

**Review Report
Of
Telford and Wrekin
CVS**

September
2006

Tina Healy
Tina Healy & Associates
Training & Consultancy

Contents

Page 3	Introduction
Page 5	Services
Page 9	Membership
Page 9	Consultation/Representation
Page 11	Accommodation
Page 12	Staffing
Page 12	Funding
Page 13	Governance
Page 15	Reserves
Page 16	Options/Recommendations

Introduction

Telford and Wrekin Council for Voluntary Services (CVS) is a registered charity, which has been in existence since 1974. It became a company limited by guarantee in 1988. Its services are generally co-terminus with the Telford and Wrekin unitary authority, although some of its activities also include the Shropshire County area.

The purpose of this review has been to look at the work of the CVS, in particular Governance; Accommodation; Membership; Fundraising; Consultation and Services and also to look at the needs of the voluntary sector in the Telford and Wrekin area. It does not explore in detail issues related to CVS Projects, which are all administered through negotiated service level agreements with organisations requesting services.

The Development team undertakes the core work of the CVS

Development Team

- Supporting voluntary sector activity
- Improving co-operation, supporting partnership activity
- Ensuring that the voice of the voluntary sector is articulated and heard
- Expressing social need
- Sharing information
- Helping to direct resources to areas of greatest need
- Promoting direct services
- Encouraging self-help, developing social capital, capacity building

Telford and Wrekin CVS also provides a range of services which includes:

Volunteer Centre

The Volunteer Centre promotes volunteering and supports the local voluntary and community sector. It is one of a national network of development agencies affiliated to Volunteering England, whose six core functions are:

- Brokerage
- Marketing
- Good Practice Development
- Developing Volunteering Opportunities
- Policy Responses and Campaigning
- Strategic Development of Volunteering

Community Mobility Transport

Community Mobility Transport provides a variety of transport services throughout Telford and Wrekin. This includes:

- Volunteer Social Car Scheme
- Wrekin Community cars
- Tail lift buses for the disabled
- Dial-a-Ride bus

Parent Partnership

The **Parents Partnership** provides services for parents/carers whose children have Special Educational Needs, in order to empower them to play an active and informed role in their child's education. The Parent Partnership provides:

- Accurate and independent information
- Individual support
- Support groups
- Support in working in partnership with Schools, Education Departments and other agencies
- Explanation about educational procedures

Carers Contact Centre

The **Carers Contact Centre** provides services for anyone providing a relative or friend with practical, personal or emotional support. This includes:

- Providing up to date information
- Supporting individuals by listening and giving support
- Linking carers to other organisations that can provide specialist help
- Creating opportunities for carers to have a voice in the planning and development of services

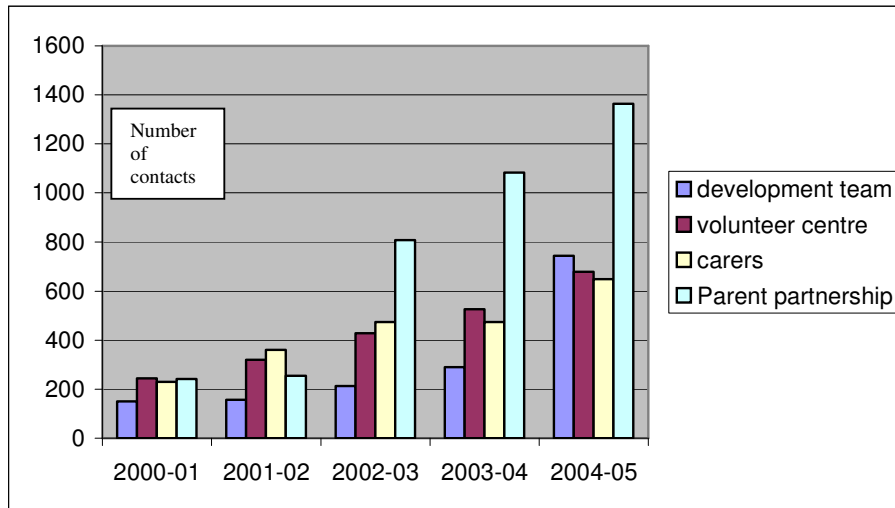
Young Carers Service

- Support and networking opportunities,
- Social contact and activities for children and young people helping to look after a parent or a family member/ relative.

This contract came into existence in June 2006, following a successful tender by CVS. Work is underway to help the project establish its own identity and appointments have now been made to the three posts supporting the project. The project is managed by a Project Manager and employs two other staff members. Currently the team is based within the CVS Carers Contact Centre at Leegomery and one of the key tasks for the manager of the project is to identify additional funding for the service. The project is supported by a 3 year Service Level Agreement between CVS and Telford and Wrekin Council. Of late a significant increase in numbers of identified carers has taken place suggesting this is a service we can further develop over time.

Services

Telford and Wrekin CVS has seen an impressive growth in demand for its services of all descriptions over the past five years.



Figures taken from the annual reports

This demand looks set to continue with a recent survey of the voluntary and Community groups in Telford and Wrekin showing that 45% of the respondents cited improved services as their five year goal and that 28% would need more volunteers to achieve this and 45% would need funding. From the survey five main area of specific support could be identified. These being volunteers; funding; ICT; training and specialist advice services.

This reflects the national trend and is highlighted in the National Change-Up Strategy¹, which concentrates on the six key areas of Performance Improvement; Workforce Development; ICT; Volunteering; Finance and Government. Six national hubs of expertise have been set up to support this.

Volunteer Centre

The **Volunteer Centre** has seen a 36% growth in demand over the past five years growing from 244 contacts in 2000 to 679 in 2005. These figures only cover the number of volunteers and do not include

¹ See glossary

organisations accessing services. Volunteer Brokerage only represents a proportion of the work covered by the Volunteer Centre. Other areas include development work with groups on issues of best practice when using volunteers, training and implementing the Investing in Volunteering quality standard. In the future an additional strain will be put on the Volunteer Centre as the demand for volunteers outstrips supply. There is a growing trend due to things such as the pension crisis, where people will have to work longer and the pool of potential volunteers will get less, making it more difficult to recruit new volunteers. The work of the Volunteer Centre is resource intensive with around 50% of volunteers having additional support needs. Any further increase in demand could over stretch existing capacity: -

Therefore extra resources may be need in this area to ensure TWCVS has the capacity to deliver in this key area.

Funding information and support

Funding has always and will always be a high priority for groups therefore information and support on both identifying and applying for funding – 83% of groups surveyed wanted help applying for funding – will continue to be an area of high demand for the CVS. As was seen with the Single Regeneration Budget² 6 project funding support can be very work intensive as groups that have been previously self-financing become aware of the external funding that is available but have no experience of applying for funding. This then requires extensive amounts of ‘hand holding’ during the application process. Whilst the majority of the development team provide generic funding advice this is only part of their remit and there is no specific grants officer: -

Therefore again extra resources maybe needed in this area to meet demand.

Information Communication Technology

ICT brings opportunities and challenges for everybody and none more than the voluntary and community sector, who in many cases have lagged behind other sectors in maximising the potential ICT offers.

The sector is beginning to now catch up and TWCVS may find an increase in the number of groups requesting support with ICT in the future. 70% of the groups surveyed supported the idea of networking via ICT networks and bulletin boards. Only 17% said that they would like to actually meet bi-monthly. TWCVS would be ideally placed to offer a mix of physical and virtual networking opportunities.

² see glossary

Additionally 34% required help with ICT. Figures so far from the current survey suggest that 40% would like support with computers and software; 28% would like training and 10% would like in-house or on-line support. This could constitute a benefit of membership.

Training

TWCVS currently runs various **training** sessions across all areas of their work. All staff interviewed identified the need to provide more training. Additionally 47% of the groups surveyed identified training as a need for both staff and volunteers. This could be a growth area for TWCVS in the future. Additional funding may be required to resource this however some self-financing might be considered. The Change-Up strategy encourages infrastructure³ organisations to look at the sale of services as part of their funding strategy. Given the nature of the role of the CVS this can cause difficulties however training is an area that could realistically provide some income or at least to some extent pay for its self. Many voluntary sector organisations do charge an amount for training ranging from a minimum amount to cover administration costs through an element to cover the cost of the trainer therefore TWCVS should explore the possibility of charging to cover the cost. . The challenge is to ensure that the training is of a high quality and that the training ‘experience’ is considered worth the time and money. If training is to be a growth area then it maybe worth considering developing a training arm to make it a key delivery area rather than an element of all other service areas. This would ensure full focus on development and delivery ensuring the quality of training. If a training arm were to be developed then it would be advantageous to consider developing/delivering an accredited programme. The Open College Network could be an one option to do this , as there is going to be an increasing demand for accredited training in the future. To maximise resources all staff could be trained to teach adults (C&G 7407) to enable them to deliver some of the training , which would build the capacity of the CVS.

Income generation

- Other potential areas that could provide income generation are: -
- Rental from accommodation/desk space. 28% of the groups surveyed identified that this was a service they would be interested in the future. This could be developed into a package,

³ see glossary

possibly for start-up, which could include desk space; computer etc plus services such as payroll, reception etc. Obviously this would be dependant on available space.

- Equipment hire, although many CVS's do offer this free as a benefit of membership
- Consultancy, a charge could be made to undertake consultation for statutory agencies.
- Sale of goods i.e. stationary, specialist books, computer software (membership of NAVCA enables CVS's to purchase cheap software)

Specialist advice services

Finally, the last area identified is the provision of **Specialist advice services**. This can be a difficult area to deliver on mainly as it is difficult to predict demand, although in the survey 28% said they would like help with financial matters; 19% with employment and 34% with legal matters, this does not necessarily represent high usage, and some options can be costly.

- TWCVS could hold a contract on the sectors behalf with specialist organisations to provide information and support for groups. This could prove costly especially if under used.
- Alternatively TWCVS could try to negotiate voluntary agreements with local specialists to provide information and support but this would be a limit service and over-demand could make this unworkable.
- Another option could be to signpost to other organisations that provide these services, i.e. ACAS for employment issues
- Finally TWCV could work together with other regional CVS's to either share expertise or jointly buy in services from specialist organisations, which would help to spread the cost.

Membership

TWCVS currently charges a single membership fee of £6.00 regardless of the size of the organisation. For this groups receive a number of benefits including bi-monthly newsletter, information and the right to vote at the AGM. This brings in an annual unrestricted income of £1,356.

This charge seems very low and may not cover the costs of membership benefits. Many infrastructure organisations have moved to a scaled

membership fee normally based on income. For example a local infrastructure organisation charges on income. Under £10,000 = £5.00, under £100,000 = £10.00 and over £100,000 = £25.00. This brought in an annual unrestricted income of £2,353 from a membership half the size of TWCVS. This was introduced 3 years ago without any objection from the membership.

Other organisations have variations to scales and benefits. Some organisations do market core services as part of the membership benefits. If you intend to do this then - caution would need to be applied when providing support for groups that are not affiliated and actively encouraged to affiliate in the future. This would serve to both increase revenue for the CVS and bring greater numbers of voluntary and community groups under the umbrella of the CVS.

Consultation/Representation

Increasingly with so much focus on infrastructure organisations from National Government down CVS's are going to be seen as the 'gateway' to voluntary and community organisations. At the same time with a greater emphasis on voluntary and community groups delivering services they will increasingly look to the CVS to provide an advocacy/arbitrator role.

Therefore it is vital for TWCVS to have a clear idea of what it's role is and how and what it can deliver.

The compact sets out a framework for consultation and therefore it could be negotiated that community consultation is handled through the CVS at a fee. It may be necessary to 'buy-in' someone to undertake this if the CVS does not have the resources available, with the CVS taking a management role for which it could charge.

In terms of the advocacy/arbitration role it may be useful to have a policy that clearly states what TWCVS are and are not able to offer and to use this as the basis for any intervention. There is also a Compact advocacy programme⁴ run by NCVO that could help if there is a breach with the local compact.

⁴ see glossary

Accommodation

Currently the majority of TWCVS's services are delivered from Meeting Point House in the town centre of Telford, with the exception of the Carers Contact centre and Young carers, which operates from Leegomery Community centre.

The Meeting Point House accommodation while generally considered to be in a very good location, visible and good to be with other voluntary and community groups it does raise issues such as lack of space; parking problems; lack of privacy for some staff when dealing with confidential information and no room for further growth. Additionally to this there is the town centre redevelopment to be considered.

The Leegomary site is considered to be too small and not in an ideal location. The preference would be somewhere more central or in Wellington, as a well-established and accessible market town.

Given the accommodation needs of the organisation it may be advisable to consider purchasing a building. This would enable the organisation to address the issues raised, provide an asset for the future and reduce resources spent on rent.

This could be done in one of three ways: -

1. Purchase an existing building to house the whole of the CVS and its projects. This would need to be in a central location as the core business of the CVS and the Volunteer Centre need to be both visible and accessible.
2. Purchase a piece of land and build a purpose built centre for the CVS.
3. Purchase a slightly smaller building to house the projects together whilst the Development Team and the Volunteer Centre remain in Meeting Point House. As the Carers contact centre and the Parents Partnership have a referral-based system and Transport is accessed via telephone there would be an element of flexibility as to the location.

Staffing

TWCVS have a strong and committed staff team. A number of staff were interviewed for the review and this highlighted some issues. One was that of capacity. Staff recognise that there is an un-met need within the community and that there is not always the resources to deal with it. This unfortunately is the nature of the business and very difficult

to address but as was raised previously, additional resources could be beneficial in some areas in particular the Volunteer Centre, Funding support and ICT & Information.

It was also felt that there was a need for more administration staff across the whole organisation.

The other issue raised was that of communication between projects. It was felt that better communication would be good for the whole of the organisation enabling staff to share information and make better use of resources.

This could be helped through the introduction of an annual away day for all staff to discuss issues relevant to the whole of the CVS.

Funding

Financially TWCVS is currently in a healthy position but it is heavily reliant on the Local Authorities, who are the organisation's major funders. Without some security in place this could be subject to, in the future, changes in policy, politics or budgets which puts the organisation in a vulnerable position therefore would be advisable to endeavour to negotiate three year Service Level Agreements in all service areas if possible.

Alternatively grant funding could be sought to match the Local Authority contribution for the projects to reduce this reliance.

It has also been identified that voluntary and community groups would benefit from a Community Chest scheme which would allow funds to be dispersed to voluntary and community groups using a specific panel.

Governance

As part of the Change-Up initiative a code good practice for governance has been developed. The Code is a set of principles for charities and voluntary organisations which ensure that the highest possible standards of governance are set for the voluntary and community sector which TWCVS may wish to consider adopting. As voluntary and community organisations working for public benefit, we are increasingly expected to demonstrate how well we are governed. Good governance is a vital part of how voluntary and community organisations operate and are held accountable.

It is therefore good practice to regularly review the Governance of the CVS and as part of this TWCVS may wish to consider the following options:-

- That the Board ensures all Trustees have the information; training and support to further develop the CVS.
- That a review of the Memorandum and Articles is undertaken.
- That in future Trustees Role Descriptions are introduced to ensure new Trustees have a clear understanding of their roles and responsibilities.
- That there is an increased representation from the voluntary and community sector amongst Board members to ensure the users help to shape the development of the CVS.
- That there are functional links between identified Trustees and individual projects as well as staff members to ensure a working knowledge of CVS activity at a Board level.
- That Trustee membership should be time limited.

PQASSO quality standards are an excellent management tool and if implemented would automatically guide the CVS through many of these points.

Reserves

TWCVS's current reserves are currently in a strong position. The accounts set out that the trustees are of the opinion that TWCVS requires a minimum level of reserves approximating to three months projected running costs.

'There is no specific legal rule dictating the amount or proportion of a charity's income funds that can be held as reserves but the rule of thumb is 3 months running costs. Areas of activity, funding sources, future needs, opportunities, economic conditions, contingencies and the risks being faced are factors, which determine a charity's reserves level. A risk assessment is an important step in helping a charity to identify the right level of reserves.

Setting a reserves policy and, in particular, identifying free reserves helps inform the way in which a charity manages its cash, liquid assets and debt: its treasury management approach. A comprehensive reserves policy will also assist trustees when planning and explaining their approach to stakeholders. Trustees are legally required to publish their charity's reserves policy in their annual report'.

Charity Commission current Regulatory Report

As previously mentioned under accommodation as TWCVS are currently in a particularly strong position financially it may be in the organisation's best interest to invest this money in the purchase of a building for the CVS thus making best use of the organisations assets and reducing resources spent on rent. Having such an asset would ensure financial security for the future.

It would also benefit the organisation to develop a reserves policy.

Options/Recommendations

TWCVS has seen considerable growth over a five-year period and all indications are that this will continue therefore it is important to ensure that there are the resources in place to meet this demand.

- 1) I would recommend that in response to increased needs and activity additional resources be provided within CVS Volunteer Centre.**
- 2) Consideration should be given to the creation of a specific fundraising post.**
- 3) The development of an ICT strategy to support the growing ICT needs of the CVS and the sector.**

Training is an area that is provided by all areas of the organisation could be developed more with an increased benefit to the organisation and its users.

I would recommend that TWCVS: -

- 4) Introduce a charge in future and would suggest that a fee of £40 for members and £60 for non-members would be appropriate.**
- 5) The development of a training arm to make training a key delivery area.**
- 6) The consideration of developing an accredited training programme and becoming an Open College Network (OCN) accredited organisation**
- 7) Encourage staff to become C &G 7407 qualified to enable them to have a greater role in the deliver of training.**

Specialist Services – when problems arise increasingly groups turn to the CVS for support and information. But it is difficult to predict demand and can be costly. Possible ways of deliver in this area are: -

-) TWCVS could hold a contract on the sectors behalf with specialist organisations to provide information and support for groups. This could prove costly especially if under used.
- Alternatively TWCVS could try to negotiate subsidised agreements with local specialists to provide information and support but over-demand could make this unworkable.
- Another option maybe to signpost to other organisations that provide these services, i.e. ACAS for employment.
- Finally TWCV could work together with other regional CVS's to either share expertise or jointly buy in specialists, which would help to spread the cost.

8) Initially I would recommend that TWCVS consider the final option of working with other CVS's to provide this service. This has been done in Shropshire between the CVS's and appears to have worked quite well. This would give an opportunity to gauge usage.

Membership

9) I would recommend that TWCVS moved to a scaled membership rate based on organisational income.

Accommodation is an issue for TWCVS whilst the current accommodation is in a good location it lacks space. This could be addressed by one of the following:-

- Purchase an existing building to house the whole of the CVS and its projects. This would need to be in a central location as the core business of the CVS and the Volunteer Centre need to be both visible and accessible.
- Purchase a piece of land and build a purpose built centre for the CVS.
- Purchase a slightly smaller building to house the projects together whilst the Development Team and the Volunteer Centre remain in Meeting Point House. As the Carers contact centre and the Parents Partnership have a referral-based system and Transport is accessed via telephone there would be an element of flexibility as to the location.

10) I would recommend that all options be researched to inform the final decision.

Funding- although financial healthy at the present time TWCVS is heavily reliant on the local authorities and therefore could be in a vulnerable position if changes in policy, politics or budgets occurred.

11) I would recommend that TWCVS endeavour to negotiate three year Service Level Agreements in all service areas as a priority.

12) I would recommend that TWCVS consider developing a Community Chest Scheme for local voluntary and community groups.

Governance - As part of the Change-Up initiative a code good practice for governance has been developed. The Code is a set of principles for charities and voluntary organisations which ensure that the highest possible standards of governance are set for the voluntary and community sector.

- 13) *I would recommend that TWCVS adopt the Code of good practice developed as part of Change-Up and as part of that process consider the following: -*
- *) That the Board ensures all Trustees have the information; training and support to further develop the CVS.*
 - *That a review of the Memorandum and Articles is undertaken.*
 - *That in future Trustees Role Descriptions are introduced to ensure new Trustees have a clear understanding of their roles and responsibilities.*
 - *That there is an increased representation from the voluntary and community sector amongst Board members to ensure the users help to shape the development of the CVS.*
 - *That there are functional links between identified Trustees and individual projects as well as staff members to ensure a working knowledge of CVS activity at a Board level.*
 - *That Trustee membership should be time limited I.e. no longer than three years.*
- 14) *I would recommend that TWCVS follow PQASSO Quality Standards to aid this process.*

Reserves – TWCVS’s current reserves are running at rather a high level and could possibly be better invested for the benefit of the organisation.

- 15) *I would recommend that TWCVS respond to its accommodation needs and considers investing some of the current reserves into the purchase of a property. This may also be*

used as a resource for other groups within the voluntary and community sector.

16) *I would recommend that TWCVS develop a reserves policy, which would be agreed by Trustees.*

17) *I would recommend all the above be implemented through the construction of a Strategic Plan agreed by CVS Trustees using the review findings as its point of reference. The Strategic Plan should also propose relevant time scales for each of the recommendations included within it.*

Glossary of terms

1. Published by the Active Community Unit of the Home Office in June 2004, Change Up is a 10 year Government strategy designed to put in place effective and high quality infrastructure services in order to meet the needs of the sector. Additionally, strategies on Governance, Performance Improvement and Skills have been published separately, but all inform Change Up
2. The strategic aim of SRB6 is to work with the local community to bring about the long-term and sustainable regeneration
 - Improving the employment prospects, education and skills of local people.
 - Addressing social exclusion and improving opportunities for the disadvantaged.
 - Promoting sustainable regeneration, improving and protecting the environment and infrastructure.
 - Supporting and promoting growth in local economies and businesses.
 - Reducing crime and drug abuse, and improving community safety.
3. The voluntary sector is a range of umbrella organisations, networks, and other intermediary bodies, which provide support to voluntary, and community organisations.
4. The Compact Advocacy Programme was set up, and is run, by the voluntary and community sector for the sector. Based at the National Council for Voluntary Organisations (NCVO), it provides practical support and wider campaigning to the sector in cases where the Government has breached the Compact.

Since 2002, the Compact Advocacy Programme has been instrumental in ensuring compliance with the Compact at a national level through advocacy, and campaigning and lobbying government departments on behalf of the sector. The Programmes work at a national level has shown that with the help of an advocacy service Compacts can be given "teeth" and can transform the way the voluntary and community sector and government interact with each other.

Local Compact Advocacy

The Compact Advocacy Programme has secured funding from the Big Lottery Fund to expand its work. The latest phase of the programme includes a positive drive to implement local Compacts and bring about a major change in the relationship between the voluntary and community sector and local statutory bodies. By taking up individual instances of Compact breaches and engaging in wider campaigning the Compact Advocacy Programme will provide a mechanism to ensure local Compacts work.

For more information on the Compact Advocacy Programme and the support offered to the sector visit NCVO's website www.ncvo-vol.org.uk/compactadvocacy.