

Genio Strategic Plan 2015–2018



About Genio

Genio is an Irish-based non-profit organisation driven by a vision of a world where society benefits by valuing all of its citizens. Genio's mission is to ensure that people who are disadvantaged have access to personalised, cost-effective services enabling them to live full lives in their communities. Our interest is in demonstrating *and* scaling personalised cost-effective services to reach whole populations in need. Personalising services means ensuring that people are supported in ways that they need, when and where these supports are needed most (www.genio.ie/personalised-supports-film). Being cost-effective means using paid supports only as necessary and recognising the significant contribution of families and communities to the quality of people's lives. Governments across the world are increasingly recognising that standardised social services in fields such as housing, disability and mental health that are not tailored to meet individual needs are expensive, unsustainable and often result in poor outcomes. Ireland, like many countries, is having to confront shortfalls to be able to provide current levels of services to future populations as we are living longer and depending on fewer. In terms of both outcomes and economics, personalising services and making them cost effective is becoming an imperative here and across the globe.

Private funding has a vital role to play in supporting the demonstration of good quality, cost-effective services. Governments are best placed to sustain and scale services to whole populations in need. Moving from standardised to personalised services requires substantial public service reform.

Complex systems, with ingrained practices and vested interests, face major challenges in reforming themselves. With the support of the Atlantic Philanthropies, a small number of private donors and the Irish Government Genio is showing how the strategic use of philanthropic funding can act as a catalyst to reconfigure public spending thereby achieving substantial impact and lasting change. Traditional approaches to scaling using private funding involve finding new resources to replicate or multiply projects often established in parallel to existing services which create little or no change for the majority of those who depend on services. Genio brings public and philanthropic interests together to achieve lasting change that can be difficult, if not impossible, for either to achieve alone.

So far we are working in three fields, improving the lives of people with dementia, disabilities and mental health difficulties reaching over 13,000 people between 2010 and 2015. In partnership with Government and the Atlantic Philanthropies we are designing and managing a Service Reform Fund of €50m (2015 – 2018) to support the scaling of service improvements demonstrated over the past 5 years.

We have developed a model which combines funding, capacity building and impact measurement to bring about change. We believe that this model of change will work in other areas and, to this end, we are considering extending to the fields of homelessness and children at risk of neglect and abuse. It is also clear that this model would be helpful in other countries where there is an interface between the State and the citizen with a significant – especially an enduring – vulnerability.

Vision

- A society which benefits by valuing all of its citizens.

Mission

- To ensure that people who are disadvantaged have access to personalised, cost-effective services enabling them to live full lives in their communities.

Values

- We respect the inherent dignity of every individual.
- We are committed to ensuring that people who are disadvantaged and vulnerable live supported self-directed lives.
- We support the fair and cost-effective use of resources to provide supports and services to people in need.
- We believe that all of us benefit by being included and valued in our communities.
- We are convinced that communities that embrace diversity and value all of their members are enhanced and can thrive.
- We want to make our best contribution to bringing about a fair and inclusive society.

Strategic Objectives

We use a combination of public and philanthropic funding to pursue three key strategic objectives.

1. Demonstrate how resources can be deployed to ensure that personalised services can be made available on a cost-effective basis
2. Develop the capacity of key stakeholders to establish and sustain personalised, cost-effective services
3. Gather and disseminate clear evidence on how to deliver and resource personalised, cost-effective services

Strategies

We have developed a model that combines three essential strategies:

1. **Releasing funds** on a competitive basis to encourage innovative reform of services and stimulate the reconfiguring of resources in a personalised cost-effective direction that fosters community inclusion. Applications for grants are invited through the national press and are evaluated against published criteria agreed with funders. Sustainability and value-for-money are key criteria. Successful applicants must have a compelling sustainability plan to maintain change beyond the life of the grant. These grants are used as 'bridging finance' to get from old to new service models. For example, when closing disability institutions running costs are needed until the last person leaves. Meanwhile funding is required to develop supports

for residents moving to the community to enable them to be appropriately supported to become re-integrated and connected. Once institutions close, resources needed to run them can be used to support people in the community. We monitor progress of grantees, making onsite visits up to three times a year and, on occasion, have taken funds back where agreed outcomes were not being achieved (this helps to introduce private sector performance expectations into the traditionally more sheltered public sector). Between 2010 and 2015 Genio awarded grants (mainly Government innovation funding) amounting to over €23m to 226 projects throughout Ireland. This funding has leveraged a further €32m and is stimulating the reconfiguration of more significant resources as momentum for moving away from programmatic group-focused services to personalised services is nurtured and grows.

2. **Capacity-building** key stakeholders to implement required changes. We build skills and leadership amongst key stakeholders including:
 - People who use services, their families and friends, to advocate to secure the supports they require.
 - Service providers, policy makers, and service commissioners to refocus service provision in the desired direction.

We have allocated grants to capacity building projects and have also designed courses in Supported Self Directed Living which we run in various locations throughout the country

3. Undertaking and commissioning research to measure impact and costs to support refocusing and scaling to identify:

- Changes in the quality of life of those being supported to live more independently in the community.
- Costs of providing personalised services to people with different needs across urban and rural settings.
- What works best in refocusing services.

Challenges

Fulfilling potential: Our model of combining funding, learning and measurement is successfully bringing about change in our current fields of operation i.e. dementia, disability and mental health. We develop a deep understanding of each field on the basis of our existing expertise and knowledge and through consultation and research. We assess the capacity and leadership potential that exists in the field and use this as a basis for agreeing strategic targets to scale improvements with our funders in the overall context of achieving national policy objectives. We know our model can be helpful across different fields of social service. We also believe it could be helpfully introduced in different countries where governments struggle with the challenges that are at the core of public service reform, especially where there is an interface between the State and the citizen with a significant and enduring vulnerability.

Communicating effectively: Our work is strategic and often complex. However this does not mean that our communications have to be complicated despite the number

of stakeholders with whom Genio needs to communicate effectively. These include people who use services, their families and advocates; politicians; policy-makers; service commissioners and service providers. It is both a challenge and an opportunity to develop effective communications. A related challenge is to continue to be regarded by the various stakeholders as independent and valuable. Genio regularly convenes various stakeholders and provides a neutral space within which constructive dialogue can take place.

Finding and building learning opportunities:

Our main focus of interest is in helping to scale improvements in the lives of people who are disadvantaged and we regard public funding as the main resource to make this possible with private funding playing a strategic and catalytic role. Many foundations and intermediaries interested in scaling improvements seem to focus on scaling organisations rather than practice and do not engage with the public systems that are targeting the groups with whom they are concerned. We would like to collaborate with others with similar interests to ours within an international context to develop a learning community from which we could all benefit. We are encouraged by an increasing interest in scaling positive change through public/private partnerships in Europe and the U.S.

Funding the sustainability and development of Genio:

We have secured funding from both Government (through the Department of Health) and philanthropic sources (through the Atlantic Philanthropies) and on the basis of delivering effectively we are optimistic that Government will continue to fund through Genio and contribute to our core costs.

"We very much believe in this model and what Genio are trying to do...we would like to see and very much support an extension of this model into new areas to see where we can improve service delivery." Robert Watt, Secretary General, Department of Public Expenditure and Reform, Ireland.

"...Genio... have so many successful examples of how resources can be re-configured to bring practice into line with our national policy." Kathleen Lynch TD, Former Minister for Equality, Disability, Mental Health and Older People, Ireland.

"Genio makes real a vision that we have for people with disabilities and instils hope among services that things can be better." Bairbre Nic Aongusa, Former Assistant Secretary General, Department of Health, Ireland.

The ideal future for Genio is to continue to be funded by a mix of both private and public funding. Private funding enables Genio to retain some independence, flexibility and entrepreneurship.

The Atlantic Philanthropies believes that, *"The Genio model is a particularly exciting example of how public and philanthropic money can combine together to bring about lasting improvement for people."* Martin O'Brien, Senior Vice President, Atlantic Philanthropies.

However Atlantic is a life limited foundation exiting Ireland and other countries. Other philanthropists will need to be found to co-fund Genio alongside Government and this is a particular challenge in Ireland where philanthropy is relatively underdeveloped.

Note: Genio was established in 2008 and is governed by a board of eight directors, seven of whom are non-executive. All give their time on a voluntary basis. In 2010 Genio established a charitable trust (the Genio Trust) to facilitate the receiving and disbursement of funding for innovation. There are five Trustees who also give their time voluntarily.

The team is led by the Executive Director who is responsible for shaping the organisation's mission and for ensuring that strategies pursued within and across sectors in which Genio works are coherent and optimum. Ensuring that Genio is positioned to achieve its mission and managing key relations is central to this role. The Executive Director is also responsible for ensuring that the organisation is appropriately governed and managed and secures the necessary resources to continue to be a sustainable, vibrant and developing organisation achieving high impact.

The executive team currently has seventeen members variously dedicated to our three areas of activity - managing and monitoring the use of funds; developing and delivering training programmes to build capacity; and undertaking and commissioning research to measure impact and costs.

Appendix

Genio Boards, Committees & Team 2016

Special thanks to those who work with us on our boards and committees which comprise national and international expertise provided on a wholly voluntary basis.

Genio Trust

- Professor Brian MacCraith (Chair), President, Dublin City University.
- Geraldine Ruane, Chief Operating Officer of Trinity College, Dublin.
- Barney Whelan, Director of Communications and Corporate Affairs, An Post.

Genio Ltd. Board of Directors

- Teresa Kilmartin, (Chair), Director, Symbio HR Solutions.
- Madeleine Clarke, Executive Director, Genio.
- Dr Cathal Coleman, Lecturer, Department of Politics, University College Dublin; IT Consultant.
- Brian Dunnion, Strategy Consultant.
- Patrick McGowan, Expert by Experience; Lecturer, Dublin City University; former Director of Advocacy, Irish Advocacy Network.
- David McNamara, Chairman, Incol Funding Ltd; Director, Fonthill Private Equity Ltd.
- Dr Iognáid (Iggy) O'Muircheartaigh, Uachtarán / President Emeritus, NUI Galway.
- Geraldine Ruane, Chief Operating Officer, Trinity College Dublin.
- Barney Whelan, Director of Communications and Corporate Affairs, An Post.

International Research Advisory Committee

The International Research Advisory Committee incorporates expertise across intellectual disability, physical and sensory disabilities and mental health sectors, and also health economics and programme change.

Members:

- Professor Jerome Bickenbach, Disability Policy Unit, University of Lucerne, Switzerland.

- Gail Birkbeck, Strategic, Learning & Evaluation Executive, Atlantic Philanthropies, Ireland.
- Sarah Craig, Head of National Health Information Systems, Health Research Board, Ireland.
- Dr. Bob Illback, President, CEO, & Senior Evaluation Researcher, Reach, Louisville, Kentucky, US; & Deputy CEO, Headstrong, Ireland.
- Dr. Fiona Keogh, Director of Research and Evidence, Genio, Ireland.
- Prof. Philip McCallion, Director of the Centre for Excellence in Ageing & Community Wellness, University of Albany, US.
- Dr. David McDaid, Research Fellow in Health Policy & Health Economics, London School of Economics & Political Science, UK.
- Prof. Gerard Quinn, Director of the Centre for Disability Law & Policy, National University of Ireland Galway, Ireland.

Genio Team

- Madeleine Clarke, Executive Director.
- Dr Fiona Keogh, Director of Research & Evidence.
- Dr John Healy, Director of Change.
- Elaine Howard, Programme Manager - Dementia (P/T).
- Mary McGuire, Programme Manager - Dementia (P/T).
- Tara Doheny, Programme Manager - Disability.
- Sharon Lane, Programme Manager - Mental Health.
- Charlotte Knight, Capacity Development & Outreach Manager (P/T).
- Margaret Flynn, Finance and Training Officer (P/T).
- Dr Maria Pierce, Research Manager.
- Dr Olivia Cosgrove, Information Manager.
- Helen Corrigan, Data Analyst.
- Fiona Murphy, Communications & Development Manager.
- Mary Fagan, Corporate Affairs Executive.
- Emilia Kryzstofiak, Admin & Communications Officer.

A photograph of a man with short brown hair and a slight beard, smiling and looking upwards. He is wearing a dark long-sleeved shirt. The background is a soft-focus field of tall grass and wildflowers under a bright sky.

Raymond McGuigan,
The Transition to Home
Project, Cavan



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