

***Sisters of Charity of
Jesus & Mary Services***



Annual Report 2011



Reporting on year 01/01/2010 - 31/12/2010

Chairperson's Foreword

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**Sr. Mary Anna
Lonergan,
Chair, Board,
SCJMS**

2010 compounded the very significant management challenges of 2009. Nonetheless, we got through the year relatively unscathed and even managed to progress some significant initiatives, particularly in respect of designing individualised support packages for people.

The progress made in advancing the governance arrangements from the congregation to the MuirIosa Foundation were particularly encouraging from my perspective.

I would like to take this opportunity to convey gratitude and appreciation to my fellow board members, to the CEO and his Management Executive Team – and to the 50 plus local managers who have been so to the fore over the past year in enabling us to stay afloat and healthy during these straitened and uncertain times.

Signed:

Sr Mary-Anna Lonergan

Chair

SCJMS / Muiriosa Foundation Board



The diminishing level of government revenue available for funding public services continued to dominate everybody's attention in 2010, as it had throughout 2009. Our funding allocation was cut by just under €1.1 million in 2010 which was *on top of* €1.09 million in 2009 - these cuts in allocation were separate from the allocation cut relating to the reduction in public sector salaries (which impacted on each member of staff). As we had harvested whatever "low-hanging fruit" linked to the non-pay side of our budget (heat, power and light; insurance; maintenance; transport etc) during 2008 and 2009, the concentration in 2010 was on securing savings on the "pay" side. This resulted in measures such as freezing of recruitment; requiring sick leave and maternity leave to be covered by re-deployment from existing staff members; capping the numbers of hours each temporary relief employee could work; reviewing the pattern of premium pay usage on weekends, particularly on Sundays (which attract "double time" payment). As you will see from our financial report, these cost-control measures were broadly successful, limiting the trading deficit for the year to €31,703. By far the most influential factor in achieving this level of efficiency was the reduction in our overall whole time equivalent employment number from **741.99**, as per 31.12.2009, to **718.89**, as per 31.12.2010, a net reduction of 23.1 WTE.

HSE introduced a "voluntary exit package", combining both voluntary redundancy and early retirement options, in late 2010. This resulted in a loss of 14 further positions - these 14 are not captured in the whole time equivalent metric of 718.89 as per 31.12.2010, as they were not deemed to formally have exited the service until 1.1.2011.

There is much reference in the media to bloated numbers of people in the health sector being employed within managerial and administrative grades. It is interesting to note that while we are reporting 67.45 WTE employed in managerial and administrative positions at the end of 2008, this figure has now effectively dropped to *53.73, i.e. a drop of 20% in the numbers employed within managerial and administrative grades over the past two years. (As of the 1.1.2011, 7.4% of staff were employed in managerial and administrative grades.)

* Approximately half of the 14 people who availed of the "voluntary exit scheme" were from managerial and administrative grades. The above calculation takes account of this particular cohort.



Brendan Brodeick
CEO



The relentless focus on *efficiency* which was necessary throughout the year was counterbalanced by a parallel focus on safety and quality. Whereas formerly we may have been prone to loosely correlate quality with staffing ratio, changing times and circumstances have required us to more closely examine our assumptions about quality. Our position is that quality is embedded within those opportunities and supports which add value, particularly those opportunities and supports which add *enduring value*, to the life of the service user. Planning and consultation processes which establish a shared sense of what is really important to the service user, goal-directed management, and competent risk management are the key factors which drive quality. Drawing a sense of comfort and assurance from staffing ratios is an unreliable proxy for quality.

One of the main highlights of the year was a “quality uplift” event in Moore Abbey on September 16th 2010. This event focussed on presenting the story of service users who had experienced a significant quality enhancement in their lives in recent years - the scale of quality-uplift in the case of six of the stories presented was deemed to have had a *transforming impact* on the service user’s quality of life. The centre-piece of each presentation was a 15-20 minutes DVD, supplemented by interviewing a panel of those most closely involved. The common threads running through these stories were:

1. Taking the lead from the service user;
2. Having a strong vision and a clear sense of purpose and focus;
3. A careful but courageous approach to risk taking and risk management;
4. Local leadership;
5. Designing, implementing, and sustaining individual supports for the service user rather than seeking to wedge him or her into existing group-based programmes.

2010 was also the year in which our fledgling person-centred wing really took flight. The person-centred wing was established to enable us to acquire the competencies and capacities to respond to those service users and families who want to put in place arrangements that faithfully and fully reflect the principles of person-centred practice, i.e. service users and families who are looking for an alternative to traditional group-based arrangements centred on programmatic responses (i.e. “day” programmes, residential programmes, respite programmes etc).

By a full and faithful realisation of the principles of person-centred practice, we commit ourselves to making sure that

1. The agenda everyone is working to is the agenda set by the person;
2. This agenda is informed by a clear and appropriately ambitious vision of the life the person wants for himself / herself;
3. The arrangements which are put in place are **individualised arrangements**, based *exclusively* on what the person needs. The focus is on building a life **in the real everyday world**, *not within a parallel service-based world*.



The person-centred wing is directed by Josephine Glackin and is supported by six co-ordinators. Over the course of 2010 very significant work was undertaken with 15 people. We were very encouraged and buoyed by the scale and pace of progress made. One of the core factors in the success of this initiative has been the implementation mentoring provided by Hope Leet Dittmeier from Louisville, Kentucky, USA - Hope runs a similar initiative in Kentucky and her detailed and practical guidance during her week-long quarterly visits was of incalculable benefit in accelerating our learning. (Hope's involvement was generously sponsored by the *Genio Trust*.)

Significant progress was also made in advancing the governance transfer of the services from the congregational structures of the Sisters of Charity of Jesus & Mary to the *MuirIosa Foundation*, an incorporated body. While the intention to ultimately effect this transfer was initially conveyed to the Department of Health and Children in the mid-1990s and gathered significant pace in the early years of the new millennium with the appointment of an interim-advisory board, progress was significantly overshadowed by the vicissitudes of a defined-benefit pension scheme of which circa 50 of our longest-serving staff are members. Progress in addressing this particular issue was greatly advanced in late 2009, enabling significant advances in 2010 in identifying the issues to be addressed and developing proposals which have secured the board support of both the congregation and the board of the Foundation. (It is envisaged that the technical and formal aspects of effecting the transfer will be completed during 2011. January 1st 2012 is the target date for the formal transfer.)

Other noteworthy happenings in 2010 included the upgrading of the Guardian Angels Unit at Moore Abbey; winning the tender to succeed HSE as the provider of children and adult respite services in Mullingar; the refurbishing of properties in Westmeath with a view to progressing the next phase of the Southill Transfer Programme — which will reduce the numbers at Southill from 36 to 19; the successful implementation of a number of single-person arrangements for some South Kildare service users — this work took place outside of the context of the person-centred wing and involved service users with complex needs for whom group-based arrangements were not working out, either for themselves or for those living alongside them; securing funding under the EU's *Leonardo* Programme (Lifelong Learning) for a staff-development / staff-training initiative focussed on sensitising staff members to the rights of citizens with intellectual disability and how these rights can be casually displaced and abridged



in service-delivery contexts—our partners in this project are a fellow Sisters of Charity of Jesus and Mary organisation, *Hagewinde* from Lokeren in Flanders, Belgium and a parents and friends organisation in north-west Bulgaria in the town of Vidin (near the Romanian and Serbian frontiers).

Signed: 
Brendan Broderick
CEO



**SCJMS/
MF**

Service activity Levels

SERVICES PROVIDED	REGIONS			TOTAL
	WESTMEATH/ MEATH	LAOIS/ OFFALY	SOUTH KILDARE	
RESIDENTIAL				
Community-based	50	63	62	175
DAY SERVICES				
Adults	137	148	149	434
RESPIRE:				
Children	22	48	N/A	70
CLINICAL SERVICES:				
SPECIAL SCHOOLS				
PRE-SCHOOL	10	19	N/A	29



AS AT 31/12/2010

Overall organisation

718.89 Whole Time Equivalents (WTE), (headcount – 937)

South Kildare

302.61 (WTE), (headcount – 382)

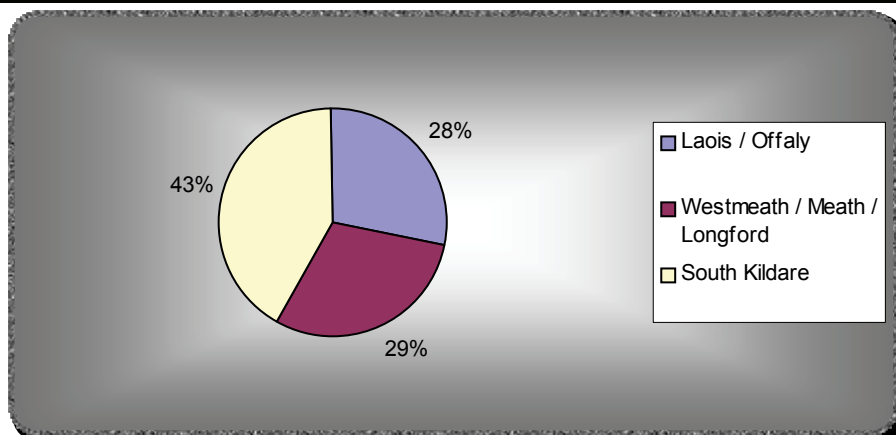
Laois/Offaly

204.32 (WTE), (headcount – 281)

Westmeath/Meath/Longford

211.96 (WTE) (headcount – 274)

WTE Staff	South Kildare	Laois/Offaly	Longford/Westmeath	Total SCJMS
Management/ Administration	32.69	17.17	10.34	60.20
Nursing	63.54	44.83	29.55	137.92
Health & Social Care	66.83	75.37	64.91	207.11
General Support ser- vices	36.41	3.45	18.83	58.69
Other client care	103.14	63.50	88.33	254.97
	302.61	204.32	211.96	718.89



SISTERS OF CHARITY OF JESUS & MARY COMBINED SERVICES

For the year ended 31st December 2010

Revenue Account
Without the effects of *FRS 17

	€
Pay Expenditure	39,194,419
Non Pay Expenditure	<u>6,754,536</u>
Gross Expenditure	45,948,955
Income	<u>4,473,013</u>
Net Expenditure	41,475,942
Approved Allocation	<u>41,444,239</u>
Surplus/(Deficit)	(31,703)

Narrative Summary

The organisation commenced 2010 with a cumulative reserve deficit of €71,095. The deficit attributable to 2010 “trading” was €31,703. Thus the cumulative reserve deficit for the year beginning 01/01/2011 is €102,798

* The reference to FRS 17 (i.e. Financial Reporting Standard 17 which relates to profiling pension fund assets and liabilities) relates to a defined benefit scheme with 45 members. The figures quoted above do not include the pensions-related factor attributable to this defined benefit scheme.





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