



**Suffolk Association of  
Voluntary Organisations**



## Fit For Change

**Conference Report: 10 October 2011**

## Foreword

### Staggering, but still on our feet?

If you listened to nothing but news broadcasts, the pall of gloom over the country would be almost tangible. In contrast, at **Fit for Change**, SAVO's Annual Conference, many of those attending felt that the economic crisis had created opportunities for services to change for the better.

Donald Ritchie, our keynote speaker from the National Council for Voluntary Organisations, outlined the Multi-Crunch we faced of economic downturn, public spending cuts and diminishing resources from our other sources of income. He outlined a positive approach to addressing this 'perfect storm': robust management that emphasised our strategic impact; keeping vision and mission firmly to the forefront; good leadership and decisiveness; keeping to good practice; and strong financial management.

The Conference was also the first opportunity for Suffolk County Council's new portfolio holder for the VCS to outline his vision of the challenges of change. Colin Spence described the aspiration of strengthening the County Council's relationship with the VCS, with the circumstances and the environment making this a necessity not a luxury. Exploring the Government's agenda, Colin Spence talked about how localism meant that individual, neighbourhood and commissioned services needed to be very responsive to the local needs of local people - the Council calling it 'Our Place', with their role being more facilitative and engaging of communities. He described the challenge Suffolk faced as 'uncomfortable and unsettling', but shared the sentiment emerging at the conference that this was a time when new ideas could be implemented and new approaches adopted.

So, is the voluntary sector in Suffolk fit for change? Probably it is a case of it has to be, because change is already underway and transforming the landscape we have worked in for many years. The flexibility and resilience of staff and volunteers is being tested, but the mettle so far is matching the challenge. Those most at risk of a battering in the ring, are those that are not in there fighting their hardest. Perhaps we should introduce a Lonsdale Belt for surviving the multiple rounds of change being thrown at us?



**Jonathan Moore: Chief Executive SAVO**

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October 2011

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## The purpose of Fit for Change

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**Fit for Change** took place on 10<sup>th</sup> October 2011 as part of the SAVO AGM, bringing together voluntary and community organisations and public sector staff to explore the issues, threats and opportunities that are currently affecting the VCS, and equip people to make the necessary changes happen.

SAVO operates under three key strands, and each of these had a role at the event:

### Influencing

- ⊕ gathering information, viewpoints and opinions from a range of Suffolk's voluntary and community organisations and public sector partners
- ⊕ understanding the key issues for change that are impacting on the VCS
- ⊕ gaining a snapshot of how VCS and public sector partners view each other
- ⊕ for SAVO to gather a mandate on the big issues around the necessary changes needed for Suffolk's VCS

### Developing

- ⊕ discovering the types of support, advice and guidance that VCS organisations need in order to implement change
- ⊕ to make organisations aware of SAVO's products, projects and services available that can help achieve their aims
- ⊕ to discover what new (or existing) tools there are on offer for VCS organisations

### Connecting

- ⊕ offering network opportunities for VCS and public sector partners to get together and share ideas
- ⊕ offering a platform for people to find out more about activity within the NHS, current strategies for developing infrastructure and national perspectives on change in the VCS.





## 'Fit for Change' - Speech by Cllr Colin Spence, Portfolio Holder for the Voluntary Sector with Suffolk County Council

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Thank you for the opportunity to share some thoughts on your topic, fit for change. The Suffolk Association of Voluntary Organisations is a valued and trusted partner of SCC. Over the past 12 months, in some very difficult times, I think we have strengthened those links, had some very robust conversations and developed an open and positive relationship which continues to develop.

For those who do not know me, I am Colin Spence, Portfolio Holder for Public Protection at Suffolk County Council and I am delighted to have been asked by the Leader Mark Bee to take on the additional role of strengthening the County Council's relationship with the VCS and to help take it into a new era.

As well as this role, I also hold a responsibility for Councillor development at the County Council which is focused on supporting our Councillors in the rapidly changing local government landscape. My view is that Councillors have a critical role to play in helping to assimilate change in Suffolk. We need everyone to play a part in guiding our communities and those we represent through the maze of public sector reform. I really do believe that as community representatives we have an essential role to help make sense of the complexities with which we all grapple and we are a key channel for communication and feedback. I would encourage all those here today to engage with your local Councillors and help them in their task.

As you will know, 'change' is a theme that is familiar to us in public services as we look at the role of local government and wider public services in the current environment. It would be fair to say (and I am the first to acknowledge) that we at the County Council have had some difficulties in expressing our plans for change which need to shape our future direction. However we are clear about what we see at the heart of good local government:

- Value for money public services
- Listening to and empowering communities
- Stimulating growth and economic development
- Working in partnerships with other local authorities, health, police, the business sector and the voluntary and community sector.

We will look to reflect this in everything we do and before I talk about this locally, I'd like to reflect on some key aspects of the national picture which has been set by the Government and upon which we are required to shape the way we approach things locally. The challenges we are facing as a country are considerable and Suffolk is in no way immune to these challenges. As well as

the tough economic conditions for our country's business sector; the public and voluntary sectors have reached a point where simple restructuring and 'shaving' budgets will simply not be enough.

Many of you may have heard the government talk about its approach to transforming public services. They describe it as follows:

**Localism** is the ethos - doing everything at the lowest possible level and only involving central government where necessary

**Decentralisation** is the process - giving power to individuals, professionals, communities and local institutions

**Big Society** is the vision - A society where people, neighbourhoods and communities have more power and responsibility and use it to create better services and better outcomes."

We hear a lot about big society, but the second half of the sentence is **small government** and it is important that this is not lost in our local considerations.

Most recently the government has published its Open Public Services White Paper. This contains more information about the vision for public services, is perhaps light on detail at this stage, but it does draw attention to some very important information for us all. You'll be pleased to know, and I am sure relieved, that I'm not going to talk you through the White Paper, and I'm not even going to talk about the principles. I just want to dwell for a moment on the descriptions of services included in the Paper - which we have been working on in our local public service provision, with many elements of the voluntary sector for some time and this will continue.

The White Paper talks about individual, neighbourhood and commissioned services:

- Individual services - are personal services - for example in education, skills training, adult social care, childcare, housing support and individual healthcare - that are used by people on an individual basis.
- Neighbourhood services - these are services provided very locally and on a collective, rather than an individual, basis - such as maintenance of the local public realm, leisure and recreation facilities, and community safety.
- Commissioned services - these are local and national services that cannot be devolved to individuals or communities, such as tax collection, prisons, emergency healthcare or welfare to work.

These distinctions are important and fit with our local thinking around the personalisation agenda, 'our place' and contracting and procurement for services and I will return to this later.

I can't talk about the national picture without mentioning money. Public services face an unprecedented reduction in their grant from central government - we have had to save £43m from our budget in 2011/2012 and have to save a further £50m over the next 2 years. This is an area where we are currently seeking views to inform the difficult decisions we have to make. We have published a budget consultation survey with a link from the front page of the County Council's website and I would encourage you to complete this survey - we want to hear from as many people as possible. If you would like hard copy surveys, please let me or your County Councillor, or a Council Officer know and we will arrange this.

All these factors together mean 'change' is inevitable, and it is essential. It is always uncomfortable and unsettling, but at the same time means we have an opportunity to implement new ideas and forge new ways of working whilst protecting what we know works well in Suffolk. So, what does this mean to our relationship? A strong voluntary sector is important to Suffolk and Suffolk CC. With all this change, it is worth reminding ourselves that we all signed up to some ambitions for Suffolk by 2028:

- To become the most innovative and diverse economy in the East of England;
- To be the county with the greatest reduction in carbon emissions;
- To create a place where everyone is safe, healthy and involved no matter who they are or where in the county they live; and
- To have learning and skills in the top quartile in the country.

These ambitions still hold true for us - they are our vision.

In terms of the 'how' and what change means locally, I just wanted to highlight a couple of rapidly changing areas:

Firstly, markets for services. The White Paper talks about 'commissioned services' and we have many of these. In many areas of our work, the majority of the provision is not provided by the Council and our interest is in ensuring quality and sufficiency of provision. The role will continue to grow and we will look to develop new markets for services and shape existing markets through influence and investment. The NSD failed to connect with people - it was a one-size fits all and we have to be more sophisticated about the services individuals and communities want and need. Your involvement, both as service deliverers and infrastructure support organisations, in helping us to shape this agenda is essential.

Secondly, the capacity building work you do, both to support organisations in your sector, but also to support local communities is growing in importance. I know that a number of organisations have been involved and continue to be influential in the Our Place initiative. For those who have not heard of our place, this is very much about communities and neighbourhood services and how we encourage local communities to support one another and use their local resources and assets to meet their needs locally. This includes taking on responsibility for service delivery and delivering local outcomes. We are committed to this agenda and know that you are right along side us in this work.

And finally, representation. You are a respected and listened-to voice in Suffolk. We believe the Congress is an important and potentially transformational development for Suffolk. And, alongside the national Transforming Local Infrastructure initiative, we have a tremendous opportunity in Suffolk to deliver a sustainable change to the voluntary sector. We stand ready to help you achieve your ambitions.

In terms of my priorities for working with the sector, I am committed to preparing and delivering a shared agenda for change. In this regard I have attended an initial meeting with members of the sector's Congress Organising Group (a group of organisations who have committed themselves to facilitating the activities of The Suffolk VCS Congress). It was clear from the excellent contributions made by voluntary sector colleagues during that meeting, that they recognise the need for the relationship between Suffolk County Council and the VCS to be reconfigured. I also welcomed the message that came consistently and strongly from around the table at the meeting, that preparation and delivery of the change agenda in question should be based on the principle of genuine partnership.

As far as next steps are concerned, I wrote to VCS Congress colleagues earlier this month suggesting that a planning workshop be convened in order for work to start in earnest, on preparing the shared agenda, based on joint priorities that will shape our work going forward. This offer was accepted and arrangements for the workshop are now being finalised.

I know members of the Congress met with our Management Board earlier in the year and they have been working together on issues such as Our Place and procurement. I wanted to conclude by sharing with you some of the principles/values which came out of that meeting and that I think will be incredibly important as we move forward together.

- Eliminate duplication - where we identify duplication, we will look to eliminate it and co-produce a better solution;

- Mutual trust and respect - we hold different agendas and different views and this has to be respected, but we have a shared belief in wanting to make things better for the people of Suffolk;
- Recognising diversity - in every sense of the word, we need to recognise the diversity of Suffolk;
- Shared risk and responsibility - we know that new approaches bring with them greater risk and different accountabilities and responsibilities. We are committed to working through this together;
- Engagement and co-production - this is our preferred means of working and we will look to design solutions to problems together;
- Sharing knowledge - any solutions need to be informed by knowledge that exists in both sectors and we need to learn from what works and what's useful; and
- Learn as we go - it is a bumpy ride, there is no blueprint and some of this is about overcoming barriers and obstacles as we come up against them.

I know we are already working well together. We value your support, engagement and constructive criticism. Please continue to try to understand our agenda and challenge us where you think we are doing things wrong. We don't always get it right and there will be times when we disagree on the best way to take these things forward.

However, I know we want the same thing. Transforming Suffolk states 'By 2028 we want Suffolk to be recognised for its outstanding environment and quality of life for all; a place where everyone can realise their potential, benefit from and contribute to Suffolk's economic prosperity, and be actively involved in their community' - I look forward to working with you to achieve this ambition in a county we all care deeply about.

Thank you.

**Cllr Colin Spence**




## 'Fit for Change' A national perspective by Donald Ritchie, Strategy and Impact Adviser at NCVO

Donald spoke passionately about the opportunities for the VCS in the next few years, highlighting that, although there is less funding available, there is still many opportunities for VCS organisations to thrive in the current climate.

The following slides are of his presentation:

National Council for Voluntary Organisations  
giving voice and support to civil society




**fit for change**

SAVO AGM, October 6<sup>th</sup> 2011

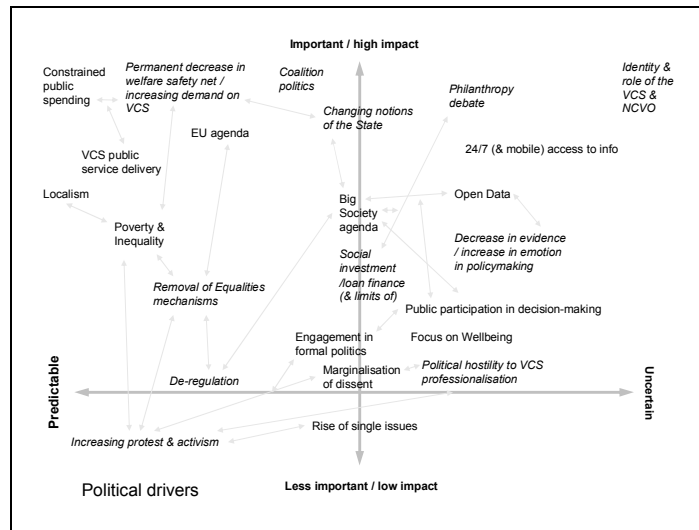
*Donald Ritchie, NCVO*

National Council for Voluntary Organisations  
giving voice and support to civil society



**Over the next 15 minutes ...**

- 3 major trends
- A regular workout
- Shaping up for change



National Council for Voluntary Organisations  
giving voice and support to civil society

ncvo

## 3 major trends

**The Multi-crunch**  
Economic downturn, public spending and natural resources

**Coalition Government policy**  
Big Society, public service delivery and localism

**Technology and Power**  
Open data, impact and falling hierarchies

National Council for Voluntary Organisations  
giving voice and support to civil society

ncvo

## Your regular workout

*Things to work on all the time, especially during times of change:*

**Strategic impact**  
Know what it is, and keep it fresh

**Vision and mission**  
A shared understanding, including what can and can't change

**Good leadership**  
and effective decision-making mechanisms

**Policies and procedures**  
Are they comprehensive and up to date?

**Financial management**  
Know all of your costs, and manage them

## Anticipate change

- Understand your key strategic drivers
- Develop scenarios for likely and significant changes
- Identify responses to the scenarios, and your favoured options
- Put in place plans for reasonable contingencies
- See: [www.3s4.org.uk](http://www.3s4.org.uk)



## Know your change managers

- The key parts of your organisation need to be ready to manage change
- For example: people responsible for HR, finance, premises, facilities, etc
- Be subtle!



## Think about how you'll manage change

- A resonant and evidenced vision for change ... and a path to implementing it
- A robust and inclusive process that engages stakeholders
- An understanding of how change plays out ... including dealing with sensitivities and conflict



## Keep talking

Sensitive and timely communication that is:

- Pitched to the needs of your key audiences
- Clear and consistent
- Covers what you know and what you don't




## Thank you!

- We can help you more, through NCVO Consultancy:  
<http://www.ncvo-vol.org.uk/consultancy>
- Keep in touch: [donald.ritchie@ncvo-vol.org.uk](mailto:donald.ritchie@ncvo-vol.org.uk)

## Interactive Session Results

All the delegates were given interactive voting buttons and asked to respond to a number of questions, from their own viewpoint of either a Voluntary Sector or a Public Sector Representative.

### Suffolk Snapshot




Suffolk Association of Voluntary Organisations

- SAVO is interested to know the state of the sector at this moment to capture a snapshot of the main things you are all tackling
- Voting in this session is anonymous
- Only answer questions for your sector, Public or VCS
- Please select the nearest answer for each question
- You can change your answer whilst the voting session is open

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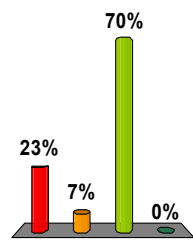
### Public Sector and VCS

Thinking about the services we all deliver to the residents of Suffolk, which statement do you feel most strongly reflects your opinion?



Suffolk Association of Voluntary Organisations

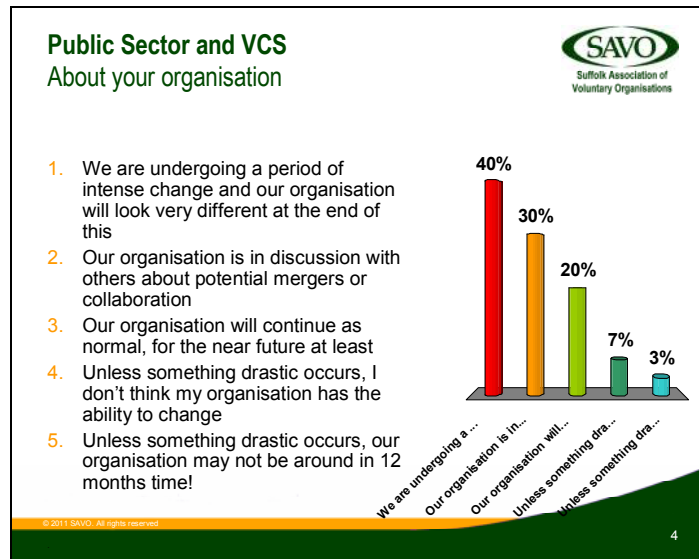
- I am concerned about the effect of recent economic changes and savings on the quality of services delivered in Suffolk
- I think things will get worse before they get better, but they will get better
- The current economic crisis has created opportunities to review how services are delivered and make changes for the better
- I think Suffolk is in a much better position to weather change than other counties.



Statement	Percentage
1. I am concerned about the effect of recent economic changes and savings on the quality of services delivered in Suffolk	23%
2. I think things will get worse before they get better, but they will get better	7%
3. The current economic crisis has created opportunities to review how services are delivered and make changes for the better	70%
4. I think Suffolk is in a much better position to weather change than other counties.	0%

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The overwhelming viewpoint was the positive driver for change that the current economic crisis has brought about.



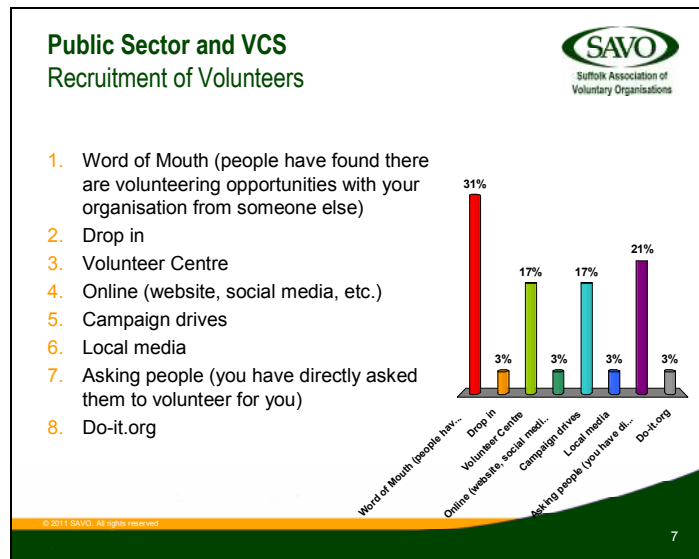
It was evident that both the Public and Voluntary Sector were undergoing a period of intense change, in terms of restructuring, mergers, collaborations, new contracts or simply looking to deliver services in a different way.



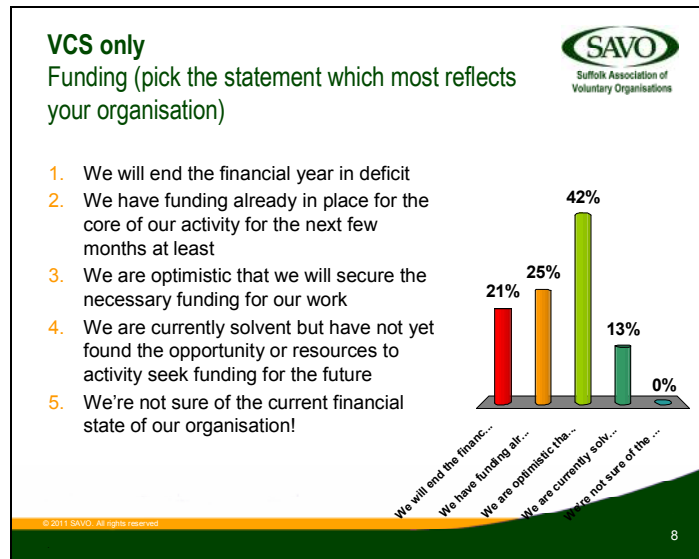
This was an interesting result, in that the Voluntary Sector has experienced a range of different scenarios with their staffing, losing some staff but gaining new members to new projects.



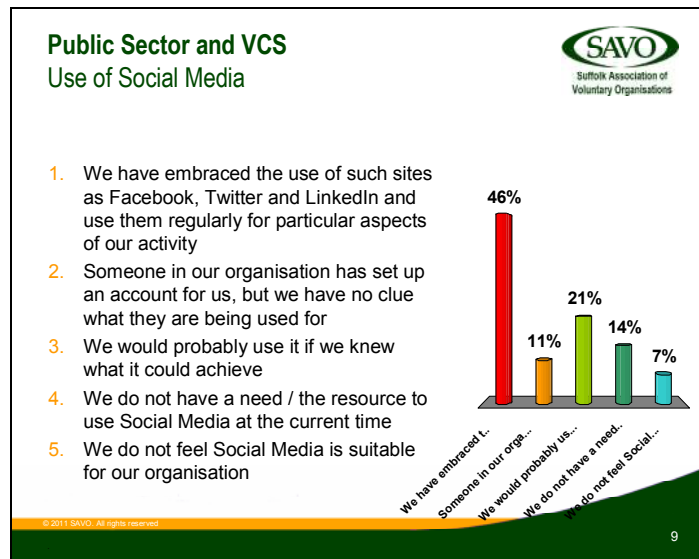
Both Sectors reported an increase in volunteer recruitment from last year, but interestingly, contrary to general concerns, none of the delegates surveyed has replaced paid staff with volunteers.



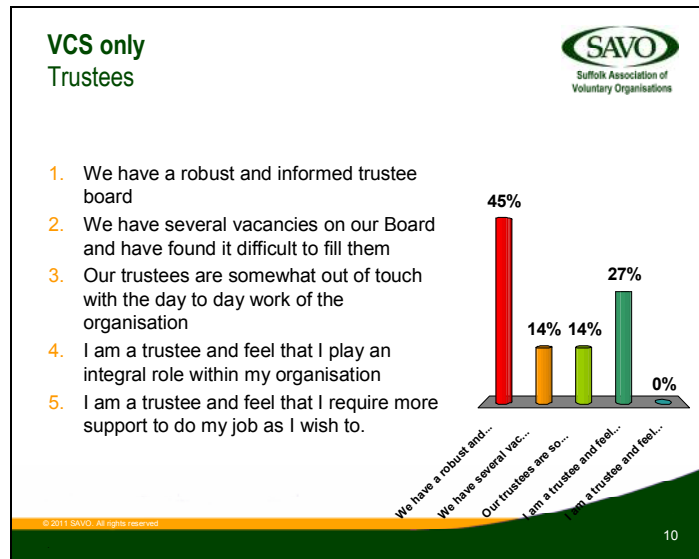
As with the national trend, word of mouth is still the most popular way that people are recruited to volunteer.



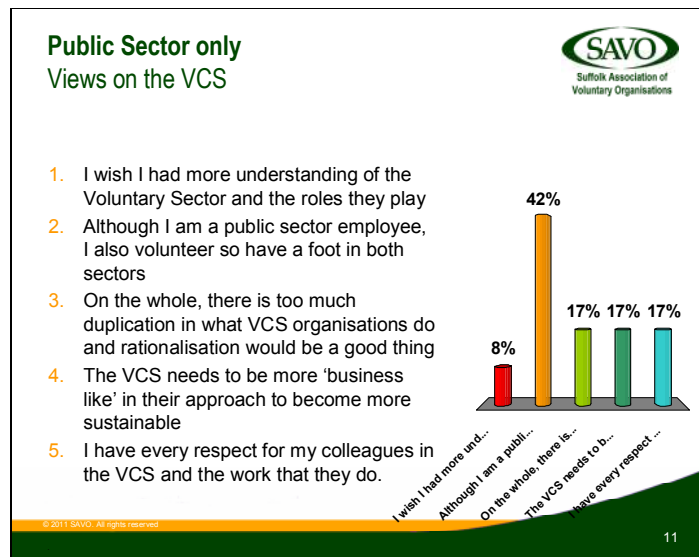
Nearly half of voluntary organisations were generally optimistic that they would be able to secure funding for the year ahead, though just over 20% will end the year in deficit.



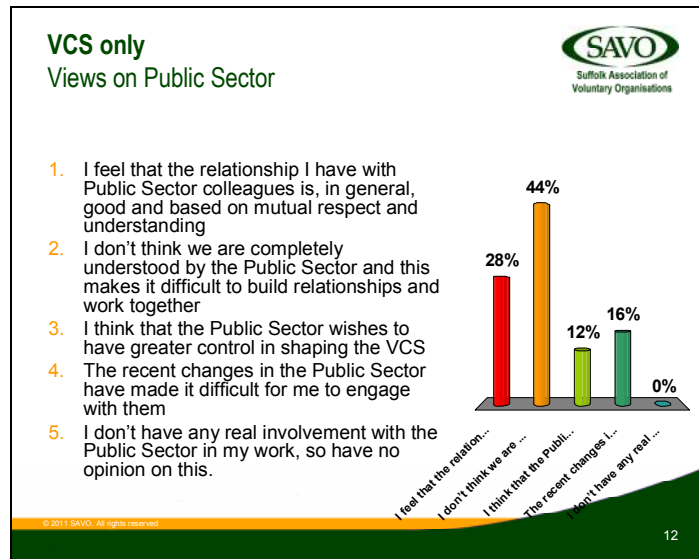
Surprisingly, just under half of organisations present had already embraced Social Media as a tool to promote their activities and engage with people online. The other half had concerns about how to use it and its suitability.



Happily, nearly half of organisations cited that they have an informed and robust trustee board, with 27% present being trustees themselves happy in their role. A small percentage wished their trustees were more in touch with the work of their organisation and the same amount (14%) noted they had unfilled vacancies on their Boards.



Interestingly, nearly half of those public sector representatives present were also volunteers, so there is a blurring between the Sectors. The spread of the other answers were similar and there were a range of views present.



The VCS , on the other hand, in general felt misunderstood by the Public Sector and had difficulties in engaging with them. Although over a quarter were happy with the relationships they had in place.

The results, although a snapshot of those present on the day from 32 representatives, helps to give a general flavour of the feelings and issues felt by both the Public and Voluntary Sector at the current time.

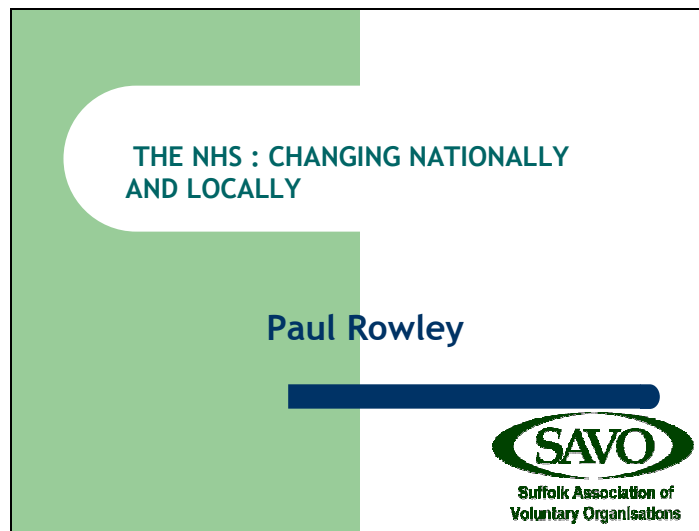
## Feedback from Workshops

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### Workshop 1

There were two workshops available for representatives to attend. The first was entitled, 'The NHS in Suffolk - future impact on the VCS' and was presented by Paul Rowley, a SAVO volunteer interested in the relationship between the NHS and the VCS, and Maddie Baker-Woods, Interim Deputy Director of Primary Care for NHS Suffolk. Their joint presentation covered how the changes to the NHS will impact on the VCS, including how the introduction of Clinical Commissioning Groups may affect the Sector's work.

The following slides are a copy of the presentations given.



## Original NHS change proposals:

- mixed reception
- patient power (“no decision about me ,without me”)
- GPs to commission 80% of health care
- Opening up market to “any willing provider”
- Structural change :
  - x – SHAs and PCTs abolished
  - x – NHS Commissioning Board set up
  - x – Monitor established
  - x – Health and Well Being Boards set up in Councils

## Opposition and the listening pause

- Opposition:
  - privatisation
  - GPs loss of independence/lack of competence
- The Pause:
  - 2 months pause and body to suggest amendments
  - after pause report argues for modifications:
    - x – more rights to patients and public
    - x – GP commissioning replaced by Clinical commissioning
    - x – CCGs to operate WHEN ready
    - x – any QUALIFIED provider
    - x – contracts let on quality not price
    - x – more integration and collaboration
    - x – more duties to HWB Boards

## Opportunities for VC Sector:

- Representational
- Providers

## Transition in Suffolk

Maddie Baker-Woods  
Interim Deputy Director of Primary Care



### 3 of the key changes in the next 12-months

- Clinical Commissioning Groups
- Any Qualified Provider
- Healthwatch



### Current Consortia

- **IPSCOM**
- GP Chair: Dr Imran Quereshi
- 15 practices covering 164,000 patients
- **West Federation**
- GP Chair - Dr Christopher Browning (GP Long Melford)
- 25 practices covering 234,000 patients
- **East Federation**
- GP Chair - Dr Mark Shenton (GP – Stow Health)
- 27 practices covering 221,000 patients



## Key Developments following the Pause



- Clinical commissioning groups
  - Nurses
  - Carers
  - Patients
  - Secondary care doctors
  - Lay members (who may be chair)
- CCGs not to cross local authority boundaries
- Slower timetable allowing authorisation by April 2013 or shadow consortia to continue



## Next Steps



- Agree configuration of the statutory CCGs in Suffolk
- Align activities and resources to agreed structures
- Assessment process



## Assessment domains



- Clinical focus and added value
- Engagement with patients and their communities
- Clear and credible plan to deliver quality improvement within financial resources
- Capacity and capability to deliver their responsibilities, including delivery of financial control
- Collaborative arrangements for commissioning with other consortia, local authorities and NHSCB
- Leadership capacity and capability



## Extending Patient Choice Any Qualified Provider 'Long List' of Opportunities



- Lymphoedema (west of Suffolk)
- Electro-Cardiograms – 24 hour tape reading
- Vastectomies (non General anaesthetic)
- Ultrasound (west of Suffolk)
- DESMOND (diabetes education)
- Carpal tunnel
- Community Audiology
- Echocardiography
- Sleep Apnoea
- Respiratory education



## Local Healthwatch



- Retain existing LINK powers i.e.
- Promote patient and public involvement
- Seek views of services and feed back to commissioners
- Rights to enter and view provider services
- Comment on changes to local services



## Additional functions



- Support individuals to exercise choice
- Replace signposting service currently provided by PALs
- Health complaints advocacy
- Reports about quality of local health and social care to Healthwatch England
- Member to sit on Health and Wellbeing Board
- Constructive relationship with CCG(s)



## Suffolk HealthWatch



- Awarded national Pathfinder status (with 72 others) from Sept 2011
- Suffolk focus: Strengthening and Streamlining Voice
- Based in two areas Ipscom and West
- Suffolk County Council – lead body



## Workshop 2

### Supporting Change in the Voluntary & Community Sector

The second workshop was an opportunity for organisations to explore the themes of 'Collaboration and Merger', both in light of current changes to Suffolk's infrastructure and take part in a role-playing exercise to determine the challenges collaboration and mergers can bring.

#### Session 1:

A bid to the Big Lottery is being prepared by 18 of Suffolk's VCS infrastructure support organisations which has to be submitted by the end of October. As part of the evidence to support the bid, a survey has been undertaken with front line VCS organisations to seek their opinions about current usage of infrastructure support services and how these services could be improved in the future.

The top rated answers are given below and representatives who attended Workshop 2 were asked to give their views on these answers and give specific examples of why they agreed, or disagreed with them.

#### What barriers to accessing support for your organisation, if any, have you encountered?

Each group was asked to rank their top three barriers, with 1 being the highest and 3 the lowest.

Barrier	Group 1	Group 2	Group 3	Group 4	Group 5
Lack of knowledge of who to contact and what is available where		1	2	1	1
Transport/geographical difficulties make it hard to access support	2	2			
Insufficient time to access support	1		3		
Cost of getting support		3			2
Knowledge level of advisor				Joint 2	
Lack of understanding of organisation's needs	3		1	Joint 2	
Lack of funding					
Little availability in local area					3

**What does your organisation see as being the key things that need to happen to transform and improve infrastructure support in your part of Suffolk?**

Ranked from highest 1 to lowest 3

Key things that need to happen	Group 1	Group 2	Group 3	Group 4	Group 5
Amalgamation of organisations to have less duplication				Joint 1st	
Simpler/fairer access to funding/more funding support		3			3
Partnership/collaboration facilitation	3	1	1		1
Local provision of support	1	2		3	
Specialist sources of knowledge			3		
Shared learning/regular information updates					
Better communication with statutory services re their needs	2		2		2
Single point of access				Joint 1st	

**Where would you like support for your organisation delivered?**

Ranked from highest 1 to lowest 5

Type of Support	Group 1	Group 2	Group 3	Group 4	Group 5
At an local office in nearest town or neighbourhood	1	2	4	5	4
By a visit to your organisation	2	3	1	3	3
Web based	3	1	2	1	5
By ringing a countywide telephone number	5	5	5	4	2
At centralised locations, e.g. Bury St Edmunds, Ipswich or Lowestoft	4	4	3	2	1

**What types of support for your organisation would you like more of?**

<b>Advice, information or practical support with:</b>	<b>Group 1</b>	<b>Group 2</b>	<b>Group 3</b>	<b>Group 4</b>	<b>Group 5</b>
Funding opportunities		2	1		
Marketing and communication	2				
How to influence local government		Joint 3rd	2		2
Organisational development	3		3		
Volunteer brokerage, management and opportunities	1				
Business support and development, including social enterprise		1		1	3
CRB Disclosures					
Project development				3	
Managing Change		Joint 3rd			1
Financial Management				2	



**Session 2:**

The delegates were given the following scenarios and asked to work in small groups to answer them.

1. If your organisation was considering merging or closely collaborating with another organisation, which areas of your organisation's activities or ways of working would you be willing to consider changing?

## Answers

- Sharing Training
- Sharing information
- Changes to or loosening of regulations - makes it easier for VCS to participate
- Trustees would have less power
- Support service sharing between organisations - contracts, HR , admin, finance etc
- Hub for organisations
- Putting in joint bids
- Having Board representation from other organisations
- Consider outsourcing some services

2. If your organisation was considering merging or a closely collaborating with another organisation, which areas of your organisation's activities or ways of working would you **not** be willing to consider changing?

- One stumbling block - regulation and legislation
- Smaller organisations could have concerns about being taken over
- Merging is a difficult area - a matter of trust, would need to see real benefits of working in this way
- Our core values and beliefs of the organisation - don't want to see that lost!
- Must still be open to the public
- Anything prevented by legislation

## Resource Sheet: Reasons for Thinking about Merger

### Reactive

- a last-resort effort to survive in response to external pressures
- a strategy for dealing with an environment of uncertainty and scarce resources
- a response to pressures arising from commissioning and contracting
- a response to the influence of funding bodies.

### Proactive

- meet users' needs more effectively
- have greater influence on the external environment
- expand the range of services provided.

**Research has identified the following seven major reasons why voluntary organisations consider merger:**

- the vulnerability of smallness
- financial pressures
- governance problems
- influencing the external environment
- meeting users' needs more effectively
- broadening the organisation's offer
- having a history of collaboration.

These are not mutually exclusive and can occur in combination.

**Source:** *Thinking about... merger*, jointly produced with Bates Wells & Braithwaite solicitors and the Institute for Voluntary Action Research (IVAR)  
<http://www.ivar.org.uk/publications/reports-and-publications/thinking-about-merger>

## Resource Sheet: Sources of Information about Collaboration and Merger

### Big Lottery

The Big Lottery has published various resources to help organisations to work together, including:

- Working in partnership: a sourcebook
- Working in partnership - a good practice guide

Research about where BIG's policies and practice might be sustained or improved in order to allow us to provide better support for collaboration which found:

- While 'collaboration' can cover many things, one of the simplest approaches is for organisations to learn from each other. This type of peer learning is popular. Funders like BIG could make better use of online technology and internal communication to promote it.
- 'Forced' collaborations often prioritise the form of partnership over the purpose. VCS organisations may often be more interested in promoting efficiency through sharing back office functions.
- To ensure more effective collaboration, BIG (and other funders) should ensure that they give themselves and organisations enough time to think first about what they want to achieve. Only then should they decide what form collaborative working should take
- Funders should be willing to support the cost of that process, especially where they require collaboration.
- There are opportunities to learn more from the collaborative experience of international aid organisations.

**Source:**

[http://www.biglotteryfund.org.uk/er\\_better\\_funding/er\\_collaboration.htm](http://www.biglotteryfund.org.uk/er_better_funding/er_collaboration.htm)

## **Charity Commission**

### **Choosing to Collaborate: Helping you succeed**

This is a 36 page document which examines collaborative working and the issues which organisations need to consider.

The top tip tips for successful collaborations are:

- Be clear that any collaboration is in the interests of your charity's beneficiaries
- Make sure you are satisfied that the collaboration furthers your charity's objects
- Ensure that your agreement clarifies objectives, processes, roles and responsibilities
- Pay attention to communications and make sure that all stakeholders understand how and why your charity should collaborate
- Make sure that your charity's independence is not compromised
- Contact the Charity Commission at an early stage if you need our advice or help.

For more information go to [http://www.charity-commission.gov.uk/charity\\_requirements\\_guidance/your\\_charitys\\_activities/working\\_with\\_others/colltoolkit.aspx](http://www.charity-commission.gov.uk/charity_requirements_guidance/your_charitys_activities/working_with_others/colltoolkit.aspx)

### **Making mergers work: Helping you succeed**

This is a 44 page document which examines organisational merger and the issues which organisations need to consider.

The top tip tips for successful mergers are:

- The merger should be in the best interests of the charities' beneficiaries
- The charities involved must be compatible in objects, culture and values
- Effective communication with all stakeholders from the outset is vital - processes and outcomes should be clear to all involved
- The charities' trustees should be united in believing that the merger is the best way forward
- Identify the key roles and responsibilities in the merger process

- Communicate and negotiate in a way that reflects the interests of all parties
- Contact the Charity Commission at an early stage if advice is needed.

For more information go to [http://www.charity-commission.gov.uk/Charity\\_requirements\\_guidance/Your\\_charitys\\_activities/Working\\_with\\_others/mergetoolkit.aspx](http://www.charity-commission.gov.uk/Charity_requirements_guidance/Your_charitys_activities/Working_with_others/mergetoolkit.aspx)

### **CC34 - Collaborative Working and Mergers**

This is guidance from the Charity Commission for all charities who may be considering working in partnership or merging with other organisations.

The Charity Commission state that purpose of this guidance is:

“The ultimate aim of any charity must be to provide the best possible service to those who benefit from its work. One way of achieving this is by working with others. Exploring opportunities for collaborative working and mergers is part and parcel of trusteeship in today’s climate.

Collaborative working can start from very simple informal ideas, such as borrowing or lending resources. At the other end of the spectrum are more integrated arrangements that, depending on the size and complexity of the charities involved, may require professional advice. These arrangements can relate to any aspect of a charity’s activities including administration, fundraising, campaigning and service delivery and can result in cost savings and better services for those the charity seeks to help. In some cases, charities may merge, that is come together to form one organisation. This will involve formal procedures and usually require professional advice.

All charities should consider seriously and imaginatively whether there are ways in which they could do more for their beneficiaries by working together. While every charity has its own distinctive contribution to make to society, an effective charity explores whether collaboration or partnership with other organisations or merger with other charities could improve efficiency, the use of funds and the delivery of services to current and future beneficiaries. We encourage trustees to look at this regularly. When the conditions are right and trustees can see clear advantages, we are happy to provide support and expertise to help charities with all aspects of collaborative working or merger process.”

For more information go to <http://www.charity-commission.gov.uk/Publications/cc34.aspx>

## Evaluation feedback

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Delegates were asked to report on what action they will take to put what they have learnt today into practice:

- A lot!
- Ensure that VCS organisations are included in ‘local’ strategic developments
- Be more involved in the Suffolk Congress
- Promote VCS collaboration
- Review our approach to change
- Look at info on NCVO website and email Donald too!
- Keep better data as evidence for service impact
- More engagement with elected members
- More detailed information to take back to Trustees
- Better understanding of opportunities and knowledge with the NHS
- Will reflect on feedback from interactive voting

## General comments about the day

- Opportunity to voice views in workshops welcome!
- Really valuable input from speakers
- Good idea to deliver the NHS workshop as a discussion / question session
- The questions on the interactive section were very appropriate and gave some interesting results
- Workshops needed more time and feedback would have been appreciated
- Would have liked more information about how to work with GP commissioners



## Next Steps

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The essence of this report is to capture the spirit of the Fit for Change conference. From this, SAVO will:

- Take forward key issues and concerns raised by both Sectors in our work around connecting, influencing and developing
- Use the data and information collected in developing our strategies and long-term planning
- Feed the workshop comments into the Transforming Local Infrastructure Bid
- Ensure that our services are robust in such areas as developing trustees, supporting organisations in the recruiting and retaining of volunteers and in key areas, such as collaboration and merger
- Continue to work with Public Sector partners to promote and highlight the work of the VCS
- Give a voice to general concerns raised through the Suffolk Congress
- Lobby Councillors and local MP's to raise the profile of the VCS
- Work with NHS Suffolk to ensure the VCS is integral to the new structures
- Ensure that Clinical Commissioning Groups are aware of the potential role the VCS can play in delivering services
- Use the feedback from the conference in planning new events
- Feedback to the wider Sector current issues and activities that we are involved in.



## Organisations represented

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<b>Name</b>	<b>Organisation</b>
Liz Brooking	Bawdsey Radar Trust
Mary Wain	Bawdsey Radar Trust
Hugh Morgan	Break
Jackie Skillicorn	Bridge Project
Karen Hare	Cancer Campaign in Suffolk
Michael Williams	Fightback Trust
Robert Rollings	Fightback Trust
Murray Staines	Cats
Tracey Gardner	Halesworth Volunteer Centre
Brian Tobin	Iceni Project
Sue Clements	ICVS
Ronagh Witthames	ICVS/Ipswich Borough Council
Alison Coleman	SCC
Spetim Alimeta	Basis Project
Dr Mirjam Southwell	ISCRE
Michelle Jones	Perspective Pregnancy Advice
Adrienne Wakeling	Royal British Legion
Jeannie Buckingham	Suffolk County Council
Chris Bailley	SCC
Katy Parr	Orwell Mencap Genesis
Kathleen Ben Rabha	St Edmundsbury & Ipswich Diocese
John O'Sullivan	St Johns Housing
Sergeant Andrew Pursehouse	Suffolk Constabulary
Helen Scott Davies	Suffolk Education Business Partnership
Fiona Knott	Suffolk Family Carers
Sarah Adams	Suffolk New College
Hazel Pidsley	Volunteer Centre Bury St Edmunds

Mohammad Alam	Bangladeshi Support Group
Lois Sed Don	IBC
Ian Finch	Suffolk Deaf Association / SAVO Trustee
Carol Deslandes	SAVO Trustee
Paul Banjo	Mid Suffolk District Council / SAVO Chair of Trustees
Richard Stanley	NHS Suffolk / SAVO Trustee
Trevor Lockwood	SAVO Trustee
Trevor Connick	SAVO Trustee
Chris Kerr	SAVO Trustee
Karen Last	SAVO Trustee
Stuart Read	SAVO Trustee
Cathy Whitmore	SAVO Trustee

#### **SAVO Staff**

Jonathan Moore	Chief Executive
Louise Bradshaw	Administrator
Tom Bright	Corporate Services Manager
Shelagh Everett	Finance Assistant
Laura Hack	Business Manager
Robin Hodgkinson	Training Manager
Alison Jordan	Change Makers Campaign Co-ordinator
Mike McCarthy	Suffolk 2012 Volunteering Legacy Officer
Simon Waldron	Information Officer
Chantelle Welham	Health Champion Co-ordinator

#### **Speakers**

Colin Spence	Suffolk County Council
Donald Ritchie	NCVO
Paul Rowley	SAVO Volunteer
Maddie Baker-Woods	NHS Suffolk