How do we “future proof” the Voluntary, Community and Social Enterprise (VCSE) sector for the challenges ahead?

27 November
Lough Neagh Discovery Centre
Introduction and Welcome

Nigel McKinney
Building Change Trust
Introduction and Welcome

Nora Smith
Collaboration NI
Value Driven Partnerships in the VCSE Sector

Chairperson
Ursula O’Hare
Law Centre NI
Value Driven Partnerships in the VCSE Sector

Kerry Anthony
Chief Executive
Depaul Ireland
How are we working with others…
KEY PLATFORM – ABOUT DEPAUL

We are...
- A charity supporting people who are homeless or at risk of homelessness
- Part of Depaul International, a group of charities working to support people who are homeless and marginalised around the world - helping over 10,000 people every year
- We are a values led organisation
- Shares close links with the Society of St Vincent de Paul and other members of the Vincentain family and are a separate organisation/charity our founding partners were the SVP, Daughters of Charity and Vincentian Fathers
- We are a cross border organisation Providing services in the Republic of Ireland and Northern Ireland
- Established in ROI in 2002 and NI in 2005 – over a decade of helping those that need us most in the community some of our services have been the first of their kind
- We have...
  - A cross border presence in NI and ROI
  - A 10 year history in Ireland
- We help...
  - Provide over 350 bed spaces nightly
  - Those most in need in the community who are often multiply excluded
  - 2014 people used Depaul Ireland services in 2013
  - Employs over 360 people (full-time and part-time)
  - Provides opportunities for more than 300 volunteers – almost 27,000 volunteer hours dedicated in 2014 alone
  - All services supported by a quality assessment framework
  - All staff and volunteers working with service users are trained to the highest standards
  - Robust and transparent corporate governance structure and financial systems in place to ensure that all funding is used properly.
KEY PLATFORMS

PROVIDING ACCOMMODATION AND SUPPORT TO PEOPLE WHO ARE HOMELESS OR AT RISK OF HOMELESSNESS

Homelessness Prevention

We...
Prevent homelessness through community-based support services, a day centre, outreach, floating support and befriending services
• Help people most in need in the community
• Support people living in the community who have moved out of homelessness
• Help people and families in the community to maintain their homes
• Offer community involvement and support in our services through dedicated volunteers
• Help those with acute mental health issues in the community

Homelessness & Vulnerable Families

We...
• Help vulnerable families, women and children who are homeless
• Reunite families affected by homelessness
• Support families to strengthen their relationships
• Offer security, stability and strong foundations for families
• Strengthen parenting and childhood experiences
• Offer support to vulnerable families to develop skills and move out of homelessness

Homelessness & Addiction

We...
• Provide low threshold accommodation and support to people who are homeless and living with addiction
• Ensure that everybody has access to our services so that they can address their addiction issues
• Are pioneers in the creation of a harm reduction model to help people with acute addictions reach their true potential
• Support people to stabilise their lifestyles

Homelessness & Criminal Justice

We...
• Work with people leaving prison who are vulnerable to homelessness
• Provide specialist accommodation for women who have had contact with the criminal justice system with the tools to reintegrate into society
• We help people to address the causes of crime and reoffending behaviour
• Help to rebuild and reunite family relationships following imprisonment
• We support people with acute mental health issues to manage their home and community supports
DEPAUL MISSION, VISION AND VALUES

OUR MISSION
We aim to end homelessness and change the lives of those affected by it

OUR VISION
Our vision is of a society in which everyone has a place to call home and a stake in their community

OUR VALUES
• We celebrate the potential of people
• We put our words into action
• We aim to take a wider role in civil society
• We believe in rights and responsibilities
EXAMPLES OF JOINT WORKING

• Consortium bid

• JMA

• Mentoring

• Amalgamations
TWO EXAMPLES

• Consortium Bid in Dublin

• Amalgamation (transfer for service in Dublin)
CONSORTIUM BID

• Know you audience
• Agree principles
• MOU
• Communication
• Independent advice
• Involvement of partners at key stages
AMMALGAMTION

• Distinct phases

- Initial scoping, matching and process agreement
- The amalgamation Process
- Post merge integration
ISSUES WE ENCOUNTERED

• One size DOES NOT fit all
• Slowness of process
• Personalities
• Managing expectations of others
• Accepting the need for change
• Communication, communication, communication
COMPONENTS CONTRIBUTING TO SUCCESS

- Personal relationships
- Good communication
- Clarity in layout and duration of process
- Trust and regard for leadership
- Previous experience
- Strong staff buy in
LEARNING

• Expect the unexpected
• Leadership is required – over view and vision
• You are making lasting decisions
• Ethical approach – consideration of others
• Realism needed and frank conversations
• Better outcomes for service users?
DEPAUL RECOMMENDATIONS

• Standard checklist
• Values fit – most important
• Consider 3rd party involvement
• Consider capacity issues fully
• Agree vision
• Personalities are important and succession planning is also a factor to consider
• Conversation style at the outset
THANK YOU

KERRY ANTHONY
CHIEF EXECUTIVE OFFICER
DEPAUL
Value Driven Partnerships in the VCSE Sector

Nicky Conway
Head of Development
Belfast Central Mission
Partner organisations

Alzheimer’s Society
Leading the fight against dementia

TBcm
Supporting those who need it most

Extra Care
all the care you need – at home

Northern Ireland Hospice
Overview

• Background to the collaboration
• Progress to date
• Outline the benefits of the model and why it’s needed
• Next steps
Background

• Study visit to USA
• All working to support older people with dementia in the community
• Potential for continuum of services
• Stronger together
Why is this needed?

• There are 835,000 people living with dementia in the UK in 2014.

• Dementia costs the UK economy over £26 billion per year – higher than cancer, heart disease or stroke.

• 19,000 people in NI living with dementia projected to rise to 61,000 by 2015.
How can 4caring help?

By working together:

• Better outcomes for people living with dementia and their carers
• Give commissioners more ‘bang for their buck’
Progress to date

1. Facilitation
2. Finalise the partnership
3. Legal structure
4. Funding bid to BCT for a Project Co-ordinator
5. Branding
6. Forecast SROI
Objective

By working in partnership, to support older people with dementia and their carers to live well and with dignity at home
4caring Dementia Services Model of Coordinated Community Support

People with dementia, their families and carers

4caring Coordinator - a single healthcare practitioner to ensure timely access to care & support

Health & wellbeing - proactive, holistic care & support to help manage symptoms, enhance coping & prevent crises

Social environment - support to engage in meaningful community & social activity

Physical environment - housing support & adaptations to maintain/enhance a person's home

Support for carers - ongoing support to live well & maintain caring role

Information & advice - accessible, high quality information on dementia & local dementia support
Component 1: 4caring Coordinator

- Single point of contact for families
- Linking services together
- Responding to changing needs

4caring Coordinator - a single healthcare practitioner to ensure timely access to care & support

People with dementia, their families and carers
Component 2: Social environment

- Support to maintain or regain social activities & networks
- Reduce social isolation
- Contribute to dementia-friendly communities

People with dementia, their families and carers

Social environment - support to engage in meaningful community & social activity
Component 3: Physical environment

- Housing related support
- Small adaptations can help to maintain independence & support carer in their role
- Support maintaining home or garden, advice about tenancies & benefits, support managing finances
Component 4: Support for carers

- Holistic support to enhance coping & prevent crises
- Coordinated approach to ensure right support at right time
- Reduce social isolation
- Bereavement care for continuity of support

People with dementia, their families and carers

Support for carers
- Ongoing support to live well & maintain caring role
Component 5: Information and advice

- Co-ordinator will ensure awareness of range of supports available
- Knowledge and information to empower families and individuals and aid decision making
- Advocacy to empower & support a person to express their views & choices
Component 6: Health and wellbeing

- Holistic menu of community-based care & support services
- Proactive approach to supporting general health & wellbeing
- Responsive support to help manage symptoms, enhance coping & prevent crises
- Support to ensure minimal lengths of hospital stays
Overview of services proposed through 4caring Dementia Services

- Home care
- Carer support
- Specialist nursing at home
- Housing support
- Advocacy
- Befriending
- Benefits advice
- Information
- Home adaptations
- Family carer training
- Bereavement support
- Overnight support
- Social activities

4caring
Dementia Services
Keys to success

- Co-ordination
- Communication
- Consistency
Benefits for people with dementia and their carers

- Improvement in physical and mental health
- Increase feelings of respect and dignity
- Increase in confidence and self esteem
- Improved social inclusion
- Increased levels of independence & remaining at home
- Better off financially
- Overall improved quality of life
- Reduced hospital admissions - Reduction in falls and accidents at home due to adaptations and nurses identifying and treating illness earlier
Benefits for Commissioners

• Access to a holistic and connected range of services
• Supports government strategies
• Value for money (SROI £5:£1)
• Preventative value
Next steps

- Engage with stakeholders and seek funding for pilot
- Recruit 4caring Co-ordinator
- Role out pilot
- Evaluation
- Build scale and develop collaboration on the back of successful pilot
Value Driven Partnerships in the VCSE Sector

Vivian McConvey, Chief Executive, VOYPIC
Koulla Yiasouma, Director, Include Youth
Together we’re stronger

Guidance on the establishment of a Cost Sharing Group in the Voluntary & Community Sector in NI

Koulla Yiasouma, Include Youth
Vivian McConvey, VOYPIC
• 2007 Positive Steps, Government Response to Investing Together
• 2009 recognised the need for change
• Feasibility Study
• Building Change Trust
  – Development Director
• Building Change Trust
  – Shared accommodation
  – Technical assistance – Cost Sharing Group
• Reshape partnership, April 2013 - Vlicable
• 1st Dec 2014 – Vlicable CEO
Together we’re stronger - Purpose

Assist VCS to formally collaborate to establish a Cost Sharing Group (CSG)

1. Reduce the overall cost of service delivery via asset sharing
2. Freeing up time for personnel
3. Increases operational efficiency through better management information
Features of a cost sharing group

• A separately constituted, governed and managed organisation
• Requires two or more members who have a common need, strategic fit and can work together effectively
• Make efficiencies in
  – Corporate services
  – Marketing
  – Transportation
  – Research & development
• Financial Management
• Business Development
• Human Resources
• Corporate Services
  • IT
  • Health & Safety
  • Administrative systems
  • Governance requirements
Constituting a legal entity

- Company limited by guarantee
- Industrial and Provident Society – cooperative
- Charitable Incorporated Organisation
- Limited Liability Partnership
- Trust

**Company Limited by Shares**

- JOINT VENTURE SHAREHOLDERS' AGREEMENT
- COMPANIES ACT 2006 PRIVATE COMPANY LIMITED BY SHARES ARTICLES OF ASSOCIATION OF VI-ABLE CORPORATE SERVICES LIMITED
<table>
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<td>Companies House CIC Regulator(i) Charity Regulator(ii)</td>
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(i) If registered as a CIC (ii) If registered as a charity (iii) Not currently in NI but provision made in the Charities Act (Northern Ireland) 2008 (iv) Public Benefit (v) Refers to a wider membership participating in the *(vi)* Tax advantages linked solely to being a social enterprise and not more widely applicable to different types of business.
Think about ........

- **Ensuring value for money**
  - Not just about cost saving – making best use of resources

- **Employee issues**
  - Structure, transfer, recruiting staff

- **Procurement and tendering**
  - Implications of a CSG for member organisations. Members not required to complete a procurement exercise for the services supplied by the CSG

- **Business processing**
  - IT

- **Finance, accounting and VAT arrangements**
  - Exempt from VAT
Summary & way forward

• Many benefits
  – Opportunity to provide range of high quality professional services not possible to source individually

• CSG is akin to a social enterprise
  – Innovative, clear, strong leadership and relationships

• Beyond the legalities and governance
  – It requires time, energy and creativity to establish
Supporting VCSE collaborations

Minister for Social Development

Mervyn Storey
Question and Answers

Chairperson
Ursula O’Hare
Law Centre NI
Lessons and Learning from collaborative working models in England and Wales, why size matters in the competitive tendering process

Eoin Heffernan
Chief Operating Officer
3SC
Lessons & Learning

“Future Proofing” the VCSE for the challenges ahead

#3SCfutureproofing
Lessons & Learning
“Future Proofing” the VCSE for the challenges ahead

What is 3SC?

Context

Five Lessons

Learning
Case study - Access to Work Wales
Case study - Transforming Rehabilitation

Future Proofing
#3SCfutureproofing
Collaborate // Innovate // Speculate
Third Sector Consortia LLP (3SC)

3SC bids for and delivers public sector contacts through VCSE consortia

- Bid writing
- Financial modelling
- Contract negotiation
- Performance management
Third Sector Consortia LLP (3SC)

- Started June 2009
- Managing agent “only”
- Honest broker
- Social enterprise
- Profit into capacity building VCSE sector
- 3000 members
Context // Increasingly Complex for VCSE
The amount spent on outsourcing services in the UK has doubled to £88bn since the coalition government came to power in 2010

Financial Times July 2014
Drivers

- Reduced public money – more for less
- Need for efficiencies – reduced capacity in public sector
- Existing approaches not working
- ‘Open Public Services’ – open markets, competition

Context // Government Outsourcing Drivers
Trends

• Payment by Results (PbR) increasing

• Coalition Government pledge 25% of government spend to SMEs by 2015

• Outsourcing scandals (Atos, G4S and Serco) has increased value of practical third sector partnerships and social value creation

Context // Trends
Five Lessons

1. Over-engineering contract delivery
2. ‘Bid candy’ & ‘Parking and creaming’
3. Unread contracts
4. Unclear unit cost
5. The Exclusivity mistake

Lessons // Five Lessons
Lesson 1 // Over-engineering contract delivery
Example - Information Security Management

- Over-engineering information security always constricts contract delivery
- Risk must be appropriately managed not destroyed
- Seek only to achieve rather than over-achieve compliance requirements
- Avoid being coerced by IT suppliers of the need to purchase the latest tech

Lesson 1 // Over-engineering contract delivery
‘Bid Candy’ & ‘Parking and Creaming’

• Lead bidders are always incentivised to embellish bids with mixed economy of provision

• Promises are not contracts

• Contracts may incentivise ‘Parking and Creaming’ behaviours so that more difficult customers are given less/no service

• Assume ‘indicative volumes’ at 60-70%

• Resource prudently based on evidenced referral trends

Lesson 2 // Bid Candy & Parking and Creaming
Read (and understand) your contract

Lesson 3 // Unread Contracts
Read (and understand) your contract

• There are no stupid questions of clarification

• ‘Indicative’ means *possible* rather than *probable*

• Agree only what is achievable

• Understand ‘who does what’ and ‘who pays for what’ for things like delivery systems, administration and marketing

Lesson 3 // Unread Contracts
Understand your unit cost precisely

Lesson 4 // Unclear unit cost
Understand your unit cost precisely

• Fully account the cost of each delivered intervention
• Establish a minimum ‘basement’ price per unit and stick to it
• Honestly assess the worst case position and scenario plan
• Expect hidden and unexpected costs and include healthy contingency

Lesson 4 // Unclear unit cost
Lesson 5 // The Exclusivity Mistake
Avoid Exclusivity

• Make deals with all bidders

• Exclusivity reduces opportunity

• Should a bidder require exclusivity investigate whether the procurement re

• Learn the art of coopetition

Lesson 5 // The Exclusivity Mistake
Case Study
Access to Work

The best government programme you’ve never heard of …
Innovation in Outsourcing award nomination 2012

Best Service award 2013-2014
Assessments

Security Concerns
Storage
Administration
Reporting
Bureaucracy
Best quality service
Best achievement against all KPI’s
Best price per assessment for our consortium in the market

We changed the market
MARKET LEADER THROUGH EFFECTIVE CONSORTIUM WORKING
3SC launches Access to Work Programme in Wales with bespoke online portal

Public service delivery social enterprise 3SC has developed a bespoke web portal to enable its partner organisations to carry out needs-assessment reports for the Department for Work and Pensions.

3SC was formed to bid for large public sector contracts on behalf of smaller civil society organisations and the Access to Work programme in Wales is its prime contract. There are now eight charities with specialist knowledge which carry out needs-assessment reports for the DWP and submit them through the consortium’s new online portal.

The portal is cloud-based and is designed to provide charities with a robust customer service platform and comprehensive IT suite so that they focus on service delivery. It also connects directly to the DWP and should speed up the overall process.

Operations director at 3SC, Eoin Heffernan, said: “3SC has devised the technology for a complete system that enables support for high quality delivery performance in this programme and takes the sector forward in a market where their specialist support skills will make a marked impact on successful outcomes.”
Takeaways

- White-boarded with everyone in the market
- Leveraged the strength of the third sector
- Planned long term for customer focussed delivery
Purple Futures is the name of our partnership with our national partners. Interserve, 3SC, Addaction, P3 and Shelter have formed a legal partnership which will own the Community Rehabilitation Companies.
Key Facts

• Purple Futures won 5 of 21 CPA areas and nearly 25% of delivery

• £450,000,000 / year contracts

• Ten year contracts

• All but one CPA was won by a VCSE partnership
VCSE Consortia

- 20% of activity and finances delivered through VCSE
- 75% of all of the 300 subcontractors involved in TR are VCSE
- Interserve’s Charity Charter defines principles which include longer term contracts as standard, third sector incubation and no PbR risk as required
3SC offer

- Parallel interventions in integrated service model
- Outsourced contract management and due diligence of 80 VCSE organisations
- VCSE incubation to drive innovation
- On-going market entry
- Shared practice and learning of ‘what works’
Collaborate
Innovate
Speculate

Future Proofing

#3SCfutureproofing
#3SCfutureproofing

Collaborate // Innovate // Speculate
#3SCfutureproofing

Collaborate // Innovate // Speculate

Forget the box, think outside the building
Collaboration is NOT consensus

- Requires leadership
- Honest broker role
- Blur the boundaries
- Diversify perspectives
- *Competition makes us faster, collaboration makes us better*

Collaborate // Innovate // Speculate
#3SCfutureproofing

Collaborate // **Innovate** // Speculate
Innovation?

Collaborate // Innovate // Speculate
Pressure on Returns
Lean Philosophies
Back to the tried and tested

Business as usual is not enough
#3SCfutureproofing

Collaborate // Innovate // Speculate
Collaborate // Innovate // Speculate

#3SCfutureproofing
#3SCfutureproofing

Collaborate // Innovate // Speculate
#3SCfutureproofing

Keep on top of the market

Ask “What next?”

What do commissioners want?

Collaborate // Innovate // Speculate
Lessons & Learning

“Future Proofing” the VCSE for the challenges ahead

What is 3SC?

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Future Proofing
#3SCfutureproofing
Collaborate // Innovate // Speculate
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LinkedIn  uk.linkedin.com/pub/eoin-heffernan/22/913/149/
Twitter  @eoin_heffernan
Unpicking the Health and Social Care Commissioning Framework

Sheelin McKeagney
Chairperson
Southern Local Commissioning Group (LCG)
To Merge or Not to Merge – Practical Advice and Support from Collaboration NI on Voluntary and Sector Mergers

Andrew Talbot
Legal Advisor
Collaboration NI
CollaborationNI Legal support
The Collaboration spectrum
The drivers for change
The Merger process
Alternatives to merger
Critical success factors
Common deal-breakers
Dos and Don’ts
CollaborationNI: Partnership of NICVA, CO3 and Stellar Leadership
Commissioned by the Building Change Trust
Provides practical support to voluntary, community and social enterprise organisations across the whole spectrum of collaborative working
Worked with over 900 organisations since 2011
The Collaboration Spectrum:

Networks and alliances
Consortium building
Full mergers
Some Mergers Supported by CollaborationNI:

Fermanagh Community Transport
CDM Community Transport
Abbeyfield Housing Association and Wesley Housing Association
Top of the Hill & Hillcrest House
Early Years and Orana Family Centre
Drivers for change:

‘too many charities’ ‘too much duplication’
Challenging funding environment
Reorganisation of local government - RPA
What is a merger?

What is a typical merger process?

Is merger the only option?
Critical success factors

“If you want to build a ship, don’t drum up the men to gather the wood, divide the work and give orders. Instead, teach them to yearn for the vast and endless sea”

Antoine De Saint Exupery

Common deal-breakers
Seven Dos and Don’ts of Collaborations and Mergers:
Don’t overthink it – collaboration is sometimes a leap of faith!
Do make certain there is buy-in from all groups
Do make it a collaboration of the willing – not of the reluctant
Do focus on building long-term trust and relationships
Do agree a process
Do put in place a steering group to give leadership to the collaboration
Don’t be afraid to walk away!
Andrew Talbot, Legal Adviser
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Andrea Egan, Legal Support Officer
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Leeann Kelly, Programme Co-ordinator
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www.collaborationni.org
@Collab_NI
Summary and Close

Nora Smith
Collaboration NI
SAVE THE DATE
Collaboration and Community Leadership Locally
16 January – 11:00 – 13:00
The Volunteer Centre

This session will focus on the realities of community collaboration, looking at the opportunities and challenges of joint working at community level in the current context.
SAVE THE DATE
Community Led Collaboration
10 February 10:30 – 12:45
The Volunteer Centre

Some of the questions to be considered include:

- What are the particular characteristics of collaboration at community level that require specialised support?
- What are the necessary conditions for establishing an authentic collaborative culture amongst community leaders and organisations?
- What makes an effective collaborative community leader?
- What are some of the chief dangers and obstacles to successful collaboration?