

DAY CONFERENCE : Tuesday 25 June 2019 : Birmingham

‘Setting the scene’ address by John Rostill, Chief Executive

WE ARE WHERE WE ARE

It is worth reminding ourselves that it was the inspiration, intuition and foresight of Irene James who was Regional Nursing Officer to the Oxford Regional Hospital Board and subsequently Assistant Secretary in the Department of Health, that established the NHS Retirement Fellowship in 1978.

At that stage, the NHS was the largest employer in the western world, over 900,000 people worked in the NHS and there were 82,000 claiming NHS pensions with an estimated 17,000 people retiring each year.

It is worth quoting from her proposal much of which still holds good today.

“There seems to be sufficient evidence in the way of precedence set by other organisations to suggest that the people who retire from the health service may gain an extra dimension in their lives if a structure existed which would allow them to develop a corporate identity and to support one another as and when required. A fellowship for retired people especially if given staff and management support would be clear evidence that the health service was playing a proper part in looking after the interests of staff over the long term and not only during their service days. The essential aim that staff who may have looked forward to the freedom of retirement should be helped if they wish to use it constructively and to avoid loneliness and disappointment”

The original objectives were:-

- a) to provide a means of establishing and maintaining friendship and assist in overcoming loneliness and worry
- b) to provide a visiting service to the housebound
- c) to enable former NHS staff regardless of grade or discipline to meet in a social and friendly atmosphere

The key aspects are:-

- extra dimension
- corporate identity
- responsibility of the health service to look after their retirees
- overcoming loneliness and worry
- all staff regardless of grade or discipline to meet in a social and friendly atmosphere

The first meeting was held at the Queens Hotel, Cheltenham on 18 April 1978 and there were 80 people present.

The National Committee was elected in June 1980, first national liaison officer appointed in 1981, initial grant of £40,000 by the Department of Health for the 18 months running, first annual conference in 1981. The Constitution was approved in 1983, registered charity November 1983. From the outset it was always recognised that the strength of the Fellowship remained at branch level and relied on continuing support from the health service.

WHAT HAVE WE DONE RECENTLY

Following the withdrawal of the annual grant from Health Education England, a national ballot confirmed members' desire to continue with the Fellowship and approval was given to raise the capitation fee to £20. Ken Jarrold one of our patrons persuaded Simon Stevens to give the Fellowship a grant of £50,000 for 3 consecutive years, which ended 31 March 2019. Ken has secured £50,000 for this year and next. The constitution was reviewed and revised in 2015 with the establishment of a Board of Trustees responsible for managing the business and the money and establishing a new National Council responsible for representing the views of members and branches and advising the Trustees.

More recently the Trustees have set up sub-committees including:-

- Remuneration - which has agreed appointment procedures, revised expenses policy and awarded a 1-year pay deal to the staff.
- Audit and Investment Committee which is in the process of reviewing all policies, established a risk register, implemented a process to change the accountants and auditors, produced a safeguarding policy and at the next meeting in July will consider an investment policy and discuss a scheme of delegation.

In October 2018 the Board of Trustees set up a small group to develop a growth plan or end of life plan for the Fellowship. This title was changed to a more appropriate "Planning for the Future" group, which will report to the Board of Trustees at its meeting in September 2019, having by then produced a draft 3-year business plan.

It is important for members to appreciate that as a charity we are bound by certain rules and regulations and although the governance arrangements may seem 'boring' and unimportant to most, its essential that the NHS Retirement Fellowship is effectively governed.

LAST YEAR

Last year we played a major role in the 70th anniversary celebrations of the NHS. There is no doubt that the wonderful stories of our members brought the anniversary to life. Whilst Ethel Armstrong, our Patron, was the star attraction, there were many other members involved in radio, television and newspaper coverage leading up to and including 5 July.

We had speakers at Westminster Abbey and York Minster on 5 July. Both events involving many officials and staff of the NHS.

We also participated in the project “NHS at 70 - the Story of our Lives” undertaken by the University of Manchester. Many of our members stories will be archived in perpetuity. Additionally, using a grant from the Heritage Lottery there were a number of heritage events organised throughout the country. Although completely different, every one of these 10 events was highly successful, increased the profile of the NHSRF locally and were attended by local dignitaries including Mayors, MPs and Lord Lieutenants. The common factor for all was individual leadership with galvanised branch support and demonstrated how effective some of our branches were.

However, despite this raised activity throughout the year, it has made no demonstrable improvement in our membership figures.

WHAT HAVE WE DONE

We have changed the website, changed the logo and have seen the results of an independent review and research project commissioned by the Trustees, which shows that the key learning points are:-

- awareness of the NHSRF is low
- proposition is generally well received
- emphasis on transactional and financial benefits
- must raise awareness much earlier in the retirement journey

The recommendations are:-

- Build awareness at a younger age
- Have a presence at NHS Retirement workshops
- New logo opportunity
- Imagery should better reflect the organisation
- Discounts can draw people in
- On-line membership draws younger retirees

- Selection of activities is crucial

AND

We attended the NHS Confederation conference in Manchester last week (19-20 June 2019), when the new logo, the new exhibition stand, new pop up banners and new recruitment leaflets were unveiled. All of which were well received by those that visited the stand including some high profile NHS leaders.

FOLLOW UP ACTION

- 1) Possible Birmingham-wide branch to be discussed with Chief Executive Birmingham and Solihull CCG and other local Chief Executives
- 2) Possible establishment of a Worcestershire branch, discussion with Chief Executive of Worcestershire Health and Care Trust
- 3) Liaise with the National Workforce Skills Development Unit, relating to a project it is undertaking as to how we can better prepare people and the services they work within in the last third of their career for retirement. The Deputy Director believes that they can use the knowledge and experience of our members in an expert advisory group
- 4) A meeting is arranged with the Health Service Journal on 9 July to discuss a lifetime achievement award for retirees (?maybe run by the Fellowship). The HSJ awards ceremony is planned for 6 November 2019.
- 5) Confirm that the NHSRF will feature prominently in the annual pensions advice leaflet from next year (it is circulated to all NHS retirees in May each year)
- 6) Confirm that reference to the NHSRF is updated, currently included in the Retirement Guidance (41 page booklet) issued to all staff on retirement.
- 7) Follow up the possibility of an advert in the total rewards statement (featured in personal ESR records accessed on line or via an app)
- 8) Meeting arranged with NHS Providers (17 July) to determine what we can do at its conference 8-9 October 2019
- 9) Attend Expo 2019 (an event mainly intended for those who want to do business in the NHS) there are complimentary tickets available for NHS staff
- 10) Try to arrange meeting with Preranha Issar, newly appointed Chief People Officer at NHS Improvement
- 11) Participate in telephone interview with Nursing Standard (Sue Williams, and a former nurse member of Walsall branch and myself) - 26/27 June. The article to appear in the August edition

OTHER ACTION

- 1) Continue to encourage members to join the membership of Foundation Trusts.
- 2) Continue to encourage members to become Governors (gives us access to the NHS locally)
- 3) Continue to encourage members to join the Patients Association (free to join and provides a wealth of current news and information)
- 4) Encourage members to each recruit 1 new member
- 5) Identify events we want to be involved in ?including Silver Sunday - 6 October
- 6) Identify dates of NHS staff conferences e.g.; radiographers, nurses, etc
- 7) Build on the outcome of research - specifically become actively involved in pre-retirement courses and make contact with NHS Trusts and the outsourced financial services organisations
- 8) Pilot innovative schemes with NHS Trusts - meeting arranged with Walsall Trust on 5 July in relation to the Trust paying capitation fee for the first year after retirement
- 9) Engage enthusiastically in the Heritage events to be organised in late 2019/2020 in the North East, North West, East Anglia and South West.
- 10) Determine continued involvement in the withdrawal of the TV licence concessions. A campaign to reverse the decision co-ordinated by Age UK.
- 11) Encourage those members eligible to apply for pensions credit
- 12) Determine what action to take when the outcome of the judicial review related to WASPI is announced
- 13) Reach agreement to enter into more formal arrangements with partners including:-
 - Age UK
 - Patients Association
 - Institute of Health Care Management
 - National Association of League of Friends (ATTEND)
- 14) Consider which other organisations to liaise with
- 15) Contact all NHS organisations seeking their help in publicising NHSRF via staff intranet, newsletters, pre-retirement courses, other events, AGMs etc
- 16) Recruit to current vacancies - 3 external Trustees, 6 Regional Representatives
- 17) Determine if Development Officer coverage is sufficient and equitable

FINALLY

Reverting back to the proposal by Irene James it is clear that the future of the Fellowship very much relies on the support of the NHS (nationally and locally) and the enthusiasm, commitment and engagement of branch members.