

RESPONSE #108739640 SUBMITTED ON 27/03/18 15:10:15

WEF Voluntary Action Fund Online Application Form

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[Click here to name this section](#)

1.1 Legal name of your organisation

Legal name of your organisation Age Scotland

1.2 Registered address for your organisation

Address 1 Causewayside House
Address 2 160 Causewayside
Address 3
Town / City Edinburgh
Postcode EH9 1PR
Email info@agescotland.org.uk
Website Address www.agescotland.org.uk

1.3 Main contact for this application

First Name Sarah
Last Name Randell
Position Head of Fundraising
Telephone [REDACTED]
Mobile No answer given
Email [REDACTED]

1.4 Bank account details

Name of Bank [REDACTED]
Account Name [REDACTED]

REDACTED -
OUT OF
SCOPE



Bank Account Number

[REDACTED]

Sort Code

[REDACTED]

Number of signatories

[REDACTED]

| |
|--|
| <p>REDACTED - OUT OF SCOPE</p> |
|--|

1.5 The legal status of your organisation

Legal Status **Company Limited by Guarantee**

Other *No answer given*

Charity No. **SC010100**

Is your organisation a branch of another charity/body? **No**

Company No. **153343**

In what year was your organisation established? **2009**

1.6 Is your organisation a Social Enterprise?

Is your organisation a Social Enterprise? **No**

1.7 Annual income

What was the income of your organisation in its last financial year? **3.9**

No answer given

1.8 Geographical area

In which local authority area is your registered office based? **Edinburgh**

1.9 What are the main aims and activities of your organisation?

What are the main aims and activities of your organisation?

Our passion and purpose is to bring transformational change so that older people lead engaged and fulfilled lives, without loneliness and isolation, valued by the rest of society, and supported by a national policy giving fair access to the services they need. Our charitable purposes date back seventy-five years when local groups across Scotland formed to support older people whose lives had been shattered by the effects of war. Today, in the context of an ageing population, the challenges are different but community focus remains important. Committed to achieving tangible, life-enriching outcomes for the people whose needs we serve, everything we do links to three clearly defined aims, against

which our impact is measured:

1. tackling loneliness and social isolation
2. helping older people be as well as they can be
3. promoting positive views of ageing

Currently, our core activities are 1) Advocacy and policy work; 2) Information, advice and friendship for older people – which includes Scotland's National Helpline for older people, their carers and families; 3) Outcomes based project work in priority areas including Early Stage Dementia and the Veterans Project; 4) Community Development work with member groups of which there are around 1,000; 5) Workshops with corporate partners on Pre-retirement planning and Age awareness; 6) Insurance products and services for older people.

1.10 Who are the people involved in your organisation?

| | |
|--|----|
| How many Board members do you have? | 10 |
| How many volunteers are involved? | 52 |
| How many full-time staff are employed? | 42 |
| How many part-time staff are employed? | 21 |

1.11 Describe the make up of your Board of Trustees/ directors.

Briefly tell us about their skills and experience.

Age Scotland's Board meets quarterly and has three standing committees which report to it: the Commercial Board; Finance and Risk Committee and Member Services Committee. The current Board is made up of Trustees who were appointed and/or openly recruited. Trustees serve for a three-year term of office and can be re-appointed for a further three-year term before having to stand down. We have three Honorary Officers: Chair, Vice-Chair and Treasurer. The Honorary Officers work closely with the charity's Senior Management Team (SMT) and each have responsibility for a specific Committee. Lord Foulkes (Chair) is the Chair of the Charity Board, Dorry McLaughlin (Vice Chair) is Chair of the Member Services Committee and Tom O'Connell (Treasurer) is Chair of the Finance and Risk Committee.

The Charity operates an induction process for new Trustees and we actively encourage existing members of the Board to undertake relevant training. We maintain a record of the training (and support) undertaken by Trustees. Where a matter warrants it we arrange for the whole Board to undergo training.

Our Board members are listed, below, with an indication of their specialisms and skills:

- 1 Lord George Foulkes, Politician, House of Lords, Chair
- 2 Dorry McLaughlin, CEO Viewpoint Housing Association, Vice chair
- 3 Tom O'Connell, Chartered Accountant, Treasurer
- 4 Brendan McCormack, Professor Queen Margaret University Edinburgh, Trustee
- 5 Pennie Taylor, Freelance broadcaster, Trustee
- 6 Ken Nicholson, Retired Management Consultant, Trustee
- 7 Sir Geoff Palmer OBE, Retired academic, Trustee
- 8 Marion McMurdo, Retired academic/Gerontologist, Trustee



9 Alison Harrington, Retired Dental Practice Manager, Trustee

10 Dr Alasdair Rutherford, Economist, Trustee

1.12 Independent Referee

| | |
|-----------------------------------|-----------------|
| Name | [REDACTED] |
| Position | [REDACTED] |
| Organisation | [REDACTED] |
| Address 1 | [REDACTED] |
| Address 2 | [REDACTED] |
| Address 3 | No answer given |
| Address 4 | No answer given |
| Town | [REDACTED] |
| Postcode | [REDACTED] |
| Telephone | [REDACTED] |
| Email | [REDACTED] |
| Relationship to your organisation | [REDACTED] |



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2.1 Name of project

Age Inclusion Matrix

2.2 Project start/end date

Start date (dd/mm/yyyy)

01/05/18

Project end date (dd/mm/yyyy)

31/01/19

2.3 Briefly describe your proposed project

Age Scotland's Human Resources specialists will work with four corporate partners, helping them become age-inclusive and bringing cultural change so older staff can truly flourish at work.

Our Age Inclusion Matrix (AIM) enables older workers to use their skills and experience, it creates a culture where constructive challenge is encouraged as a prompt for personal growth and progression, giving staff a greater sense of purpose, autonomy and job-satisfaction. This is supported by re-imagining policies and practices that create conducive and supportive work cultures.

AIM involves a seven-step process 1) Scope, 2) Aspirations, 3) Current Reality, 4) Gaps Analysis and Action Plan, 5) Three Month Progress Check, 6) Six Month Evaluation, 7) Final Report and Next Steps.

Work with staff from each partner organisation starts with a workshop that gently peels away layers of stigma and stereotyping to help people recognise everyday ageism before agreeing and addressing goals and forming an action plan:

- Staff explore, agree and articulate Outcomes.
- A self-assessment of age inclusion in each organisation is conducted.
- Having identified the goal and taken stock of the situation, the difference is the "gap" to be bridged.
- A six-month action plan is developed with stakeholders, supported by three and six-month reviews.
- At the end of the cycle, the baseline measure is re-visited to determine the extent to which the gap has been bridged.

Partners, across a spread of sectors, [REDACTED], [REDACTED]. The total Scottish workforce is around 1,400.

2.4 Participant Groups

Older Workers (Those Aged Over 50)

2.5 Please describe the need or issue that your project will address, including evidence of need

Until now, typically, employers have managed a traditional model of career progression where workers move up a career ladder as their experience grows – up until the point of retirement at a fixed age – with younger workers following behind. A fixed retirement age allowed companies to succession plan with a degree of certainty. But demographic changes, employment legislation and pension freedoms have blurred these lines for employers.

As the population in Scotland ages over the next twenty years, working lives will need to extend beyond the traditional retirement age into later life. Significant growth is projected amongst older workers while a falling birth rate indicates a marked reduction in younger

employees. The short supply of younger workers is likely to be heightened by many choosing to work in specific industries such as media and technology. This is evidenced by the 2016 Population Projections for Scotland by the National Records of Scotland which predicts that there will be 13% more adults in the 65-74 age group in ten years' time, while the number of 16-24 year olds will fall by 9%.

Research also indicates that older workers would welcome more flexible conditions, enabling them to continue earning beyond their eligibility for the state pension and also remain in employment for reasons of personal fulfilment and wellbeing. The Annual Population Survey 2016 (Regional Employment Patterns in Scotland) illustrates there is evidence that older workers, aged 50 to 64, would like to reduce their working hours while remaining in employment for longer. However, there are age discrimination and attitudinal barriers to be overcome – not least employers' perceptions of older people's health issues, skill depreciation and limited investment in the training of older workers. Scottish Government's Older People and Employment in Scotland report, produced by University of Edinburgh Business School, highlights the concerns of those who participated in the study that their considerable skills and experience were not recognised by potential employers and work-related stress was also an issue that reduced the likelihood of them wanting to extend their working lives.

Despite the important implications of an ageing workforce in Scotland and its escalation to Government agendas, the Chartered Institute of Personnel and Development (CIPD) found in 2014 that only 20% of companies had an age strategy or were developing a business case for one.

If employers understand the implications of an ageing workforce and are encouraged, with practical support, to embrace change with positive action, they are more likely to gain and retain a competitive advantage. This means that it is a sound investment for companies to provide fulfilling work for older staff and accommodate flexible working patterns. Similarly, older staff also need to be encouraged to see the benefits of extending their working lives in terms of aspiration, having a sense of purpose and fulfilment and the positive impact on their physical and mental health.

2.6 Please show how your project would pay due regard to the principles within the Fair Work Framework, namely Effective Voice, Opportunity, Security, Fulfilment, Respect.

The project with corporate partners focuses on seventeen areas within AIM's Matrix that will have a breadth and depth of impact. Themes include Recruitment practices, Learning and development, Age inclusion awareness, Listening, Flexible working, Carer support, Transition support, Health and wellbeing, Adverse health, Multi-generational teams, Managers and supervisors, Finance and pensions, Law, and Human Resources policies and practices.

We fully embrace the Fairwork framework's "virtuous circle" of practices, behaviours, attitudes and outcomes. The framework has helped shape our approach, the language used, and how evidence of embedded cultural change will be gathered. Each aspect of the framework is addressed, below, with relevant application.

- **Effective voice:** Engaging staff is important in helping them recognise and dismantle barriers to age inclusion. Creating 'safe spaces' where staff can understand everyday ageism brings self-awareness and this gentle approach, which gets under the skin of an organisation and its people, has proven effective.

- **Opportunity:** AIM's seventeen themes are designed to create a supportive culture where older workers benefit from equal opportunity, progression and security; personal development opportunities; understanding and appreciation of differences in cognitive processing; and the need for flexible working to accommodate life transition stages and

carer responsibilities.

- Security: Recruitment practices and Human Resources policies are included in recognition of the importance of attracting as well as retaining older workers and of the important foundation that job security, pay and progression play in leading a fulfilling life.
- Fulfilment: Most employees want to make a difference at work, to be appropriately challenged and given some autonomy which leads to growth, self-belief and high quality work. This is explored through the Listening theme.
- Respect: Our work with corporate partners will bring culture-shift by creating two-way communication, recognising and valuing contributions of everyone and allowing staff to balance work and life commitments.

2.7 Will your project have a national or local remit?

Local

If it is local, please list local authorities in which your project delivery will take place?
Please select all that apply.

Aberdeen,Dundee,North Lanarkshire



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3.1 Fund Outcomes

| | |
|-----------|--|
| Outcome 1 | Employment opportunities and progression in the workplace are improved for participant groups and consideration is given to how this can be embedded into the workplace to ensure lasting change |
| Outcome 2 | Knowledge, skills, policies and practices are improved in order to address employment inequalities, discrimination and barriers/challenges within the workplace |
| Outcome 3 | A more inclusive working environment is created and continued through employees and employers working in partnership |

3.2 Describe the project activities to be carried out and any targets for these

Age Scotland's AIM project (Age Inclusion Matrix) has been created by pooling the experience of both the Charity and our team of experienced Human Resources professionals. We have created a facilitated self-assessment framework that will help analyse all relevant aspects of an organisation to ensure they are age inclusive to an optimal level. We will support employers and older workers at each step to ensure every workplace achieves lasting benefit. There are seven steps to becoming an age inclusive employer:

1. Scope: We have identified seventeen focus areas that fall within the umbrella of "good management practices" and relate specifically to the issue of age inclusivity. These define the scope of our work.
2. Aspirations: In each partner organisation, the seventeen focus areas will be assessed to identify those likely to have the most impact on older workers.
3. Current reality: We will agree an approach with each organisation to assess the current reality as perceived by its older workers.
4. Gaps analysis and action plan: The largest gaps between aspiration and reality will be shown on a spider graph to highlight priority areas and a six-month action plan will be produced.
5. Three month progress check: At three months, progress will be reviewed and the action plan amended as appropriate.
6. Six month evaluation: At six months, we will re-assess how older workers perceive the work culture and document the changes.
7. Final report and next steps: A final report will be produced summarising activity and outcomes. Changes toward an age inclusive workplace will be assessed and measured by the older workers. This will ensure that changes are real and sustainable.

The learning from the four pilot partnerships will be used to produce an enhanced version of AIM – Age Scotland's Age Inclusion Matrix – which will then be introduced to and implemented in a broader range of organisations across Scotland, bringing wider benefits and achieving lasting impact.

Six visits by our Human Resources specialists have been allocated for each partner



organisation over a period of six months. The work will commence in May 2018 and is expected to be concluded with the final partner by the end of January 2019.

The combined total workforce in our four partner organisations, which represent a range of sectors, is around 1,400.

3.3 How will you measure that the activities you plan to carry out are being achieved?

The current reality analysis will provide the baseline measure at the outset of the project, against which progress toward Outputs (quantitative) and Outcomes (qualitative) will be fully reviewed at three and six months. The gap to be bridged informs the action plan which is shaped by identified priority areas from AIM which include recruitment practices, learning and development, age inclusion awareness, listening, flexible working, carer support, transition support, health and wellbeing, adverse health, multi-generational teams, managers and supervisors, finance and pensions, law, and human resources policies and practices.

For each partner organisation's context, Performance Indicators, linked to Outputs and Outcomes will be agreed and measured, with exemplars of good practice, revised policies, and testimonials from staff gathered as documentary evidence of the impact made. It is important to note that the change is assessed by the older workers in each organisation to ensure that progress toward attaining lasting change is real and meaningful.

3.4 What difference/change will take place for the beneficiaries as a result of your project activities?

Older workers will see progress toward age-inclusion embedded in the culture of their workplace. By working with older workers we will be able to determine where, amongst the seventeen focus areas, there is the largest gap between management aspiration and the experience of workers day-to-day, ensuring the areas where there is the biggest potential for culture-shift are addressed as a priority.

Each project lasts six months to enable our Human Resources team to make a meaningful assessment and allow our partners' management teams to fully appreciate the benefits of becoming an age inclusive organisation. A review will be conducted at three months to check progress, keep momentum going and make amendments to action plans. At the end of the project, older workers assess whether there has been a real and lasting change. They are also engaged in the development of future action plans as the organisation continues its journey towards becoming age inclusive.

Clearly, as the priorities in each of the four partner organisations will be set by the staff as a consequence of the gap analysis, we can't anticipate exactly what the specific Performance Indicators, linked to the Fund's Outcomes, will be at this stage, although the examples, below, give a good indication of the impact the project will make:

- Employment opportunities and progression in the workplace are improved for participant groups and consideration is given to how this can be embedded into the workplace to ensure lasting change.

1. Human Resources policies to be re-imagined and re-written to encourage the recruitment, progression and retention of older workers.
2. Older workers will be empowered to suggest how positive change can be embedded, relative to the Fairwork Framework.

- Knowledge, skills, policies and practices are improved in order to address employment inequalities, discrimination and barriers/challenges within the workplace.

1. Learning and development initiatives will be re-imagined in light of feedback from older workers about preferred learning styles – enabling growth and greater job satisfaction.

2. Multi-generational team working will be enabled through improved understanding of different thinking and communication styles, resulting in shared purpose and mutual respect amongst colleagues.

- A more inclusive working environment is created and continued through employees and employers working in partnership.

1. The creation of flexible working that recognises and accommodates people who are carers.

2. Line managers gain an improved understanding of older workers' needs and how they can best be met.

3.5 How will you measure progress towards achieving the changes/difference made?

Relative to the examples given in answer to question 3.4 evidence of impact is likely to come from:

- Revised Human Resources policies – comparing the difference before and after the project
- Exemplars of how change is being embedded with quotes from managers and staff
- Evaluation forms from newly introduced learning and development initiatives
- Comments from staff across the organisation about perceived culture-shift
- Reports from participants on the impact of multi-generational team working in terms of shared purpose and mutual respect
- Copies of newly introduced flexible working policies
- Training materials for line managers giving them an improved appreciation of older people's needs and how they can best be met

3.6 What will be the challenges of this project and how will you overcome them?

The main challenges of the project are:

1. How do we know the project will focus on the areas having the maximum impact?

We do this by aligning the views of management with those of older workers and drive the gap analysis. By involving older workers in the assessment, we are able to be confident we have identified the areas with the maximum impact on older workers in each organisation.

2. How do we know organisations are taking action?

We spend time with management ensuring that they appreciate where the gaps have been identified and explain to them the benefits of narrowing those gaps and the consequences of not achieving a meaningful change.

3. How do we know if a change is meaningful?

We know because we repeat the older workers assessment at the end of the project and receive this information directly from the older workers themselves.

4. How do we know a change is embedded?

We know because we have documentary evidence of Human Resources policy changes and learning and development training plans. We also know by receiving feedback directly from the older workers themselves.

3.7 How will your organisation work in partnership with other public, private and

Age Scotland has already worked in partnership with other agencies in the devising of the Age Inclusion Matrix (AIM).

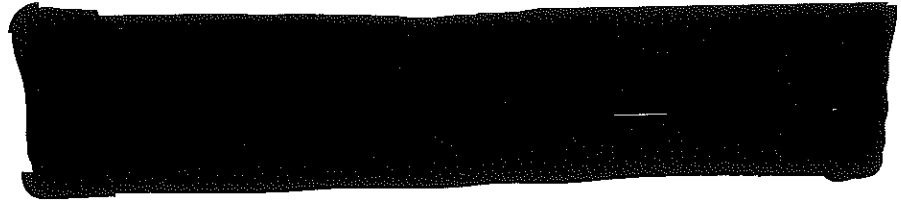


3/27/2018

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third sector organisations to achieve greater outcomes?

We are engaged with Scottish Government, Business in the Community and Edinburgh University for research purposes.



We have over 1,000 member groups throughout Scotland and gain feedback through our five Community Development Officers on the challenges that older workers face in employment.

We have also run focus groups with employed older people to understand the barriers to age inclusion.

In partnership with the Department for Work and Pensions (DWP), focus groups have been run with unemployed older people to understand how they are impacted.

All this learning has been incorporated into the latest version of Age Scotland's Age Inclusion Matrix (AIM).

Age Scotland will continue to advocate age inclusion and share best practice with other agencies engaged in such work with employers.

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4.1 How many staff will be employed on this project?

Staff Details



4.2 Tell us about the key duties, relevant skills and experience of staff to be funded by this project.

The delivery of the AIM programme will be led by Age Scotland's two Human Resource consultants who are senior professionals with considerable experience of diversity and inclusion programmes, managing culture change and building employee engagement. Working together, they will facilitate, challenge and support our four partner organisations along a journey to age-inclusion. Over a six-month period, each organisation will benefit from six on-site visits. The skills, experience and credentials of both Human Resources consultants are shown, below.

Sue Adlam-Hill: Sue's background is a 27-year international career in oil and gas HR and she is now working as an independent consultant. She has led global HR teams and supported executive leadership teams through periods of significant organisational change. She holds a psychology degree and is an experienced coach and certified workplace mediator. She brings a wealth of insight into HR issues and culture change. Her special interests are inclusion and employee engagement which she sees as a cornerstone of strong organisational performance.

Susan Gordon: Susan is a seasoned HR professional with nearly 30 years' experience in international oil and gas and as a University Senior Lecturer. Her specialism is handling the 'difficult conversations' with professionalism and compassion. Her flexibility and range of skills allow her to deliver a wide portfolio of activity including managing change, coaching and mentoring, mediation, career transition, cross-cultural issues and HR emergency response. Susan's reputation is for delivering quality solutions for uncomfortable issues through personal credibility and integrity together with a collaborative, upbeat and respectful style.



5.1

Staff Costs (excluding Volunteer costs)

[Redacted]

Volunteer Costs

No answer given

Direct Project Costs

[Redacted]

Contribution To Overheads

[Redacted]

Total Grant Requested

[Redacted]

5.2 Please tell us if there is anything we should know about the figures in the budget, include an explanation or breakdown to show how main costs were calculated.

No answer given

5.3 Is this project part of a bigger project?

[Redacted]

5.4 Can the project go ahead without other funding if the project is part of a bigger project?

[Redacted]

Please provide details:

[Redacted]

5.5 When this funding ends how will the grant continue to have a lasting impact?

[Redacted]



[REDACTED]

State Aid

5.6 It is a requirement of public funding bodies to ascertain the State aid risk in any award of public funding. Are you currently in receipt of any awards or have you received an award in the past two fiscal years?

Other funding

5.7 Do you currently receive funding from another Scottish Government Fund?

If yes, please provide details of the funding you receive. Please include Date of Award, Amount and Name of fund

[REDACTED]



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- 6.1 Will your project mainly benefit people from a particular ethnic background? **No**
- A. White *No answer given*
- B. Mixed or Multiple Ethnic Groups *No answer given*
- C. Asian, Asian Scottish or Asian British *No answer given*
- D. African *No answer given*
- E. Caribbean or Black *No answer given*
- F. Other ethnic group *No answer given*
- 6.2 Will your project mainly benefit people from a particular age group? **Yes**
- If yes, which age group? (Please select all that apply) **45-54 years,55-64 years,65+ years**
- 6.3 Will your project mainly benefit disabled people? **No**
- 6.4 Will your project mainly benefit people of a particular gender? **No**
- If yes, which? (Please tick all that apply) *No answer given*
- 6.5 Will your project mainly benefit people who identify as transgender? **No**
- 6.6 Will your project mainly benefit people who are lesbian, gay or bisexual? **No**
- 6.7 Will your project mainly benefit people of a particular religion or belief? **No**
- If yes, which specific religion or belief? *No answer given*
- 6.8 Where did you hear about this fund? **Direct email**



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| | |
|--|---------------------|
| Name | Sarah Randell |
| Position | Head of Fundraising |
| Date (dd/mm/yyyy) | 27/03/18 |
| Has this application been authorised by a Senior Management Committee member or a Trustee/Director of the Board? | Yes |
| Name of management committee member: | Brian Sloan |
| Position: | Chief Executive |



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A copy of your Memorandum and Articles of Constitution, or other governing document, signed and dated

[Redacted]

Most recent independently examined or audited accounts, or verified statement of income and expenditure (if a new organisation, most recent bank statement)

[Redacted]

A copy of your Equality and Diversity Policy if available

[Redacted]

A copy of your vulnerable adult policy if your project is working with vulnerable adults

No answer given

Excel Budget Form (from section 5)

[Redacted]

Attached Files

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]



