



In the Business of
Smart Social Investment

Annual Report 2013

July 2012 – June 2013

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Foreword

Pat McLoughlin, Chairman, Genio

This annual report reflects another exciting and challenging year for Genio as we continue to strengthen our partnerships with Government and philanthropy in the interests of Ireland's most vulnerable citizens.



Ireland has a long tradition of providing public and social services which are essential to our society and economy. While we can build on this historic mandate it is clear that reform is required in light of the challenges we face. It is important to take advantage of all opportunities to bring about the necessary changes to provide the best services possible in the context of shrinking resources. The current Public Service Reform Plan gives a clear commitment to placing customer service at the core, ensuring that services are "customer focused, leaner, more efficient, better integrated and delivering maximum value for money". The scale and complexity of the task is evident, but not impossible. Through collaboration and partnership between Government, philanthropy, statutory agencies, families, advocates and service providers momentum is already growing. As we look to the future Genio looks forward to continuing to support and strengthen these partnerships.

We are grateful to the members of the Board of Genio who continue to contribute their time and significant expertise on a voluntary basis, as do the Board of Trustees and committees detailed in this report. Our impact to date is a testament to all those involved as we strive towards fulfilling the mission of our unique organisation.

Pat McLoughlin
Chairman

Professor Brian MacCraith, Chairman, Genio Trust; President, Dublin City University



I first learned about Genio as a result of their support for a ground-breaking mental health leadership initiative in Dublin City University in 2010. Since then I have been interested in Genio's support of social service reform through public-private partnership and have learned more about the 202 innovative projects supported nationally to date. In 2013 I was delighted to accept the role of Chairman of the Genio Trust.

There has been a long and positive history of philanthropy and state support in the education sector and it is heartening to witness the benefits of such collaboration beginning to unfold in the social service sector.

The evident improvement in services is having a real impact on people's lives today and will leave a legacy for generations to come.

A handwritten signature in cursive script, reading "Brian MacCraith".

Brian MacCraith
Chairman, Genio Trust

Madeleine Clarke, Executive Director



Now in its fifth year Genio is still a young organisation but through our work to date we have supported projects nationally to provide over 5,400 people with personalised services in the community. This has been made possible by continued support from the Atlantic Philanthropies; the Department of Health; the Health Service Executive; and the innovation and dedication demonstrated by the projects we support in communities across the country. I continue to be both humbled and energised by the personal stories from individuals whose lives have been transformed as the result of projects we have supported.

We are mindful of the continued fiscal challenges faced across the public system and indeed experienced by the public at large. We continue to promote cost-effective ways to achieving the best outcomes for people who use services. Over the coming year we will continue to strive to become ever more innovative, agile and effective; seeking to give people who are disadvantaged the skills and opportunities they need to build a life of their choosing in the community. A life everyone of us deserves.

A handwritten signature in cursive script, reading "Madeleine Clarke".

Madeleine Clarke
Executive Director

Our vision

- ➡ A society that benefits by valuing all of its citizens.

Our mission

- ➡ To bring together government and philanthropy to develop, test, and scale, cost-effective ways of supporting people who are disadvantaged to live full lives in their communities.

Strategic objectives

- ➡ Develop the capacity of key stakeholders to establish and sustain cost-effective individualised living options.
- ➡ Demonstrate how resources can feasibly be deployed to ensure individualised supports can be made available to those in need on a cost-effective basis.
- ➡ Develop and disseminate a clear evidence-base in Ireland for how to deliver and resource cost-effective individualised supports.



Genio is an Irish independent organisation that works to bring Government and philanthropic funders together to develop better ways to support disadvantaged people to live full lives in their communities.

We work in partnership with the Department of Health and the Health Service Executive, supported by the Atlantic Philanthropies. Driven by a vision of a society that benefits by valuing all of its citizens, we believe that everyone should have opportunities to participate in communities that value their contributions, regardless of age, disability or other perceived disadvantage. So far we are working to improve the lives of people with disabilities, mental health difficulties and dementia.

Context for our work

There has been a strong coherence in the goals and objectives of recent Irish policy which describe a similar service model for different sectors within the health and social care area. This model is strongly person-centred or individualised; is focused on enabling people who need support to remain living in their own homes for as long as possible; and addresses the need to give more control to those using services, through involving the person in the design of the supports they

need and in potentially controlling the funding for their supports. The common objectives across these policies are to improve quality of life, to enable people to achieve their full potential and to support people with disabilities, older people, people with mental health difficulties and others who need support to participate as active included citizens.

We help to bring about change in three ways:

1 Innovation Funding
Release funds on a competitive basis to encourage innovation & cost-effectiveness. These funds are outcome focused and performance-managed.

2 Learning & Skills
Support and capacity build key stakeholders to manage and implement required changes.

3 Measuring Impact
Undertake and commission research to measure impact.

Smart Social Investment

Genio is demonstrating how change can be achieved through the strategic investment of funds in innovative projects which are effective, accountable and transparent. We call this Smart Social Investment. We recognise that private donors and philanthropists have a vital role to play in supporting the demonstration of good quality, cost-effective services to those in need. Government is best placed to sustain and scale services in the context of implementing national policy. Genio brings public and private interests together to achieve change and lasting impact that can be difficult, if not impossible, for either to achieve alone.

The principles which guide our work

We believe that the needs of citizens should be the primary guide of the design of social services. The people who use these services often have insights and capacities to help government shape provision in effective, innovative and cost effective ways. We are passionate about improving services so that they:

- reflect the priorities of the people being served;
- enable limited resources to be targeted at the best and fairest value;
- foster independence, participation and community inclusion; and
- enable the formulation and implementation of progressive, democratically endorsed, public policy.

Our approach

As well as believing in a compelling vision for change, we are practical and realistic about how change within services happens. We focus in particular on those areas where:

- ➔ there is a gap between well-designed policy and service user experience;
- ➔ policy is being formulated and needs to be informed by how to get the best outcomes for

people being served in the context of limited resources; and

- ➔ service providers can be assisted to achieve change.

We avoid proposing elaborately designed blueprints and instead focus on increasing access of service users and their families to cost-effective services within the context of a realistic interpretation of statutory obligations and demographic trends.

What do we mean by individualised supports?

The emphasis in providing individualised supports is building on a person's strengths, responding to them as a citizen, and supporting them to have an ordinary life. Individualised supports have the following characteristics:



- ➔ Planned and delivered on the basis of a consideration of their wider needs and the potential contributions of each person, moving away from a focus on deficits.
- ➔ A response to each person rather than group-based response.
- ➔ Chosen by the person with a disability, mental health difficulty or dementia (or their family or advocate as appropriate).
- ➔ Delivered in the community, fostering inclusion, and participation rather than in segregated, stigmatising settings.
- ➔ Inclusive of family and community supports and mainstream services.
- ➔ Reliant on paid professionals only when necessary.
- ➔ Cost-effective and representing good value for money.

Structure & governance

Established in March 2008, Genio Limited is an Irish registered company (Reg no. 454839), which is governed by the Genio Board of Directors and operates as a non-profit organisation. Members of the Board are normally elected for three-year terms and meet at least four times a year. The Board is supported by a Board Committee structure which is currently being put in place including the; Audit and Risk Committee; Nominations and Successions Committee; Remuneration Committee; and Fund Development Committee. Genio established a charitable trust in 2010 called the Genio Trust in order to receive and disperse innovation funding. The Genio Trust is a registered charity (CHY 19312) which is governed by the Genio Trustees. All members of Genio boards and committees give their time on a voluntary basis.

Our people

In the last year we welcomed six new members to the team bringing it to 11 full-time equivalents (FTEs). This has enabled us to increase the breadth of our work with dedicated programme managers now in place in our three current focus areas – disability, mental health and dementia – and to make significant developments in our Skills and Leadership Programme which provided learning opportunities to over 700 people in the last twelve months. See Appendix 1 for details of our boards, committees and team.

Books of account

The measures that the directors have taken to ensure compliance with Section 202 of the Companies Act, 1990, are the utilisation of appropriately qualified accounting personnel (Crowleys DFK) and the maintenance of computerised accounting systems. The books

of account are maintained at the company's office at Marlinstown Office Park, Mullingar, Co. Westmeath (See Appendix 2 for Genio Ltd and Trust accounts).

Fundraising standards and Charities Act

We are fully committed to achieving the standards contained within the Statement of Guiding Principles for Fundraising of Irish Charities Tax Research Ltd. (ICTR) as reflected in our own 'Donor Charter' (see www.genio.ie). We welcome the establishment of a Charity Regulatory Authority and Register of Charities under the phased implementation of the Charities Act 2009. Genio intends to be fully compliant.

Auditor

In accordance with Section 160 (2) of The Companies Act, 1963, Deloitte, Chartered Accountants have audited the Genio accounts since July 2010.

Risk management

Managing risk effectively is essential for Genio to achieve its key objectives and safeguard our funds and assets. Our Risk Management Policy require that we do a full risk assessment each year. This means identifying the organisation risks; working out which ones are important; and putting measures in place to avoid, minimise or mitigate our main risks. This process will be repeated annually, reviewed by the Audit and Risk Committee and approved by the Board. The responsibility for the management and control of Genio rests with the Board and their involvement in the key aspects of the risk management process is essential, particularly in setting the parameters of the process and reviewing and considering the results.



Achieving Impact

Genio is improving the lives of thousands of people with disabilities, mental health difficulties and dementia across Ireland.

Since 2010, we have awarded funding to 202 projects nationally to provide over 5,400 people with personalised services in the community. In addition almost 9,000 families, carers and staff have received information and training through the projects we support. We have awarded €21.6m in innovation funding to date which has unlocked a further €30m in resources through the projects we support.

Key learnings

Genio regularly reviews the progress of grantees through site visits and the collection of both quantitative and qualitative information. From this information we have begun to identify some shared issues and learning on service change.

A more detailed review of our learnings will be published next year. Some highlights to date are listed overleaf.

By the numbers 2010 – 2013

1,145

Applications
received

202

Approved
projects

5,400

People to receive
personalised
services

9,000

Individuals, family
members & staff
to receive training
& information

2,272

People reached
through events,
conferences & other
public forums

Key learnings that have been identified to date include the following:

- The person being supported is of central importance in leading the process of change – if this is really respected it can change the process of working with people and the nature of interactions and decisions.
- It is important to consult with families on an individual basis
- It is useful to start small and model change.
- Changing to an individualised approach takes time to do well.
- Leaders are needed at all levels of an organisation and among people using services and their families.



€21.6m

Innovation
funding awarded

€30m

Further resources
unlocked through
supported projects

€1.2m

Invested in
R&D

6

Mental health
community
residences closed

2

Disability
institutions
closed

Our learning has also highlighted that the process of supporting people to move from institutional living to individualised supports in the community is more complex than previously thought and has pointed to the need for three simultaneous streams of activity;

1. Identify accommodation.
2. Support the person not just to move but to fully integrate with and participate in their community.
3. Change the way in which the organisation operates in order to move from supporting groups of people in a small number of buildings to supporting people living in their own homes.



Grace-Ann & Maria, 'Moving Forward' project, Sligo



Innovation Funding

Genio releases funds on a competitive basis to encourage innovation & cost-effectiveness. In 2013 we received 368 Expressions of Interest and 52 projects were awarded funding.

Genio's innovation funding is designed to be a catalyst in facilitating change in how health and social care services are delivered. The financial support is important to fund the transition from a traditional service to one which provides individualised supports to those who need them.

The criteria attached to the funding also incentivises the reconfiguration of the human and financial resource from the traditional service towards the provision of individualised supports. Annual grant rounds were run in 2010, '11, '12 and '13. Details of all projects supported by Genio to date are available in our booklet 'Projects 2010 – 2013' published on www.genio.ie/multimedia/publications.

Criteria against which applications for funding are screened were developed through a process that commenced in 2009. Over 110 stakeholders (including people with disabilities and mental health difficulties and representatives of relevant statutory, non-governmental and academic organisations) were interviewed and a review of

relevant documentation on quality and standards was conducted in order to develop criteria that could be used to identify individualised, cost-effective initiatives across Ireland. They have proved robust in clarifying for applicants what type of work will be supported and in identifying the applicants who are likely to be successful. They have been modified continually based on the experience of funding projects and feedback from stakeholders. The criteria are listed in Appendix 3.

Genio Funding Process

1. Priority Setting

Each year funding priorities, which reflect national policy, are agreed with the Health Service Executive, the Department of Health and the Atlantic Philanthropies. This process informs the

funding streams available for application. In 2013 the funding streams were:

DISABILITY

- Stream 1 Community living
- Stream 2 Alternative respite
- Stream 3 Supporting school leavers

MENTAL HEALTH

- Stream 4 Supporting recovery
- Stream 5 Supporting work, education, and training
- Stream 6 Supporting families and carers



2. Designing and publicising

An online form was designed and published on www.genio.ie along with the criteria and supported by relevant guidelines, FAQ & help sections. Applications were invited by Genio through the national press, information seminars (also podcasted on our website), social media and direct email notices to individuals, agencies and relevant coalition and umbrella groups.

3. Evaluating applications

Applications were evaluated by Genio against the agreed criteria. In 2013 we introduced a 2-stage application process. At Stage 1 we invited Expressions of Interest (Eols), which involved a shorter application form than previous years. We received 368 Eols and as a result of evaluation 92 projects were shortlisted. At Stage 2 the shortlisted Eols were invited to complete a full application, essentially a more detailed version of the Eol.

Stage 2 applications went through a second evaluation process and a number of these applicants were called for an interview in order to gain greater clarity over specific issues. This proved a very helpful stage in the evaluation process.

4. Monitoring Group and Trustees

Following the evaluation process in 2013, a shortlist of projects were submitted for consideration for funding to the Monitoring Group whose membership consisted of:

- Madeleine Clarke, Executive Director, Genio
- Tom Costello, Programme Executive – Ageing, Atlantic Philanthropies
- Cate Hartigan, Former Assistant National Director Disability Services, Health Service Executive

- Teresa Kilmartin, Director, Symbio HR Solutions; Member of the Board of Genio
- Noel Mulvihill, Assistant National Director for Older Persons, Health Service Executive
- Martin Rogan, Former Assistant National Director Mental Health Services, Health Service Executive

The Monitoring Group reviewed the shortlist submitted and made their recommendations to the Board of Trustees.

THE BOARD OF TRUSTEES ARE:

- Prof Brian MacCraith (Chair), President Dublin City University
- Dr Ruth Barrington, Chair of the Genio International Research Advisory Committee; Former CEO, Molecular Medicine Ireland
- Dr Edmond Molloy, Chairperson, Mental Health Reform; Director, Advanced Organisation

The Trustees reviewed the recommendations and made the final decisions regarding the funding awarded to projects.

5. Grant commencement

Following the decision of the Trustees, 52 successful applicants were informed that they would be awarded funding and detailed terms and conditions were agreed with each project. Genio uses a performance-based funding model. Regular monitoring of funded projects takes place over the life of the project (usually 3-4 visits), where the outputs and outcomes of each grant are recorded.

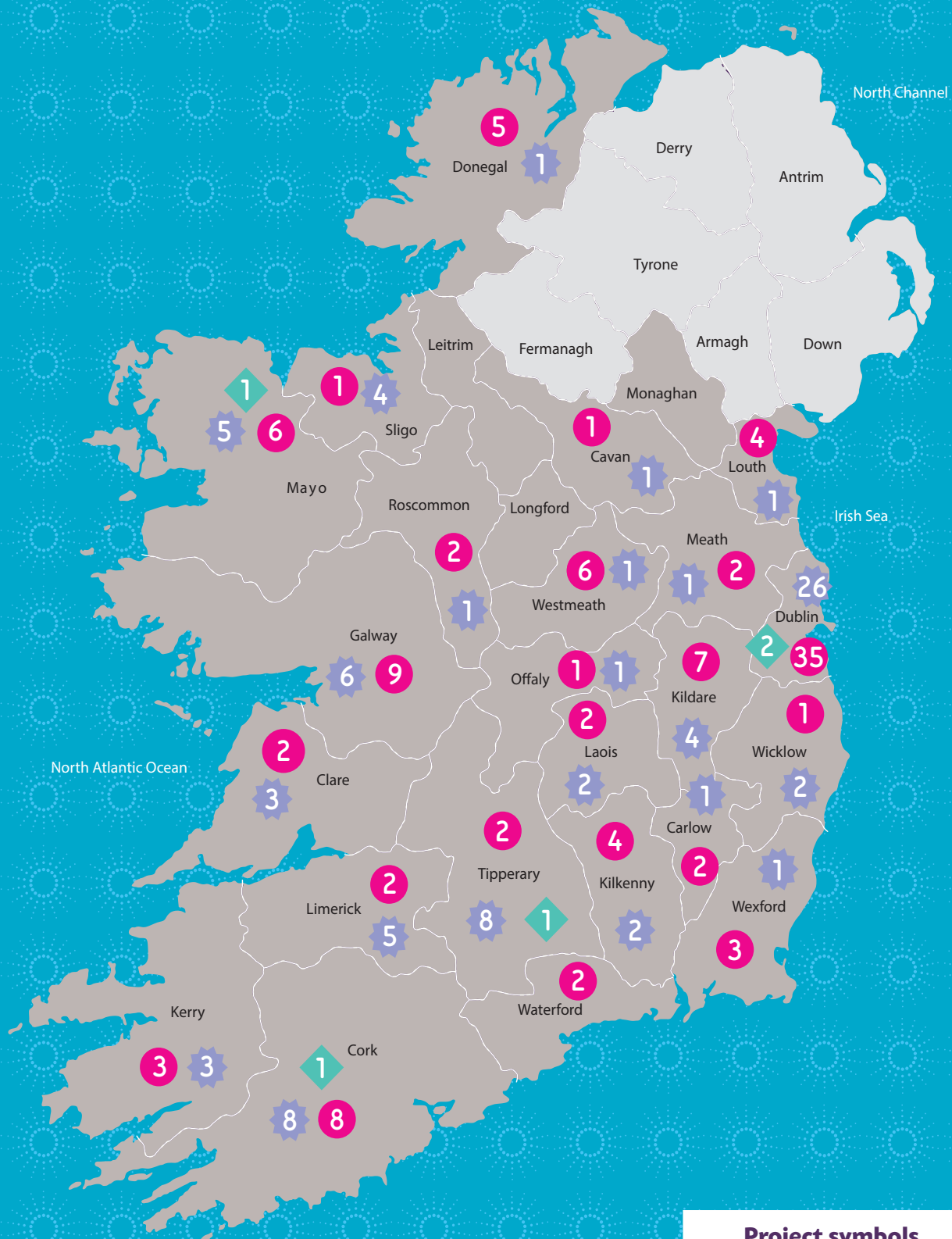
2013 distribution of funding

In 2013, 368 expressions of interest were received by Genio for funding in the fields of disability and mental health and a total of 52 projects were awarded funding, amounting to €4,540,187.

Funding Stream	Description	Project Type	Amount Awarded by Genio	Contribution Amount from Project	Total Project Cost	Number of Beneficiaries	Number of Projects
Community Living	To develop non-institutional models of residential support for individuals in the community.	Disability	€1,451,490	€818,943	€2,270,433	131	10
Alternative Respite	To develop a range of non-institutional respite options for individuals with disabilities and their families	Disability	€322,373	€210,757	€533,130	98	9
Supporting School Leavers	To support alternative ways of meeting the work, education, training and recreation needs of school leavers with a disability.	Disability	€596,633	€281,220	€877,853	77	8
Supporting Recovery	To assist with the reconfiguration of services so that individuals are supported to remain within their own communities or to return there.	Mental Health	€1,285,009	€1,392,355	€2,677,364	700	10
Supporting Work, Education & Training	To develop opportunities to support people with mental health difficulties to remain in, or to access work, and work enhancing education/training in the mainstream.	Mental Health	€725,877	€2,077,823	€2,803,700	2,223	6
Supporting Families & Carers	To support families and carers of those experiencing mental health difficulties to be better able to support individuals while maintaining their own well-being.	Mental Health	€158,805	€99,721	€258,526	558	9
Total Funding		Disability	€2,370,496	€1,310,920	€3,681,416	306	27
		Mental Health	€2,169,691	€3,569,899	€5,739,590	3,481	25
		Total	€4,540,187	€4,880,819	€9,421,006	3,787	52

Projects supported by Genio 2010 – 2013

Since 2010 innovation funding has been awarded to over 200 projects across Ireland through the Genio Trust.



Project symbols

- Disability
- Mental Health
- Dementia



Building Skills & Leadership

A key priority for Genio is building skills and leadership amongst individuals, families and those who have a role to play in supporting people who are disadvantaged to live full lives in their communities.

Since 2010 we have reached over 2,272 people across Ireland through training, events, conferences and public forums in each of the three sectors in which we currently work - disability, mental health and dementia.

Inter-Project Learning Days

One of the most important elements of the Skills and Leadership programme is the collaborative learning and practice development through Genio's 'Inter-Project Learning Days', which see representatives of Genio-supported projects coming together to share information and ideas. This has proven to offer invaluable opportunities to not only gain from the experience of peers, but also to establish ongoing networks of support and learning for what are often new and challenging ways of working. From July 2012 to June 2013, 17 inter-project learning days and other related learning events were organised at which 730 people attended.

Endeavour for Excellence

The Endeavour for Excellence (EFE) programme was designed to promote the development of high quality, individualised service examples and to develop leadership for the future growth of individualised services across Ireland. The programme has engaged both the intellectual disability and the mental health sectors. In the last year 22 organisations received intensive consultation and training support for the implementation of their Genio-funded project and 83 staff received training. The EFE programme is focused on the following objectives:

1. Assist organisations to design, create and provide model individualised supports to service users.
2. Support organisations to identify and capacity build leaders who will assist with further development of individualised services within their organisation.
3. Provide consultation to organisations regarding the implementation of individualised supports.
4. Present training sessions on 'Working in an Individualised Way.'
5. Routinely reflect on the learning that transpires as these activities are carried out.

Individuals who use services and their families

In 2012 Genio commissioned an evaluation of four Genio-supported projects which included a range of family training initiatives (see page 23 for further details). Based on the recommendations of the report and following a consultation on how best to action these recommendations, a planning workshop for 16 family representatives was held in June 2013. The aim of this workshop was to enable family support groups to better identify what they want to achieve and how it might be best accomplished.

Dementia Learning Network

A key objective of the Genio Dementia Programme is the development of a broad based and inclusive learning network to create momentum for change by distilling and sharing knowledge of what works. A Dementia Learning Network is currently being designed to provide opportunities to learn about how to provide community-based supports for people with dementia and their carers in a cost-effective, integrated way. It is envisaged that this process will produce:

- ➔ Synthesised learning and insights that are directly relevant to, and inform national policy and practice.
- ➔ A vibrant and inclusive community of learners, informing and being informed through sharing practice.
- ➔ A framework for reconfiguring existing resources to provide a richer, community-based response for people with dementia, informing how current demonstrations can be scaled and resourced for maximum impact.

This network will offer opportunities to:

- ➔ Learn about how to provide community-based supports for people with dementia and their carers in a cost-effective, integrated way.
- ➔ Share learning, experiences and problem solving.
- ➔ Access peer support and connect with others.

The learning network is being designed to connect the projects supported through the Genio Dementia Programme; other dementia groups that have applied to Genio for funding; and a wider group of national organisations and leaders in the area. The intention is to support a continuous learning process through the sharing of learning from the demonstration sites as it arises; the collaborative sharing of knowledge between peers; and by accessing external expertise as required.



Minister Kathleen Lynch with Don Bailey



Research & Evidence

Genio undertakes and commissions research and evaluation to measure the impact of our work and the projects we support. We do this in order to inform policy, best practice and implementation in the areas within which we work.

The Genio Research & Evaluation Programme is dynamic and responsive to opportunities which arise within our work. Findings from our research are made public and disseminated to service commissioners and policy makers; used to inform advocacy; and help refine our innovation funding strategy.

Within Genio we monitor the progress of all the projects we support against outcomes agreed at the commencement of the funding period. Three to four onsite visits usually take place over the life of the project where progress is recorded and information and support is offered to projects facing challenges. The results are aggregated in order to measure the overall impact of each Genio funding stream.

In addition, we commission independent research on a competitive basis, overseen by an International Research Advisory Committee, in specific areas such as moving to independent living, alternatives to group-based 'day services', and assistive technology. Evidence is usually gathered

from a number of Genio-supported projects related to the specific area of research, and where relevant, other programmes not directly supported by Genio which can usefully inform the overall findings. Three such studies are described here.

An evaluation of personalised supports to individuals with disabilities and mental health difficulties

In 2012 Prof. Roy McConkey and his colleagues in the University of Ulster and Trinity College Dublin (TCD) were commissioned to conduct an evaluation which is one of the most comprehensive studies of its kind in Ireland and internationally. The aim of the study is to provide the evidence required to inform the transition from traditional group-based models to individualised, cost-effective supports and services, and to accelerate the availability of such services and supports (see pg. 7 for a description of individualised supports).

All of the participants in the study are receiving individualised supports and most are moving from institutional to more independent settings in their communities. Using quantitative and qualitative methods, a range of measures of individual outcomes are being obtained, along with data on service-level inputs and processes. Data on direct costs are also being measured which, combined with the data on outcomes provide an assessment of cost-effectiveness of the interventions across the various sites. Three data collection points over 12-18 months are capturing change in these measures over time providing information on how outcomes for these individuals change as they move.

197 people with disabilities and mental health difficulties are included from 23 projects, as well as 102 relatives of these individuals and 187 key workers supporting the participants. Senior managers are also being interviewed.

The findings from this evaluation will be published in December 2013, and a fourth data uplift from the participants will be conducted in 2014. This will provide a longer-term evaluation of the impact of individualised supports on individuals.

Evaluation of grants to support young people with disabilities

In 2012 Richard Wynne from the Work Research Centre was commissioned to evaluate 15 projects around Ireland. These projects were awarded funding by Genio with the aim of supporting ways of meeting the work, education, training and recreation needs of young people with disabilities (in particular school leavers) that is mainstreamed and located in 'real' community settings. The projects are demonstrating the implementation of New Directions, the policy on 'day supports' for people with disabilities and mental health difficulties. The New Directions report sets out "a new approach to day services that envisages all the supports available in communities will be mobilised so that people with disabilities have the widest choice and options about how to live their lives and how to spend their time" (see www.hse.ie/newdirections).

The main research questions which are being addressed include:

- What is the impact on young people with disabilities of an individualised model of service with a focus on supporting mainstream employment, education, training and recreational opportunities?
- What are the direct costs of this model?
- How did the services implement this model?

15 projects are involved in this research and a mixed methods design has been implemented over a 12 month period from December 2012, involving both qualitative and quantitative approaches. The final report from this study is expected in 2014.

Towards a full life: An evaluation of family support programmes for people with a disability in Ireland

In 2012 Prof. Agnes Higgins and colleagues in the School of Nursing and Midwifery in Trinity College Dublin were commissioned to undertake an evaluation of four projects which involved a range of family training initiatives. The study employed a multi-method approach using qualitative and quantitative methods to provide a comprehensive evaluation of the effectiveness of these projects in increasing the knowledge and skills of family members. The report was published in March 2013.

The key findings showed that:

- ➔ The initiatives had, for the majority of participants, a positive impact on the person attending, their family member and the family unit.
- ➔ Participants were of the view that the initiative enhanced their knowledge and skills, and what they learned was relevant and practical.
- ➔ Several participants described how taking part challenged and changed their thinking about disability, and increased their awareness that their family member had rights to participate in a full and meaningful life and had the right to have autonomy over their own life.
- ➔ Interview and survey data clearly indicated that the initiative positively affected the participants' ability to advocate for the rights of their child and engage with services on a more equal footing.
- ➔ Some participants reported greater involvement and social connections of their family with community. This appeared to come about as a result of parental mind-sets

changing, circles of support being established, and parents requesting that their son/daughter be involved in activities.

- ➔ Participants reported improved quality of life, self-esteem and confidence for their family member as a result of their increased autonomy, independence and involvement in decision making.
- ➔ Participants described how the initiative had positive effects on the family unit and related an improved family understanding of the family member with a disability; an increase in dialogue and communication within the family; and an increase in the involvement of other family members in the life of the person with a disability.
- ➔ Many participants described the importance of the networking aspects of the initiatives in: overcoming feelings of isolation; helping them to share knowledge and learn from each other; allowing them to feel less isolated and alone; and supporting them in establishing friendships.



Published reports can be found on the Genio website: www.genio.ie/multimedia/publications/research-reports

Monitoring projects

Genio has a comprehensive monitoring system for all Genio-supported projects, where progress reports and data are collected regularly to track progress towards agreed outputs and outcomes. This information is gathered with support from onsite visits to the projects by the Genio team, usually three to four times a year.

In 2013 we also designed and developed a new online reporting system for projects, which allows the collection of both qualitative and quantitative information. Reporting forms are tailored to the specific outputs and outcomes of each project so that their unique progress can be tracked. Detailed case studies of individuals, families and services are also gathered to provide a further insight into the impact achieved.

A database has also been designed and developed to collect detailed information and outcomes on people with dementia and their carers over time who are being supported through the Genio Dementia Programme. This database will provide a

rich data resource that will be unique in Ireland in terms of its scale.

Genio uses Goal Attainment Scaling (GAS) to capture and summarise the achievements of the projects we support. Goal Attainment Scaling (GAS) is an evaluation method which measures achievement relative to the set of outputs and outcomes agreed with the projects. It allows achievements across a diverse range of projects to be compared while preserving the uniqueness of the outputs and outcomes of each individual project.

To date, 67 completed disability and mental health projects have been scored, which generated the following results:

- ➔ 43% of projects to date exceeded their project aims
- ➔ 42% of projects to date achieved their project aims
- ➔ 15% of projects did not achieve all of their project aims

To date, 67 completed disability and mental health projects have been scored, which generated the following results:

- ➔ 43% of projects to date exceeded their project aims.
- ➔ 42% of projects to date achieved their project aims.
- ➔ 15% of projects did not achieve all of their project aims.



Gail Birkbeck, The Atlantic Philanthropies and Christine Linehan, University College Dublin



The Coming Year

In the coming year we undertake to provide further innovation funding to projects across Ireland; expand our Research and Evidence Programme; and grow the numbers of people accessing skills and leadership development opportunities.

Innovation funding

We look forward to further developments through the Genio Dementia Programme with new innovation funding focussing on integrated care pathways in the acute hospital sector and individualised supports in the community. We anticipate that applications will be invited in November 2013.

Genio will be opening a new round of innovation funding to disability and mental health projects in 2014. The funding streams and criteria in relation to this funding will be subject to agreement with the Atlantic Philanthropies and the Health Service Executive. Updates will be published on www.genio.ie.

Research and Evidence

Genio has commissioned a comprehensive range of research and evaluation studies several of which will be undertaken in 2014.

These include:

- ➔ A follow up to the University of Ulster study 'Evaluation of personalised supports to people with disabilities and mental health difficulties'.
- ➔ An evaluation of projects supporting young people with disabilities in work, education, training and recreation.
- ➔ An evaluation of the programme of community support for people with dementia.

Genio has also funded a PhD scholar in the Structured Population and Health services Research Education Programme (SPHeRE) to evaluate the implementation of personalised budgets.

In addition Genio is collaborating with the Centre for Disability Studies in UCD on a literature review of respite and survey of respite services to inform a future evaluation of alternative respite models.

We will continue our comprehensive monitoring system for all grantees, where progress reports and data are collected regularly to track progress towards agreed outputs and outcomes.

Building skills and leadership

The 'Inter-Project Learning Days', which sees representatives of Genio-supported projects coming together to share information will continue into 2014. Two series of learning days have been confirmed for November 2013 and February 2014 and further learning events will be announced.

2014 will see a development of the current 'Endeavour for Excellence' programme to the 'Enabling Excellence' programme. A parallel development programme will commence for leaders, referred to as 'Supported Self Directed Living (SSDL) Leaders'. Supported Self-Directed Living (SSDL) is an expression we will be using going forward to describe when individuals, with

the necessary support, are able to choose, pursue and achieve 'their good life' to a similar extent to others in their society. These programmes will be delivered in both Dublin and Limerick.



Events

We look forward to hosting a national event 'Reforming Social Services through Public Private Partnership' on October 9th 2013. This event will bring together stakeholders from the public, private and non-profit sectors to focus on how social investment can be harnessed to refocus large public service expenditure programmes to achieve better outcomes more cost-effectively for those in need. We will welcome participants and delegates from home and abroad including representatives from Government; national and international foundations and philanthropists; the business community; non-profit organisations; families and individuals being supported through Genio; academics and researchers; and other interested parties.

We also look forward to hosting a national Dementia Conference in December 2013, which will bring together healthcare professionals from Ireland and the UK, family members, academics, carers and volunteers working with and supporting people with dementia.

Appendices

Appendix 1 – Genio Boards, Committees & Team 2013

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

Genio Board Members

- ➔ Pat McLoughlin, Chairperson, Genio; Former CEO, Irish Payment Services Organisation; Former Chairperson, Local Government Efficiency Implementation Group
- ➔ Madeleine Clarke, Executive Director, Genio
- ➔ Dr Cathal Coleman, Lecturer, Department of Politics, University College Dublin; IT Consultant
- ➔ Tom Deegan, Managing Director, Fitzgerald Life & Pensions; Director, Matthew Shea Charitable Trust
- ➔ Patrick McGowan, Expert by Experience; Lecturer, Dublin City University; former Director of Advocacy, Irish Advocacy Network
- ➔ Teresa Kilmartin, Director, Symbio HR Solutions
- ➔ Dr Edmond Molloy, Chairperson, Irish Mental Health Reform; Director, Advanced Organisation

Genio Trust

- ➔ Professor Brian MacCraith, Chairperson; President of Dublin City University
- ➔ Dr Ruth Barrington, Formerly CEO of Molecular Medicine Ireland
- ➔ Dr Edmond Molloy, Chairperson, Irish Mental Health Reform; Director, Advanced Organisation

Genio Monitoring Group

- ➔ Madeleine Clarke, Founding Director, Genio
- ➔ Tom Costello, Programme Executive – Ageing, Atlantic Philanthropies
- ➔ Cate Hartigan, Formerly Assistant National Director Disability Services, Health Service Executive
- ➔ Teresa Kilmartin, Director, Symbio HR Solutions
- ➔ Noel Mulvihill, Assistant National Director for Older Persons, Health Service Executive
- ➔ Martin Rogan, Formerly Assistant National Director Mental Health Services, Health Service Executive

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:

- ➔ The Committee is chaired by Dr Ruth Barrington, former Chief Executive of Molecular Medicine Ireland.
- ➔ 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, NUIG, Ireland.

Dementia Advisory Committee

- ➔ Anne Connolly, Director, Ageing Well Network
- ➔ Tom Costello, Programme Executive – Ageing, Atlantic Philanthropies
- ➔ John Dunne, Acting CEO, The Carers Association
- ➔ Dr Kate Irving, Researcher and Lecturer in the Department of Nursing and Human Sciences, Dublin City University
- ➔ Marie Lynch, Programme Development Manager, Irish Hospice Foundation
- ➔ Noel Mulvihill, Assistant National Director for Older Persons, Health Service Executive
- ➔ Maurice O’Connell, former CEO, The Alzheimer Society of Ireland (ASI)

Dementia Technical Advisory Group

- ➔ Dr Suzanne Cahill, Research Associate Professor of Social Work and Social Policy, Trinity College; Director, Dementia Services Information and Development Centre at St James’s Hospital Dublin
- ➔ Hope Leet Dittmeier, International Expert in Social Role Valorisation, Realizations LLC
- ➔ Prof Murna Downs, Chair in Dementia Studies and Head of Bradford Dementia Group, University of Bradford
- ➔ Prof Caroline Glendinning, Professor of Social Policy, University of York
- ➔ Prof. Eamon O’Shea, Personal Professor, School of Business & Economics, NUI Galway

Genio Team

- ➔ Madeleine Clarke, Executive Director
- ➔ Hugh Kane, Chief Operations Officer
- ➔ Dr Fiona Keogh, Director of Research and Evidence
- ➔ Dr Paul Doherty, Leadership Development Manager
- ➔ Tara Doheny, Programme Manager – Disability
- ➔ Ann Coyle, Programme Manager - Dementia
- ➔ Dr Marina Bowe, Programme Manager - Mental Health
- ➔ Olivia Cosgrove, Research Officer
- ➔ Margaret Flynn, Accounting and Grants Officer
- ➔ Fiona Murphy, Communications Manager
- ➔ Orlaith Potter, Communications and Operations Executive

Appendix 2 – Genio Limited & Trust Accounts

GENIO LIMITED

(A company limited by guarantee and not having share capital)

INCOME AND EXPENDITURE ACCOUNT FOR THE YEAR ENDED 30 JUNE 2013

	2013	2012
	€	€
INCOME	1,610,442	1,123,738
EXPENDITURE	(1,607,452)	(1,093,178)
	<hr/>	<hr/>
SURPLUS ON ORDINARY ACTIVITIES BEFORE INTEREST	2,990	30,560
Other interest receivable and similar income	8,393	7,893
	<hr/>	<hr/>
SURPLUS ON ORDINARY ACTIVITIES BEFORE TAXATION	11,383	38,453
Taxation	684	(7,744)
	<hr/>	<hr/>
SURPLUS ON ORDINARY ACTIVITIES AFTER TAXATION	12,067	30,709
	<hr/>	<hr/>
RETAINED SURPLUS FOR THE YEAR	12,067	30,709

THE GENIO TRUST
STATEMENT OF FINANCIAL ACTIVITIES
FOR THE YEAR ENDED 30 JUNE 2013

	2013	2012
	€	€
INCOMING RESOURCES		
Income	5,533,065	2,315,320
Other interest receivable and similar income	48,623	29,477
OUTGOING RESOURCES		
Grant release	(5,444,165)	(2,315,289)
Other expenses	(89,523)	(31)
NET INCOMING RESOURCES FOR THE YEAR	48,623	29,477
Balance brought forward	29,477	-
BALANCE CARRIED FORWARD	78,100	29,477

Appendix 3 – Criteria for assessing applications to the Genio Trust

Applications in all the grant streams are assessed against the following key criteria:

1. Project description – highest scores will be for those applications which:

- a. clearly describe the aims and activities and number of individuals to be supported
- b. describe responses that are consistent with relevant policy
- c. aim to support individuals in a way that builds on their strengths and where supports are planned and delivered on the basis of a consideration of the wider needs and potential contributions of the person, moving away from a focus on deficits
- d. provide individual rather than group-based responses
- e. are based on supports and settings which are chosen by the person with a disability/ mental health difficulty/ dementia (or their family or advocate as appropriate)
- f. are delivered in the community, fostering inclusion and participation rather than in segregated, stigmatising settings
- g. use family and community supports and mainstream services whenever possible
- h. are reliant on paid professionals only when necessary

i. articulate a strong vision of reconfigured services to roll this provision out to more individuals and sustain this model into the future

j. clearly describe the outcomes to be achieved

2. Value for money – highest scores will be for applications which demonstrate the strongest cost-effectiveness (i.e. a strong cost benefit ratio) and which include a reconfiguration of resources. The overall application itself must represent good value for money in comparison to other applications.

3. Financial and organisational sustainability beyond the life of the grant – highest scores will be for applications with the most robust and detailed sustainability plans, which includes reconfiguration of resources.

4. Governance and organisational capacity within the organisation to implement proposal – highest scores will be for those applications which can demonstrate the extent of the commitment of the organisation to this work in terms of; competencies within the organisation, strong change management and implementation planning, high-level support in organisation and/ or funder and, where relevant, commitment to roll-out through the whole organisation.

5. Other criteria which are taken into account include the quality of the individual plan (if requested) and the composition of the consortium (if applicable to grant stream).



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Genio, Marlinstown Office Park,
Mullingar, Co. Westmeath, Ireland.

Tel: +353 (0)44 9385940

Email: info@genio.ie | Web: www.genio.ie