with a volunteer-led membership ethos at its core
- Promotes the uniqueness of ARI as an organisation in Ireland, yet capitalises on similarities with other organisations focused on older people such as Age Action Ireland
- Examines and takes account of the fundraising strategies and successes of other age-related organisations both nationally and internationally

2. Develop fundraising structures and support arrangements that:

- Reflect the requirements of the newly developed fundraising strategy
- Ensure that any risks associated with fundraising are managed and that any newly recruited fundraising staff will be equipped to identify and develop new fundraising initiatives
- Are appropriate for an organisation of the scale of ARI with a realistic fundraising target

Having consulted with a number of fundraising professionals including O’Kennedy Consulting, who are currently working with us as part of the For Impact training, we plan to develop our fundraising plan as follows:

Approach

1. Internal Review

Before developing our external fundraising proposition, time needs to be spent reviewing any donor activities and our development to date, while also examining our future goals to ensure that the organisation’s future vision and financial needs are reflected in a clear Donor Case for Support – the clearer the overall organisational vision the better the fundraising success.

Questions such as the following will help to focus our team and key management:

- What are the fundraising goals – in terms of service, training and any capital costs?
- How well thought out are these goals?
- How can ARI best collaborate with other organisations?

- What are we offering potential members and supporters?
- Is the Organisation perceived publicly the same way as it is perceived in-house?
- With whom if anyone are we competing for funding?
- What is unique or distinctive about our approach in comparison to other similar organisations locally?

2. Framing a Donor Case for Support

Having carried out an internal review and answered these and other questions, we plan to begin preparation on the Case for Support which outlines our core programmes and activities, the organisational structure, our future plans and fundraising needs. This document will help to focus us on the level of funding needed for each area of our work and how targets can be achieved. At a later stage, elements of this Case can be integrated into funding strategies for corporate and high-net worth donors – to give them a clear guide of what will be achieved by their investment and the timescale involved.

We understand that funding requests and appeals often need to be linked to specific programmes and in particular to highlight the NEEDS of the ageing community and the IMPACT that Active Retirement has on the lives of those we support. For example, although we may require funds to provide administrative support, it will be important to emphasise the programme or activity that will take place rather than the operations behind it. Our Case for Support needs to tell the story of the people we support and why our work is so vital.

3. Fundraising Strategy

Once the Case for Support has been developed we will need to devise a fundraising strategy to compliment it – which avenues of fundraising are most suitable for us, who to involve in the process, timescales and the costs associated. As already outlined, fundraising avenues might include developing a major gifts and corporate partnership programme, making applications to additional trusts and foundations, legacy development, annual giving, personally targeted mailings, the introduction of a regular giving programme and community/events based initiatives.

In order to effectively implement a multi-pronged fundraising programme, we will need to establish and work with a single CRM database – collating details of all supporters to include members, donors and volunteers. We have been advised that having one centralised donor management system will be essential to the long-term success of our fundraising and donor communications.

A fundraising strategy must include information about who potential donors are at all funding levels and what is the best approach mechanism – as we have learnt the approach can differ significantly depending on whether the donor base is corporate, philanthropic or community driven.

We also understand that we will need to spend significant time and staff resources on researching and engaging our potential donor audience and to this end we

believe that at least one dedicated staff member will need to take responsibility for this.

4. Recruitment of a Fundraising Manager,

At present there is no member of staff with the time or specific skills set to give their full attention to the development of the fundraising plan as outlined above and therefore we would like to be in a position to appoint a full-time Fundraising Manager in early 2012 who, with support from senior management and the Board, will take the lead in developing this plan. In making this appointment we would take into account the specific skills set that will be required in order to implement the proposed fundraising strategy.

5. Development of Internal Resource, Systems and Support Services

As outlined in previous sections, a fundraising plan can only be effectively implemented if investment is made in the support structures required such as the acquisition of a donor database system, staff training and recruitment, consultancy and agency costs, communications/pr and development of promotional material among other resources.

6. Communications

We are aware that our fundraising and communications strategies, although separate, should be closely aligned and partnership is needed between both to ensure optimum success. Our website, newsletters, promotional material and other resources are very important in enabling us to reach out to new donors. These tools and additional marketing material should be used throughout the development of our fundraising campaign and adapted as necessary.

While Active Retirement Ireland is well-known among those aged 65+, there is still much work to be done on promoting our brand to a wider donor audience. There is also a need to promote the public understanding of the rights of older people, and particularly the positive impact that ARI has had on the lives of those in retirement.

7. Fundraising Development Costs

This is an outline of our proposed approach and following initial discussions and consultation with O'Kennedy Consulting regarding the level of investment needed; and having outlined our requirements, challenges and goals; we have been advised that in order to successfully source new donor income in the region of €500,000 per annum by 2014 we would need an investment in the region of €100,000 per annum to cover the following costs:

- Recruitment of a Fundraising Manager (region of €45,000-€50,000)
- Training and Staff Development (€10,000)
- Consultancy & Agency Costs (€20,000)
- Database system and IT services (€10,000) Re-development of promotional material, website etc to reflect fundraising proposition (€10,000)