



5050vision

BUSINESS PLAN
April 2009 - March 2012

INDEX

Section	Page
1. Introduction	3
2. The Importance of the 50+ Agenda	3
3. Everybody's Future	5
4. Purpose of 5050vision	6
5. Business Plan 2009 – 2012: Priorities and Objectives	8
6. Measuring Success	15
7. Working with us	15
Appendix 1 Framework for Ageing: The 4 Pillars	16
Appendix 2 Framework for Ageing: Priorities at a Glance	17
Appendix 3 5050vision Partnership and Management Arrangements	19

1. INTRODUCTION:

5050vision, the North West Forum on Ageing, was launched in 2003 as the region's partnership response to the changing demographics in the region and the potential opportunities this presents. It is a strategic partnership of public, voluntary and private sector organisations and interests. Its aim is to influence policy and decision makers to act, to exploit the opportunities offered by growing numbers of over 50s in the population and to support their continued contribution to the economy and to society.

At the end of 2007, the work and contribution of 5050vision was externally evaluated, the evaluation can be found on our website: www.5050vision.com under the Publications section.

The impact of 5050vision in promoting this economic agenda and its "added value" to the region through co-ordinated partnership working, with little resource investment, was well recognised in the evaluation report. Subsequently, the Northwest Development Agency (NWDA) asked 5050vision to commission the development of a more coherent policy approach to the issues of demographic change and an ageing population, going beyond the economic focus of 5050vision.

In December 2008, 5050vision with the support of a range of key partners produced a North West Regional Framework for Ageing "Everybody's Future". The Framework was formally launched in April 2009 and this 5050vision Business Plan 2009 – 2012 describes the expanded role the partnership will now play in turning the Framework into action, preparing for demographic change and improving the experiences of people over 50 in the North West in the future.

2. THE IMPORTANCE OF THE 50+ AGENDA:

The demographic context

The North West is entering a period of profound demographic change. This change is being driven largely by increasing longevity and a declining birth rate following the post-war "baby boom". The impact of these changes will be considerable and affect every area of society. As a result there is an urgent need for the North West to act quickly to address the implications and the opportunities presented by these changes.

According to a report from the Office of National Statistics published in June 2008, by 2030 the number of people in the North West aged 50 and over will increase by 25%, while the number of people aged 60 and over will rise by 40%.

Unless action is taken, the consequences of demographic change could be far-reaching for the people who live in the North West and the economy of the

region. Failure to act could result in labour and skills shortages, falling productivity and further inequalities in the health and wealth of the population.

To deal successfully with the implications of an ageing population means shaking off outdated stereotypes and altering attitudes towards work, retirement and the process of growing older in our society. Plans and policies need to be considered carefully, to ensure they are sensitive towards people living longer and the complex social and personal implications which arise as a result. It is essential that public, private and not-for-profit organisations plan an effective response to demographic change. By implementing practical medium and long term policies, organisations and communities can ensure maximum benefit from the opportunities that are presented by changing demography, rather than concentrating on the perceived challenges.

Employing the Over 50s

Over the next 20 years, the number of people living longer and healthier lives will grow dramatically in relation to those aged between 15 and 60 years. This will result in a huge increase in the ratio of non-working people to working people in the region (the aged dependency ratio). In some areas this rise will be even more acute. The ratio is set to soar in areas such as Cumbria where, according to a report by Experian in January 2008 'Demography, Migration and Diversity in the North West', it will almost match that in Japan, where the figure is the highest in the developed world.

These inter-regional variations signal further problems for coastal and rural regions, such as Cheshire, where the percentage of people 65+ is increasing the most rapidly. Partly due to the outward migration trend among younger people towards cities and inward migration of 'retirees', the under 50 workforce will be insufficient to meet the local demands arising from the large number of elderly people, some with extensive health and social care needs.

Unless the North West can employ those who are over 50 in significant numbers, its core labour and skills supply will suffer enormously and impact directly on maintaining and achieving economic growth in the region.

Currently, the North West's Gross Value Added (GVA), which measures the contribution to the economy of each individual producer, industry or sector in the UK, is 12% lower than the England average. The GVA created by the traditionally younger working population will not be sufficient to compensate for the lower economic activity rates of older people. .

Employing the over 50s (and their self-employment) is not only an opportunity to achieve economic benefit through retaining the older population as a workforce, it can also help organisations respond to the growing importance of the 'silver pound' or the ageing population as a significant market in different sectors.

Although the planned equalisation and increase in the State Pension Age are important milestones, in themselves they do not address the scale of the

challenge the 50+ generation faces in prolonging their working lives and striving to create a secure financial future.

Raising Awareness

Lower numbers of the over 50s in work and fewer young people in the population will affect the North West's GVA, as labour and critical skills shortages will compromise business, public and voluntary sectors.

There is an opportunity for the North West to take a lead role nationally by adopting a proactive response to demographic change. In addition, there is potential to work alongside growing European Union interest in the issues around demographic change and increasing longevity.

Indeed, in a November 2008 Department of Business, Enterprise and Regulatory Reform report, the Government identified demographic change as a key challenge if the UK is to compete and prosper globally. Moreover, current economic difficulties must not be allowed to divert attention or resources from longer term regional planning around this issue.

By planning for demographic change now, the North West can maintain a workforce which meets the expected demand for skills, and plan strategies to sustain health and wellbeing, such as choosing to continue to work and contribute to society. Housing, transport and leisure needs should be designed and tailored to meet the choices of the 50-plus population.

Raising awareness of the issues surrounding our ageing society will help policy and decision makers challenge views and perceptions towards people over 50, in turn encouraging positive views, and experience, of living longer.

3. EVERYBODY'S FUTURE

The Regional Framework for Ageing (contained in the report "Everybody's Future" available at www.5050vision.com under Publications) was commissioned and developed by 5050vision, acting for North West Development Agency and a range of regional partners. It was completed in December 2008 and formally published at a launch event in April 2009. Everybody's Future provides the detailed backdrop for this business plan for 5050vision – which is just one of many business plans that will be required to move forward action on the Regional Framework.

Around 150 partners and stakeholders contributed to the report and the creation of the Framework. Participants included representatives from business, public sector, voluntary and third sector organisations, together with community and special interest groups and forums, and specialist and expert groups.

The Framework for Ageing is designed to underpin sub-regional and local strategy for responding to demographic change and, crucially, the new

overarching “Regional Strategy for England’s Northwest 2010 – 2030”. (The Regional Strategy is currently being developed by the NWDA, 4NW and their partners and draws together economic, spatial, housing, transport and health strategies for the North West which have previously been developed and published separately).

The pioneering proposals outlined in Everybody’s Future are designed to help businesses, organisations and communities to act now. The Framework provides direction and support for those making major policy and investment decisions to ensure their policies consider the changing demographics of the population – otherwise known as ‘age-proofing.’

The lead agencies involved in producing Everybody’s Future – the Northwest Regional Development Agency (NWDA), NHS North West, 4NW – the Regional Leaders Forum, Government Office for the North West, North West Care Services Improvement Partnership and Department of Health North West - all recognise the need to work together, through the strategic partnership of 5050vision, to create a framework that offers a consistent and coherent policy approach.

For reference purposes, the 4 main pillars of the Regional Framework for Ageing “Everybody’s Future” are set out in Appendix 1 and the Priorities at a Glance from the Framework are set out at Appendix 2.

4. PURPOSE OF 5050VISION:

This Business Plan describes the priorities and objectives that are specific to the role of 5050vision in relation to the 50+ agenda and the implementation plans and action on the Framework for Ageing over the next 3 years. Individual agencies and organisations have also committed to taking forward relevant work streams from the Framework. They will be separately accountable as statutory bodies for that work and will publish this within their own strategies and business or operational plans.

The purpose of the 5050vision partnership is to provide a strong and coherent regional focus on the age agenda which may be summarised as:

- To provide a regional voice on ageing issues
- Facilitating partners in order for them to achieve the priorities contained within the Ageing Framework
- Strategic – vision, influence (European, national, regional and sub-regional), horizon scanning, creating strategic alliances and stakeholder engagement at regional level
- Tactical ‘oiling the wheels’ – problem solving, facilitating and enabling
- Operational – day to day management of the partnership and organisation of its work to deliver the business objectives

5050vision operates under formal contract to North West Development Agency. The key partners are defined as the funding agencies of NWDA,

4NW, NHS Northwest, Department of Health - Public Health Team and Joint Improvement Partnership, Government Office North West, Age Concern Support Services (NW) and Age UK (the newly amalgamated charity of Age Concern and Help the Aged).

A key role of the partnership is to engage with a much wider range of stakeholders at regional level and to embrace them as key members of the partnership vehicle, sharing and acting upon a common agenda. Members will include for example Job Centre Plus, the Learning and Skills Councils, Trades Unions Congress, Regional Housing Forum, the Pensions Service, the Department of Work and Pensions, transport representatives. We cannot achieve the implementation of the Framework for Ageing in the North West, nor the objectives envisaged in this 5050vision Business Plan, without their action and support.

To help define the role of the partnership, it is equally important to state what it is not! The partnership does not: act as a traditional campaign body; take responsibility for direct project delivery; replicate mainstream and national initiatives; directly engage or replace existing mechanisms with the general public; collect or generate demographic data although it uses existing sources; substitute for the responsibility of individual agencies or partners; interfere directly at local level; hold resources to distribute for projects or the like.

Mission Statement

5050vision's aims are "To influence and support regional policy and decision makers to raise awareness, and identify solutions, to the issues facing people aged 50 and over. 5050vision is keen to ensure that more people living longer and healthier lives, is seen as a real opportunity for the region".

Leadership and Accountability

The work envisaged for the next three years will be overseen, on a partnership basis, by the 5050vision stakeholder Forum. The wide ranging membership of that will be constituted by all the partner organisations that have a direct interest in, and some responsibility for, action on the relevant agenda. In addition to the specific partners of the Forum, a much wider range of stakeholders - interested parties, representational groups of older people, activists etc - will also need to be engaged and support the work of 5050vision through the Stakeholder Forum. Membership of the Stakeholder Forum will be secured through expressions of interest and will be governed by a set of partnership agreements

5050vision will also work to be the older person's representative organisation for the North West, feeding directly into the UK Advisory Forum on Ageing, chaired by the Department for Work and Pensions Minister for Pensions and the Ageing Society, and the Department of Health Minister for Care Services.

A smaller, multi agency Steering Group of key funding bodies will be accountable for business delivery and to ensure connectivity across the themes. It will drive the work of the Forum and will oversee the development and implementation of the annual Operational Plans.

Sitting within each of the four themes will be a task and finish group (either a new structure or wherever possible, making use of existing structures). These groups will be responsible for the action required to achieve the priorities within the relevant theme.

A summary of this structure is set out at Appendix 3.

It is important to state that the sustainability of 5050vision (its funding, support, the commitment of the regional agencies to it) over the 3 year period of the Business Plan will be crucial to the achievement of the goals envisaged in the Regional Framework for Ageing.

Achievements to Date

5050vision has achieved a significant amount since its formal launch in 2003. Going forward it will be important for the partnership to build on these successes, which include:

- Development of the European Region of All Ages Toolkit – Age proofing
- Delivering a North West Framework for Ageing – an all embracing framework which provides a focus on economic, health & wellbeing, transport and housing
- Becoming an exemplar for the rest of the country by providing expertise, focus and a multi agency vehicle for influencing regional strategic partners about key demographic issues that will impact on the North West in the short, medium and long term
- Major Conferences and discussion forums
- Enabling the North West to become a ‘flagship’ region
- Engaging and drawing together leaders, experts and organisations – creating and maximising communication through web resources, research, conferences, engagement events
- Providing a ‘tangible’ structure to support information exchange, expertise, signposting
- Influencing the content and focus of the Regional Economic Strategy
- Instigating or supporting research projects notably in respect of: the availability of relevant demographic data for planning in the region (the Experian report); employment issues facing older workers

5. BUSINESS PLAN 2009 – 2012: PRIORITIES AND OBJECTIVES

This Business Plan for 5050vision sets out:

- The role, responsibility and accountability of the partnership vehicle
- The short, medium and long term outcomes to be achieved through the partnership vehicle
- The particular focus of the partnership in the first year

A more detailed and action focused Operational Plan will need to be developed for each year of the Business Plan.

Priorities for Action

To successfully respond to the challenges of demographic change, action needs to focus on the four “pillars” of the Framework for Ageing, described in Everybody’s Future:

- Economy – driving employment, skills, enterprise for the over 50s
- Housing – affordable and suitable choice, support for vulnerable people
- Transport – integration, meeting changes in demand and use, access
- Health/Wellbeing – prevention, early intervention, health inequalities

The 4 pillars are supplemented by the common themes of equality and diversity, creating sustainable communities, choice, information, intelligence and advice. These interdependent arenas will be critical in how they impact on the North West’s older population. Taken together, they establish the footprint within which 5050vision will operate as a partnership vehicle. (Appendices 1 and 2 set out a summary of the 4 pillars and the “priorities at a glance” from the Framework for reference). The full document Everybody’s Future is available to view and download at www.5050vision.com.

In this context, the tabulated priorities and objectives which follow are themed within the primary purposes described for 5050vision in Section 4:

- Strategic Goals
- Tactical Approach
- Operational Mechanism

5050vision BUSINESS PLAN 2009/2012

Strategic Goal	Tactical	Operational
1. Provide effective input to shape European policy to reflect better the opportunities presented by an ageing population	Be recognised as a European regional exemplar through progress in the NW	Utilise existing infrastructure, working closely with Demographic Regional Partnership Maximise income to support partnership by engagement in European initiatives
2. Link European policy to North West ageing activity	Partnership working with European leads. Seek appropriate collaborative projects as exemplars.	
3. Champion national adoption of the NW Framework on Ageing with its emphasis on positive contribution of 50+ to the economy and society and particular requirements	Ensure all partners progress the framework and publish own plans	Create, deliver business plan. SMART objectives and priorities
	Manage any expectations that the NW can support other regions	
4. Sustainable presence in the Region	Explore longer term organisation and business model for the partnership. Ensure alignment with objectives of Regional Strategy and the work of key national and regional agencies inc DWP.	Seek and secure funding opportunities from key partners.
5. Influence Regional Strategy and regional investment programmes – 2026 to reflect the impact and priority for action on issues of	Raise profile of ageing agenda.	Involvement in key meetings/forums
	Connect into “refresh” processes of	Themed conferences

Strategic Goal	Tactical	Operational
demographic change	<p>partner and stakeholder organisations</p> <p>Promote and refine “Age Proofing” approach</p>	Utilise partnership leads
6.Communication and social marketing – ensure agenda and messages widely communicated and understood	<p>Build a body of expertise, information, data, tools that support organisations and individual employers</p> <p>Identify gaps for further research</p>	<p>Create, deliver business plan</p> <ul style="list-style-type: none"> - tools - research - events <p>Develop Communications Strategy which segments and responds to stakeholder needs and raises partnership profile</p> <p>Deliver and implement current SME and Micro-business research project and subsequent multi agency action plan</p>
	Create and produce a portfolio of products that provide practical methods for implementing policies i.e. age proofing	Show casing examples of case studies and age proof policies – regional hub; Conferences etc
7.Act as an advocate in ‘futures’ planning	<p>Ensure 5050vision recognised and known in NW by relevant stakeholders.</p> <p>Create protocols with lead partners and stakeholders</p>	

Strategic Goal	Tactical	Operational
8. Influence partners quality and performance monitoring agendas, ensuring they are focussed upon ageing priorities	<p>Create and agree North West Key Performance Indicators (KPIs) for 50+ to be included in partners plans e.g. LAA, MAA;</p> <p>Create and agree key metrics for the work of the 5050vision partnership</p>	Monitoring and measuring KPI via CAA – demonstrate progression against KPIs
9. Create conditions for partnership working and strategic alliances	<p>Facilitate, support, engage, connect, co-create and deliver</p> <p>Explicit engagement arrangements are set out – partners, stakeholders, older people</p> <p>Work with DWP to influence the establishment of the Forum of Forums nationally. Aim to operate as one of the regional Forums for Ageing.</p>	<p>Measurable impacts identified.</p> <p>Older peoples contribution recognised, valued and influences policy making and action in NW. Specific engagement arrangements amongst stakeholders and partners articulated and understood by partnership.</p> <p>Create Task Groups as appropriate to achieve objectives</p>
10. Secure “ownership” of the Framework and Business Plan amongst key partners, ensuring the development of close relationships with appropriate new partners (including national interests as appropriate)	New charity Age UK and Department of Work and pensions etc to be involved in partnership arrangements of 5050vision. Other new opportunities at national level to be sought	Develop joint areas of work and support mutual agendas for action
11. Refine and embed Regional Framework for Ageing	Support partners to embed at regional and sub-regional level.	Deliver the objectives of the business plan.

Strategic Goal	Tactical	Operational
	<p>Develop detailed operational plan for 5050vision which defines effective and necessary interventions (e.g. Policy Champions) and action in agreement with partners/stakeholders.</p> <p>Ensure all actions required by the RFA are identified, owned and progressed, are capable of measurement and are measured.</p> <p>Ensure progress and achievement of objectives by collecting KPI and metrics data</p> <ul style="list-style-type: none"> - for the Region - for the work of 5050vision <p>Publish monitoring reports.</p> <p>Ensure governance and accountability arrangements for 5050vision are clear and completed inc TOR and Partnership Agreements.</p> <p>Ensure partnership and stakeholder engagement arrangements for</p>	<p>Link and exploit opportunities presented by required Equality Impact Assessment (EIA) processes.</p> <p>Agree the leadership and management model for 5050 vision.</p> <p>Complete the recruitment process for fulfil the leadership and management requirements of the partnership vehicle.</p>

Strategic Goal	Tactical	Operational
	5050vision are reviewed, and changed appropriately to the new RFA agenda.	
12. Influence and respond to national agenda	Anticipate Equality Bill and determine and promote appropriate action by partners	Preparing partners and developing resources/case studies
	Lead and participate in European year of demographic change - 2012	

6. MEASURING SUCCESS

To achieve the degree of influence envisaged by the business plan, it will be crucial that progress in the North West is monitored and that the work of 5050vision can be measured. There is clear commitment to ensure that the necessary measures and metrics are developed, as set out in the Business Plan and this is a process that needs proper attention during the first year of the partnership.

5050vision has begun to articulate a number of potential measures that could be considered. The list below is indicative of the kinds of Key Performance Indicators (KPIs) that might be developed. It is not exhaustive and much more definition and refinement, as well as agreement with partners, will be needed as the partnership vehicle becomes properly established on its new, expanded agenda. The measures to be adopted must align with the commitments made by partner organisations and support the achievements of their priorities and objectives. For the indicators to be sustainable in the region, it is imperative that they are tied in to PSA, LAA and MAA measures to achieve traction and acceptance in the North West.

There are a number of quality tools that could aid the development process. The metrics/ KPIs currently under consideration include:

- Exports +/- %
- GDP +/- %
- Benefit Capacity and Pensions credit information and statistics +/- %
- Economic growth +/- %
- 50+ employment rate +/- %
- Financial and banking sector support of business start up for 50+, +/- %
- Investment in new jobs not displacement
- Access to training and retraining by 50+
- Measure economically active v unemployed
- Greater intergenerational activity
- Provision of Homes 'for life'
- Drawing in outcome measures articulated in the Framework

7. WORKING WITH US

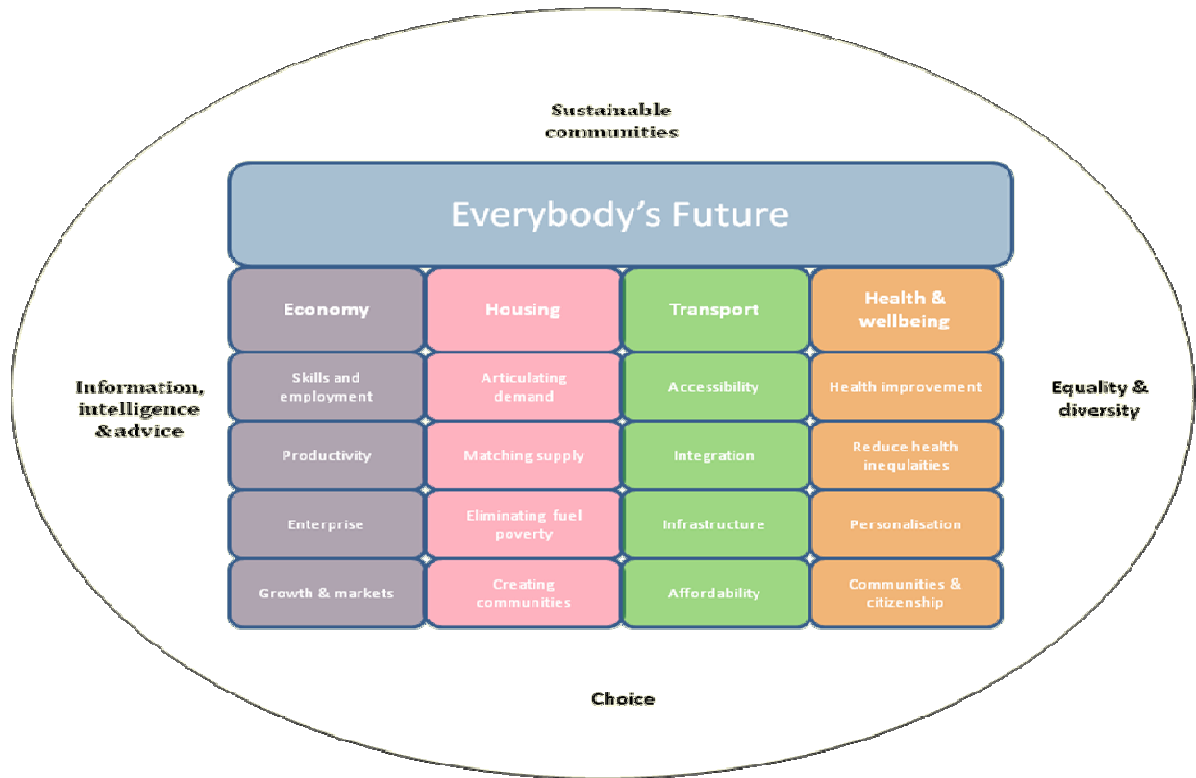
If you share our agenda for the North West, you may want to get in touch to offer your comments and contributions. We would be particularly interested to hear from you if you have ideas around appropriate measures of success for the North West which have readily available data to support monitoring.

If you haven't done so already, take a look at our website
www.5050vision.com

You can contact 5050vision either through info@5050vision.com or via Susan Hetherington, Executive Assistant to 5050vision by email at susan.hetherington@ageconcernblackburn.co.uk or ring 01254 266620

Appendix 1

NW FRAMEWORK FOR AGEING “EVERYBODY’S FUTURE” – THE 4 PILLARS



Appendix 2

NW FRAMEWORK FOR AGEING – “At a Glance” PRIORITIES FOR ACTION

Economic	Housing	Transport	Health and wellbeing
Achieve current employment rate target of 80%	Increased affordable and suitable housing to match the growth in the numbers of over 50s in the North West	Public transport vehicle operating conditions need to meet needs of older travellers	Tackle health inequalities experienced by particular groups in the 50+ population
Demographic change will require the Region to employ increasing numbers of 50+ to replace the shortfall from the 18-50 pool.	Sufficient supply and range of high quality accommodation to meet demands arising from the demographic change	Integrated travel planning needs to incentivise and optimise access to appropriate modes of transport	Plan for longer term fitness and health of population
Increase options for flexible retirement and working	Housing conditions promotes choice, independence and wellbeing	Rural options and priorities identified in face of ageing population, depopulation of villages and environmental constraints	Focus on prevention of ill health and early interventions to reduce the impact of disease processes
Engage and influence employers to change employment practice and to utilise the benefits of the 50+ workforce	Suitable housing available for ‘vulnerable groups’	Tackling congestion in metropolitan areas	Reduce negative impact economic exclusion/inability to participate in the workforce
Audit and forecast skills gaps	Create opportunities for people to release equity in their homes	Managing balance of demand in rural areas, particularly tourist ‘honey-pots’	Provide choice about care and provider of care/services to meet specified needs
Region to maintain and improve productivity (GVA) through 50+ contribution	Reduction of the number of people/households that experience fuel poverty	Rail and road investment for long-term changes in demand and use	Increase demand for integrated, accessible services closer to home

Recognise and develop indicators to put a cost value to 'unpaid' work or to release resources for others to work	Reduce known risks faced by frail elderly	Greater numbers eligible for subsidised and concessionary access to public transport. Clearer targeting of benefits	
Improve its business start up rates, NW currently 18% below the England average	Create range of housing options that promotes intergenerational mix and social inclusion	Integrate fares and ticketing systems	
Forecast the reduction in the 18-50 market	Support choice of community and accommodation to suit life stages		
Maximise 50+ customer base, maximise 50+ new markets	Create range of housing options that promotes intergenerational mix and social inclusion		
	Support choice of community and accommodation to suit life stages		

Appendix 3

5050vision PARTNERSHIP AND LEADERSHIP ARRANGEMENTS

5050vision Stakeholder Forum (The North West Forum on Ageing)

Membership of the full Forum body could include representatives from the following organisations and interests:

North West Development Agency
4NW – the Regional Leaders Forum
Age Concern Blackburn with Darwen Services Ltd
Age Concern Support Services (NW)
Government Office for the North West
NHS Northwest
DoH NW Public Health & Joint Improvement Partnership
Department of Work and Pensions
The Pensions Service
Job Centre Plus
Town and Parish Councils
Chambers of Commerce
Federation of Small Businesses
Ethnic Minorities Business Forum
PRIME
Regional Faith Forum
Regional European Partnership
Councils for Voluntary Services
Learning and Skills Councils in the NW
North West Universities Association
Age UK
NW Housing Forum
Transport Advisory Group

This is not intended as a comprehensive list and membership of the stakeholder Forum will be secured through expressions of interest from interested parties and organisations.

The Forum will be supported by an executive committee titled the Steering Group and it will be responsible for directing the activities and action of 5050vision. The work of 5050vision will be supported by appointed and designated key officers. This will include the remuneration of part time staff including an Executive Chair, Senior Manager and Project/Administrative support. Names of individual members may be found on the 5050vision website: www.5050vision.com

Steering Group

The Steering Group will be comprised of senior representatives of the key funding and contractual bodies of 5050vision including:

North West Development Agency
4NW – the Regional Leaders Forum
Government Office for the NW
Age Concern Blackburn with Darwen Services Ltd
Age Concern Support Services (NW)
NHS Northwest
DoH NW Public Health & Joint Improvement Partnership
Job Centre Plus