

South West Voluntary and Community Sector Infrastructure Plan

Consultation Draft
February 2006

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Executive Summary

South West VCS Infrastructure Plan (SWIP)

The Role of the Voluntary and Community Sector in Service Delivery – A Cross-Cutting Review (HM Treasury, 2002) recognised that despite a transformation in the contribution of the voluntary and community Sector (VCS) to service delivery, many frontline organisations were still unable to access the support they required. It further recognised that the sector and government shared a mutual interest in building the capacity of voluntary and community organisations.

The review led to *Change Up - the Capacity Building and Infrastructure Framework for the Voluntary Community Sector*, which set out the bold aim: **That by 2014 the needs of frontline voluntary and community organisations will be met by support which is available nationwide, structured for maximum efficiency, offering excellent provision which is accessible to all while reflecting and promoting diversity and is sustainably funded.**

In the South West region, the VCS with key public sector partners have agreed that this regional strategic approach should be taken forward through the development and implementation of the South West Infrastructure Plan (SWIP) in line with the national aim.

The main purpose of the Plan is to provide a clear strategic framework for the development of VCS infrastructure in the South West region. In particular, the Plan is designed to guide decisions on investment in infrastructure from national, regional and local sources. The Plan seeks to help sub-regional consortia and regional organisations and partnerships identify their appropriate and respective roles.

The national vision has been translated into a South West aim reflecting the particular needs and features of region, which is:
By 2014 the needs of frontline voluntary and community organisations in the South West will be met by support which is available across the region, structured for maximum efficiency and offering excellent provision which is accessible to all and sustainably funded. Support will be provided in ways which meet the particular needs of groups in urban and rural areas. Support for BME and other equality groups through mainstream and specialist provision will be consistent across the region but be delivered in ways appropriate to and determined by those communities.

A consultation event held in November 2005 was a key means of shaping this Plan and developing the Directions for Change and the Strategic Priorities for Action. These form the main body of the Plan.

The Directions for Change are:

- ⇒ Communication, collaboration and networking
- ⇒ Promoting and understanding the sector
- ⇒ Quality local level support
- ⇒ Making investment sustainable
- ⇒ Embedding equality and diversity
- ⇒ Ensuring rurality proofing
- ⇒ Local Area Agreements

The Directions for Change are the key themes which need to be embedded across all Strategic Priorities. They provide the foundations for successful development of an effective and efficient VCS infrastructure in the South West.

The Strategic Priorities for Action relate to:

- ⇒ Performance Improvement
- ⇒ Workforce Development
- ⇒ Information Communications Technology
- ⇒ Governance
- ⇒ Recruiting and Developing Volunteers
- ⇒ Financing Voluntary and Community Sector Activity

The Strategic Priorities for Action reflect the national ChangeUp framework's "high level" objectives and are geared to specific achievable targets over the next two years.

1. Background

What is the Purpose of the Plan?

1.1 The main purpose of the Plan is to provide a clear strategic framework for the development of a self sufficient voluntary and community sector (VCS) infrastructure in the South West region. The Plan is intended to provide the basis for planning and investment over the next two years (06/07 and 07/08) in the provision and development of infrastructure within the region to ensure effective, efficient and co-ordinated services and representation for front line organisations. Further it aims to facilitate better planning of services, the targeted allocation of resources and impact evaluation of infrastructure services aimed ultimately at improving the social and economic conditions of communities and individuals.

1.2 More specifically the Plan is designed to guide decisions on investment in infrastructure from national, regional and local sources. These include Capacity Builders and Big Lottery Fund at national level, SWRDA and the LSC regionally and, in particular, local authorities and PCTs at local level.

1.3 The Plan will act as an important planning tool for all those (within and out with the VCS) seeking to improve and develop infrastructure by identifying the links and relationships between existing and emerging infrastructure at national, regional, sub regional and local/neighbourhood level. The Plan is designed to help sub regional consortia and regional organisations and partnerships to identify their appropriate and respective roles.

1.4 The Plan should also be regarded as a means of articulating and advocating the need for greater investment in VCS infrastructure from a wide range of public sources and for increased long term financial stability and sustainability. It should be noted that the development of this Plan has been led by the voluntary and community sector but with the involvement of a range of public sector partners. The Plan reflects a pro-active VCS led approach. It has been prepared because the sector has regarded it as critically important not because government has required it.

How the Plan was developed?

1.5 The overall development of the Plan has been guided by the South West Infrastructure Steering Group with detailed planning and specific tasks undertaken by the Strategy Sub Group with support from the ChangeUp Support Programme. (Gina Aylward who manages the Support Programme has led the officer support for the process.) The Consultation Event held on 30th November 2005, was a key means of shaping this Plan and identifying the Directions for Change and developing Strategic Priorities for Action. The process used at the Consultation Event is described in the appendix.

1.6 Key stages in the development of the SWIP thus far have been:

June/July 2005	Draft ChangeUp Investment Priorities and Links document published by BSWN
8th July 2005	First Strategy Sub-Group Planning Meeting
10th Oct 2005	Strategy Sub-Group considers draft template
30th Nov 2005	SWIP Consultation Event
8 th Feb 2006	Strategy Sub Group signs off Draft for Consultation
16 th Feb 2006	Draft published for consultation

What is the national context?

1.7 The original ChangeUp Framework – ***Capacity Building and Infrastructure Framework for the Voluntary and Community Sector, 2004*** and the more recent ***Developing Capacity; Next Steps for ChangeUp, March 2005*** – identify the need for a co-ordinated and strategic approach to infrastructure development at regional level. This is reflected in the following statements.

“Locally, sub-regionally and regionally, stakeholders should come together to agree the shape and structure of provision which best suits the needs of frontline organisations and how it should be funded” (2004)

“Local, sub-regional and regional Infrastructure Development Plans should detail how the needs of diverse organisations and communities are best met ...” (2004)

“Decision-making is increasingly being devolved to the regional voluntary and community sector as partnerships develop and strengthen.” (2005)

“Capacity Builders will support innovation across the programme and in particular will fund path finding activity at regional level to enable the development and sharing of good practice.” (2005)

1.8 In the South West, the VCS, together with key public sector partners have agreed that a regional strategic approach should be articulated and taken forward through the development and implementation of this South West Infrastructure Plan.

1.9 During 2005, the Big Lottery Fund (BLF) announced that a new funding programme would focus on voluntary and community sector infrastructure. The full details of this programme, called BASIS, are not due to be announced until Spring 2006.

1.10 BLF needs to ensure that its priorities and investment decisions complement the national ChangeUp programme and in the South West the SWIP is regarded as key to achieving this.

1.11 The role of the SWIP in guiding infrastructure investment decisions is especially important, given that grant assessment and management for both Capacity Builders and the Big Lottery Fund will be handled nationally rather than regionally as before.

National ChangeUp Framework

1.12 The national ChangeUp framework provides a clear and explicit strategy for the development of VCS infrastructure. This SWIP shares the vision and objectives of the national framework and sets out how they can be achieved in the South West.

1.13 The national ChangeUp aim is:

That by 2014 the needs of frontline voluntary and community organisations will be met by support which is available nationwide, structured to maximum efficiency, offering excellent provision which is accessible to all while reflecting and promoting diversity, and is sustainably funded.

1.14 The national framework identifies six main types of infrastructure service and support that need to be developed in order to achieve this aim. The six so-called "high level" strategic objectives are as follows:

⇒ **Performance improvement**

⇒ **Work force development**

⇒ **Information and Communications Technology**

⇒ **Governance**

⇒ **Volunteering**

⇒ **Financing**

Cross-cutting themes

1.15 In addition the framework identified three key areas for actions which "cut across" the six high level objectives. These are summarised below.

Generic Infrastructure development

1.17 Cross-sectoral and inclusive review and planning exercises will take place to ensure good quality infrastructure provision is available in all areas by 2007. There should be local hubs of infrastructure activity delivering generalist and appropriate specialist functions in every local area and region by 2008. Tools and standards for performance improvement in VCS infrastructure should be in place by 2006.

Diversity

1.18 Specialist infrastructure organisations should be integral to the development of local hubs. Local, sub regional and regional infrastructure development plans should detail how the needs of diverse organisations and communities are best met in a given area and recognise the need for independent and accountable structures to represent and advocate for communities of interest.

Sustainability and infrastructure development.

1.19 Government departments should apply the Compact principles to VCS infrastructure. There should be a strategic approach (from government) to funding voluntary and community sector infrastructure - with clear reporting requirements that reduce the burden on frontline organisations and which focus on the difference made to users. Capacity building needs should be considered at the planning stage of major policy initiatives and programmes. When strategically funding frontline organisations, as part of full cost recovery, government should contribute to their capacity building costs.

National Hubs

1.20 The national framework includes the intention to establish a national hub of expertise for each of the six high level objective areas mentioned above, with each hub developing a business plan. Except for the volunteering hub – which was already being established by Volunteering England – all other hubs were to be set up and run by a partnership of national VCOs. At the end of 2005, all six national hubs had been set up, had appointed staff and were beginning to deliver services in line with their business plans.

Government policy

1.21 An effective, consistent and comprehensive VCS infrastructure is increasingly being recognised by public sector agencies as necessary if they are properly to fulfil their statutory duties and respond to central government's agenda for reform in the delivery of public services.

1.22 Central government explicitly recognises the importance of an active and expanding voluntary and community sector in both public service delivery and strategy development. This is clearly articulated in government requirements and guidance in relation to:

- ⇒ Local Area Agreements
- ⇒ Local Strategic Partnerships
- ⇒ Sustainable Communities Strategies
- ⇒ Local Compacts - including the Compact Plus proposals

1.23 Community and voluntary sector involvement is expected to be a key feature of a government white paper on decentralising power and modernising local government due in 2006. In commenting on the anticipated White Paper

David Milliband, communities and local government minister, has said that "*local government can have more power if it in turn hands more power to local people and neighbourhoods.*"

1.24 These policy initiatives and developments require a robust voluntary and community sector infrastructure if they are to be implemented effectively and have the impact government expects. The particular requirements and expectations are explored in more depth in section 6 of this Plan on local public sector engagement.

Regional Compact

1.25 As with local compacts, at regional level the South West Regional Compact provides a framework for relations between the VCS and key public sector bodies. Signatories to the Regional Compact include SWF, BSWN, GoSW, SWRDA, SWLGA and SW Regional Assembly. The Regional Compact stresses the importance of:

- effective and active VCS engagement and involvement in policy development;
- actively promoting and practising equality and diversity
- genuine partnership;
- promoting inclusion including a commitment to "*helping to make sure that organisations tackling exclusion have the resources they need*"; and
- improving funding relationships.

Achieving these aims requires effective and properly resources voluntary and community sector infrastructure at local and regional level.

Regional Economic Strategy

1.26 The 2005 review of the Regional Economic Strategy (RES) provided an opportunity to strengthen understanding and recognition of the role of the VCS including VCS infrastructure in relation to enterprise, economic development, employment, skills and learning. The Draft RES and Delivery Plan include the following regional intervention under the Strong and Inclusive Communities objective:

"strengthen the voluntary and community sector as a catalyst for economic inclusion"

Specific delivery actions under this intervention include:

- *Use the Regional Compact as a framework for effective engagement with the voluntary sector*
- *Implement the VCS Workforce Development Strategy*

1.27 In its submission on the draft Delivery Plan South West Forum (and no doubt others) has proposed the strengthening of this intervention and the inclusion of a specific reference to VCS infrastructure development.

1.28 SWF, BSWN, RISE. ESW and others have submitted comments on the draft RES and Delivery Plan and it is hoped that these will be reflected in the final Strategy and Plan when finally approved by Ministers in March 2006.

Other regional strategies and plans

1.29 A number of other regional strategies should be informed by and inform this Plan. They include:

- the South West Skills Strategy being developed by the South West Enterprise and Skills Alliance (SWESA)
- the Integrated Regional Strategy
- the Regional Spatial Strategy
- the South West Sustainable Development Framework
- the Way Ahead - South West Sustainable Communities Plan.

1.30 In addition it is important that this Plan meshes well with the organisational business plans and strategies of a range of regional organisations which while not specifically and solely geared to voluntary and community organisations do provide some VCS infrastructure services. These include:

- creating:excellence
- equality south west
- RiSE
- Market and Coastal Towns Initiative Association

Change Up in the South West - structure and mechanisms

1.31 A regional Steering Group was established in December 2003 to provide advice and guidance to GoSW on the management of the ChangeUp programme. The Steering Group comprised a range of VCS and public sector bodies. The function of the Steering Group was reviewed and revised in mid 2004 and this resulted in it having a more explicit "responsibility" for the ChangeUp programme in the region. The formal terms of reference of the Steering Group are currently as follows

1.32 Further revision and re-structuring of the Steering Group is under discussion in the light of changing arrangements for the management of the ChangeUp programme from April 2006 onwards. It is currently proposed that the group be called the South West Infrastructure Development Partnership with the purpose of establishing, sustaining and developing the voluntary and community sector infrastructure in the region, to meet and support the needs of frontline organisations. The partnership's key roles would be:

- To agree the South West Infrastructure Plan (SWIP) and any future revisions

- To agree strategic actions relating to the implementation of the SWIP
- To provide co-ordinated regional leadership on infrastructure development
- To champion investment in infrastructure development and modernisation

1.33 The ChangeUp investment programme in the South West commenced at the beginning of 2004 with the "early spend" phase. This provided total funding of £600,000 for the period December 2003 to March 2004. Funds were invested in the following main types of activity:

- sub-regional consortia development
- regional projects
- infrastructure mapping
- evaluation

1.34 The "main phase" of investment was implemented from early 2005. The total funding available (from ACU and DeFRA) for the South West was £5.8 million with a requirement that all spending under this phase had to take place by June 2006. (Originally the deadline was March 2006.) The main phase funding was allocated for the following types of activity

- sub-regional consortia capacity building - 11 consortia
- sub-regional infrastructure development projects and activities - total of 90 specific projects
- region-wide "thematic" projects - 14 projects
- ChangeUp support programme.

1.35 The capacity building element for sub regional consortia was designed to help build the consortia and enable them to prepare consortia investment and business plans. In most but not all cases main phase projects and activities built on work undertaken during the early spend phase.

1.36 The ChangeUp support programme (managed South West Forum and BSWN in partnership contracted to GoSW) has had the following main roles:

- facilitating and providing learning and support for all ChangeUp participants (e.g. learning events on equalities and social enterprise)
- brokering and (part) funding support for specific consortia (e.g. mediation)
- providing networking opportunities for consortia, region-wide projects and national hubs to encourage co-ordination, cooperation and joining-up.(e.g. national hubs event on 26 April 2005)
- leading the development of this Plan
- providing information and facilitating communication relating to ChangeUp (e.g. through email bulletin)

1.37 The relationship and links between the consortia investment plans and the region-wide/thematic projects and partnerships is described in the "investment

priorities and links" document published by BSWN through the Support Programme. It is clear however that the joining up of all ChangeUp funded activity in the South West and coordination with the emerging national hubs has been difficult. This Plan is a key element in the process of improving these connections.

ChangeUp activity in the South West

1.38 As stated above the "investment priorities and links" publication describes the priorities of consortia and region-wide thematic projects based on their original investment and business plans as submitted to and approved by GoSW. A summary of activities and achievements at sub regional and regional level in through the ChangeUp programme to date is in the Appendix.

1.39 Sub-regional consortia of infrastructure organisations operate in all parts of the region and cover the following areas:

- Bournemouth and Poole
- Bristol
- Cornwall
- Devon
- Dorset
- Gloucestershire
- Plymouth
- Somerset
- Torbay
- West of England
- Wiltshire and Swindon

1.40 Each consortium has focussed on a different set of priorities reflecting the identified needs in its geographical area. Most are undertaking activities on workforce development, performance improvement and finance and funding - although the scale and type of activity varies. The number of specific ChangeUp funded projects being managed by sub regional consortia varies from three to thirteen.

Region-wide thematic projects

1.41 The ChangeUp programme has funded 14 thematic projects which in most cases are operating region-wide. There are projects delivering under each of the six high level objectives although in most cases projects are operating across two or more of these objectives. (For example the South West ACRE Network is contributing to performance improvement and workforce development objectives.) It is only in relation to the workforce development objective that there is a clear regional strategic lead body or partnership. For each high level objective there are at least two regional projects delivering activities and in the case of performance improvement there are eight regional projects active. The BSWN publication provides a detailed picture of priorities and activities amongst the regional thematic projects.

Other Infrastructure Development Activity

1.42 Most voluntary and community sector infrastructure at local and sub-regional level has been and continues to be dependent on funding from local authorities and to a lesser extent PCTs. However a wide range of other sources have been tapped by infrastructure bodies to maintain their core functions or undertake specific projects. (In very many cases organisations depend on the overheads and cost recovery from project funding to maintain their core functions.) These include lottery funding (through Community Fund and Big Lottery Fund, European programmes, trusts and foundations (such as Lloyds TSB Foundation) and various central government programmes.

1.43 ChangeUp funding represents a small proportion of the current public sector investment in the region's VCS infrastructure.

1.44 In addition there are developments in VCS infrastructure which are taking place outside of the ChangeUp programmes. For example Funding South West has been developed as part of creating: excellence to improve access to and raise standards in funding advice and to network funding advisers. It is also facilitating improved co-ordination and better practice amongst funders. RiSE, supported by SWRDA, is working to improve business support for social enterprises including voluntary and community organisations.

Voluntary and Community and Social Enterprise Sector in the South West

1.45 It is estimated that the region has at least 25,000 voluntary and community organisations including over 16,000 registered charities and 1,800 social enterprises. The South West has the third highest number of registered charities of all English regions, after London and the South East, the third highest share of social enterprises of all UK regions and an above average level of social entrepreneurial activity.

1.46 Charities in the South West had a total income of £1.5 billion in 2004, of which £750 million was earned from fees for goods and services, membership and public service contracts.

1.47 The sector in the South West is characterised by a large number of relatively small organisations, at least in part, a result of the rurality of the region and the difficulties of achieving economies of scale.

1.48 The sector employs around 54,000 people, about 2.3% of the region's work force. The employment and economic contribution of third sector organisations is increasingly being recognised by policy makers. The region has the highest level of informal and formal volunteering of all English regions.

1.49 Further data on the voluntary, community and social economy sectors can be found in a new chapter written by South West Forum in the South West Observatory's on-line version of the State of the South West report. (www.swo.org.uk)

2. Vision, Aim and Principles

National Vision

2.1 The SWIP shares the national vision as set out in ChangeUp: the Capacity Building and Infrastructure Framework for the Voluntary and Community Sector (see 1.13).

2.2 Applying the national vision to the South West requires understanding of some particular characteristics of the region. These include:

the geographical size of the region and the travelling time and distances between communities;

the region's demographics including, in particular, the variation in black and minority ethnic population between parts of the region;

the historically "patchy" provision of infrastructure across the region and relatively low levels of public investment in many parts of the region; and

A region with a predominantly three tier (including parish councils) local government structure.

South West Aim

2.3 The national vision has been translated into a South West aim reflecting and emphasising the particular needs and features of the region. This is:

By 2014 the needs of frontline voluntary and community organisations in the South West will be met by support which is available across the region, structured for maximum efficiency and offering excellent provision which is accessible to all and sustainably funded. Support will be provided in ways which meet the particular needs of groups in urban and rural areas. Support for BME and other equality groups through mainstream and specialist provision will be consistent across the region but be delivered in ways appropriate to and determined by those communities.

Core Principles

2.4 The SWIP is based on a set of core principles reflecting and expanding on the “cross-cutting themes” (see 1.15) contained in the national ChangeUp Framework. These are as follows:

- ⇒ effective sub-regional consortia are the main and core mechanism for planning and coordinating the development and delivery of infrastructure services;
- ⇒ infrastructure services should be provided at regional level only when this is the most effective and appropriate means of delivery, for example because of economies of scale and where regional agencies are engaged;
- ⇒ infrastructure provision must meet the needs of diverse organisations and communities and such organisations and communities must be fully engaged in the planning, development and delivery processes;
- ⇒ the need for certain communities of interest and place to have independent and accountable structures serving their particular needs must be recognised, supported and co-ordinated with mainstream provision;
- ⇒ the needs of small, community-based groups with limited capacity is a key priority for all infrastructure provision;
- ⇒ there must be improved coordination of infrastructure provision within particular geographical areas and between local, sub-regional, regional and national levels;
- ⇒ public sector engagement in the planning and development of infrastructure provision is essential at all levels; and
- ⇒ long term public sector investment is essential to the development of effective and efficient infrastructure provision.
- ⇒ Compact principles and agreed processes, as reflected in local compacts and the South West Regional Compact, will be followed in the development and implementation of this Plan

3. Directions for Change

3.1 The Directions for change provide the strategic focus for the SWIP and encompass all the Strategic Priorities for Action and the national cross cutting themes so providing a foundation for a comprehensive and effective infrastructure provision in the region.

Communication, networking and collaboration

3.2 Promoting and assisting partnership working and enabling co-ordination, networking to strengthen effective working at regional, sub regional and district level is essential for improved infrastructure "delivery" across all objectives. Improved communication and information sharing across the South West and strategic leadership from the sector for all strategic priorities are required.

3.3 Key ways through which these will be achieved are:

- ⇒ Concentrating on bringing together people who provide the same or specific services or work in a specialist area, or who provide services to same communities or client base.
- ⇒ Supporting organisations to look at ways in which increased or new collaboration can enhance service delivery and efficiency.
- ⇒ Providing mechanisms and embedding a culture of information sharing to improve, rationalise and co-ordinate information and communication within the sector so avoiding duplication and maximising quality.
- ⇒ Encouraging liaison and collaboration with the National Hubs to access optimum benefits across the region.

Promoting and understanding the sector

3.4 Effective marketing of the distinctiveness of the sector and increased advocacy to investors and policy makers apply to all strategic priorities. The VCS needs to see itself from a more objective perspective to be better able to market its strengths effectively and influence partners and investors.

3.5 This will be achieved through:

- ⇒ Developing clearer marketing strategies supported by sustainable investment streams.
- ⇒ Enhance the sector's potential to develop the improved strategic thinking and advocacy capabilities required to maximise resources and extend delivery of service provision.

Quality local level support

3.6 The importance of developing relevant and quality support for frontline organisations and ensuring investment in developing infrastructure has real and lasting impact are fundamental to all priorities for action.

3.7 This will be achieved through:

- ⇒ Ensuring frontline organisations have easy access to affordable products and services.
- ⇒ Recognising that one size does not fit all.
- ⇒ Investing in bespoke support provided by locally by people with the relevant expertise.

Making investment sustainable

3.8 The concept of sustainability runs throughout this Plan and is a vital component to its successful implementation. In this context, sustainability refers to the need to develop infrastructure that is needs-led and lasting. Historically, the VCS have been reliant on short-term funding opportunities leading to an inability to plan for the long term. This has resulted in both inefficiencies (e.g. duplication of service by more than one investor) and frustrations at local level as projects are fitted around funding opportunities rather than responding to the needs of the local community.

3.9 Sustainable investment and infrastructure will be pursued through:

- ⇒ Investing in the sector for the provision of specific needs-led services including: loans; contracts and Service Level Agreements; income generation opportunities and equity finance as well as traditional grant sources.
- ⇒ Encouraging a cultural shift both from the VCS (seeing itself as more business-like) and potential investors (seeing the sector as businesses that require investment in order to achieve social, environmental, economic and cultural goals).

3.10 Importantly, the development of this SWIP has confirmed that terminology should move away from language of dependence towards greater independence and inter-dependence – hence the term ‘**investment**’ in place of ‘**funding**’.

Embedding Equality and Diversity

3.11 The needs of equalities communities and their VCS organisations are integral to the work of ChangeUp. The key equalities communities relate to gender, disability, ethnicity, sexuality, age and faith. Many generalist infrastructure organisations have been slow to understand and respond to the particular needs of these communities or appreciate the diversity of experiences within them. Investment from ChangeUp requires the VCS to rectify this and it is

essential that a practical and pro-active approach to embedding and promoting equality and diversity is structured into all infrastructure development activity.

3.12 Specialist infrastructure organisations are integral to the development of local hubs of infrastructure activity, leading to strengthened partnership work to deliver high quality services. In particular, specialist infrastructure will achieve this by:

- ⇒ Advocacy for marginalised and disadvantaged communities at all levels;
- ⇒ Working with generalist infrastructure to ensure that capacity building support reaches and is appropriate to, those groups most in need
- ⇒ Targeted interventions to meet the specific needs of communities, for example in building leadership and representational skills and developing social enterprise approaches.
- ⇒ Establishing and improving mechanisms of service delivery to small, under represented groups and communities of interest
- ⇒ Developing forums and networks with traveller communities

Rural Proofing

3.13 The national ChangeUp Framework acknowledges that **‘the operating environment for rural frontline organisations is significantly different from [those in] urban areas’** and identifies eight key issues that might impact; including the dispersed nature of rural communities and the generally higher cost of service delivery compared to urban areas. This reinforces the need for organisations to ‘rural proof’ it’s operational and service delivery strategies so that people who are geographically excluded can participate in mainstream activity.

3.14 A rural area can be defined as having a population of 10,000 or less, according to the Countryside Agency. Those who live and/or work in rural areas may suffer isolation and economic and social disadvantage. They may have difficulty accessing opportunities to participate in employment or training, healthcare and transport – particularly affecting young and older people and BME communities.

3.15 Infrastructure development across all strategic priorities must recognise the need to:

- ⇒ Develop and implement long term plans backed by proper resources to enable it effective planning, implementation and evaluation of services for rural communities and groups.
- ⇒ Rural proof strategies and operations to enable critical issues to be identified for service delivery, leading to the development of solutions.
- ⇒ Collaborate and develop effective partnerships to improve service provision for rural communities and groups

Local Area Agreements LAA's

3.16 LAA's have been introduced by Central Government with the aim of delivering the very best services for local people by improving co-ordination between local authorities and other public sector agencies including primary care trusts, police etc. and "other partners".

3.17 The Government is clear that "other partners" means VCS and business and that representatives from the VCS must be empowered and encouraged to be involved at every stage from identification and shaping of local priorities through to delivery and review of performance.

3.18 Local Area Agreements (LAA's) are an opportunity for the ChangeUp consortia via appropriate representation to become fully engaged within their LSPs to ensure the VCS are involved in decision making, generating ideas, delivering services. In addition, LAA's provide an opportunity for Thematic projects and partnership to add their influence to the planning, delivery and review processes connected to LAA.

This will be achieved through:

- ⇒ Identifying appropriate VCS representation on LSP and other partnership/groups;
- ⇒ Defining how VCS representatives feed into their membership constituencies and communities of interest
- ⇒ Recognising requirements and resourcing of VCS engagement throughout planning, delivery, evaluation and monitoring processes of the LAA's
- ⇒ Identifying specific Local Authority and Public Sector support to enable VCS in contracting/procurement
- ⇒ Adherence to Compact principles when negotiating LAA's

4. Strategic Priorities for Action

4.1 The Strategic Priorities for Action reflect the six High Level Objectives of the national Change Up Framework. They have been developed through the generic consultation event and input from other sources and mechanisms including a consultation event focussed on BME infrastructure development issues.

4.2 Performance Improvement

The national high level objective is that by 2014

Frontline organisations are better able to improve their performance of their organisations, make choices about which tools are right for them and easily access support and advice.

4.2.1 The strategic priorities for **Performance Improvement** are:

- Promote and increase awareness of the value of Performance Improvement for organisational development
- Support and inform infrastructure organisations on Best Practice and Performance Improvement Tools, to enable effective delivery to frontline organisations

4.2.2 The specific actions are:

- Investment in skilled advisors in Performance Improvement methods based in infrastructure organisations
- Ensure investors and deliverers understand resource and capacity implications of implementing Performance Improvement processes
- Improve and establish mechanisms to ensure appropriate levels of service to small groups, rural organisations and under represented groups and communities of interest
- Develop and adapt existing Performance Improvement methodologies and tools drawn from all sectors

4.3 Workforce Development

The national High Level Objective by 2014:

There is a greater range of accessible development opportunities with increased take-up of learning opportunities by voluntary and community sector workers. Employers have improved access to support and advice on Human Resources issues.

4.3.1 The strategic priorities for **Workforce Development** are:

- The promotion, implementation and further development of the Strategic Plan for VCS Workforce Development in the South West (Stepping Stones)
- Promoting and facilitating the mainstreaming of VCS Workforce development needs and opportunities amongst public and private sector providers

4.3.2 The specific underpinning priorities for action which are reflected in the consultation draft of Stepping Stones are:

- Removing barriers prohibiting equity of access to workforce development opportunities and establish VCS equality champions to promote learning
- Promoting a strong commitment to workforce development, including through developing transferable lifelong learning plans.
- Investing in the continued evaluation of the impact of learning.
- Improving standards in staff recruitment and retention
- Improving access to and the availability of information about WFD opportunities
- Supporting and facilitating the co-ordinating of WFD provision at local and regional level to ensure consistency of access and provision across the South West.
- Promoting understanding of the VCS as a substantial and growing employer of staff and the sector's role in enabling people through volunteering to improve their skills and opportunities in the labour market

4.4 Information Communication Technology (ICT)

The national High Level Objective by 2014:

Frontline organisations and funders share a common awareness of the costs and benefits of ICT enabling them to make informed choices about its use. There are affordable and reliable support models in place, with user-friendly and relevant ICT advice available, including volunteering and pro bono support.

4.4.1 The strategic priorities for **ICT** are:

- Developing a South West strategic lead and support mechanism for effective ICT development
- Establishing accessible, affordable ICT support, products and services to all VCS organisations across the region
- Establish a regional association of ICT users and providers
- Ensuring investors and deliverers understand the benefits of the application of ICT
- Ensuring broadband access for all sectors in the South West

4.4.2 The specific actions are:

- Encouraging local VCS to make use of wireless connectivity
- Setting up mechanisms for purchasing affordable and appropriate equipment and ongoing training and support at a regional level
- Provide access to relevant, responsive and affordable local ‘hands on’ ICT support, e.g. circuit riders
- Establish and sustain a mechanism to update the sector on the latest technological developments
- Establishing core competencies at both management and operational levels

4.5 Governance

The national High Level Objective by 2014:

Board members are aware of their responsibilities and good practice and have access to accurate and helpful information and development. Being a trustee is more attractive and boards are more diverse, better reflecting the communities they serve.

4.5.1 The strategic priorities for **Governance** are:

- Establish a South West strategic lead and support mechanism to strengthen and promote good Governance in the region
- Support and development in effective Governance for BME organisations
- Inclusion of under represented groups in Governance
- Increase understanding of governance support needs and provision including motivation of trustees

4.5.2 The specific actions are:

- Training and promoting people of VCS organisations to be BME and equalities champions
- Exchange of cross sectoral resources and expertise around leadership and governance

4.6 Recruiting and Developing Volunteers

The national High Level Objective by 2014:

There is a leaner, effectively marketed and high quality volunteering infrastructure reaching, recruiting and placing a greater number and diversity of individuals coupled with improved volunteer management.

4.6.1 The strategic priorities for **Volunteering** are:

- Promoting, supporting and implementing the 'Building on Success' Strategy and delivery of the six Core Functions:
 - Brokerage
 - Marketing
 - Volunteering
 - Good Practice Development
 - Developing Volunteering Opportunities
 - Policy Response and Campaigning
 - Strategic Development of Volunteering
- Promote and explore opportunities across all sectors engagement in Volunteering

4.6.2 The specific actions are:

- Volunteering made accessible to all and any barriers addressed

- The quality of volunteering experience improved for volunteers
- Increasing the number of volunteers from all parts of society

4.7 Financing Voluntary and Community Sector Activity

The national High Level Objective by 2014:

Frontline organisations are able to take advantage of opportunities to diversify their income sources and demonstrate increased skill in contract negotiation and better standards in more effective fundraising.

4.7.1 The strategic priorities for **Finance** are:

- Establishing a South West strategic lead for joining up investment
- Developing and promoting programmes providing high quality investment advice and practical support across the region
- Promoting a culture of enterprise and innovation in approaches to investment within whole organisational structure
- Promote and ensure that VCS is able to access the full range of investment and financial services and products available to SME's

4.7.2 The specific actions are:

- Encourage consistent investment processes and systems
- Improving links and cross-referrals amongst funding and investment advisers
- Providing training in finance skills including accounts management, full cost recovery, fundraising, auditing, stock taking and contract negotiation

5. Cross Sectoral Partnership

Why invest in the VCS?

5.1 Voluntary and community sector organisations (VCOs) have a key role in providing public services which are distinctive from those provided by both the public and the private sector. VCOs are value based organisations, for which the principle of how a service is provided is often as important as what kind of work is carried out.

5.2 Front line VCOs have a good track record as providers of effective and innovative forms of public service which are both cost effective and well received by users. These services differ from those provided by the public and private sectors in that they are delivered by organisations which are independent of government and operated on a not for profit basis. VCOs can provide public services of as good or better quality as those provided by the public sector and they can provide these services at a considerably lower cost.

5.3 Consumers of public services, in particular those from vulnerable or socially excluded groups are often mistrustful of services provided by the public sector while those services provided by VCOs are generally trusted by people from those groups. This points to the desirability of cross sectoral partnership to widen the investment in the provision of public services in order to give consumers choice and offer culturally acceptable alternatives.

5.4 The independence of VCOs may lead to their isolation and they may find it hard to access appropriate support services such as: funding advice, staff development opportunities or access to guidance on best practice. For this reason front line VCOs require access to effective VCS infrastructure organisations to enable them to reach their full potential as providers of quality public services.

5.5 Without effective VCS infrastructure it is also impossible for the front line VCOs to represent themselves effectively or coherently to the public bodies.

5.6 There is a key role for the VCS at a regional level in working with SWRA, SWRDA, GoSW and others in co-ordinating the formulation of policy in relation to the delivery of public services across the South West.

5.7 The Government's "Together We Can Plan" launched by the Home Office's Civil Renewal Unit in June 2005 calls for active partnerships between public bodies, voluntary and community organisations and active citizens to work together to set and achieve common goals.

5.8 Hence public bodies at both national, regional, sub-regional, county/unitary and district level have a strong interest in helping to achieve the development of effective VCS infrastructure.

5.9 This interest has been recognised by Government and has informed the policy initiatives which led to the ChangeUp Framework (Capacity Building and Infrastructure Framework for the Voluntary and Community Sector 2004) its successor Capacity Builders (Developing Capacity; Next Steps for ChangeUp March 2005)

5.10 Similarly the Government expects or requires local authorities to ensure effective VCS involvement in Local Strategic Partnerships, Community Strategies and Local Area Agreements. This expectation acknowledges the importance of robust VCS infrastructure organisations capable of taking on this role.

5.11 The Government consultation paper (Local Strategic Partnerships: Shaping their future December 2005) asks "Should there be a statutory duty on local authorities and named partners to promote the engagement of the voluntary and community sectors in the LSP?"

5.12 All local authorities are required to produce a Community Strategy for their area. Government now expects these to evolve into Sustainable Community Strategies and provide the framework and priorities for LAAs. The engagement of the VCS in the development and delivery of Sustainable Community Strategies continues to be a clear expectation of government. The involvement of local residents is a particular priority. Both require effective VCS infrastructure.

5.13 The Government's consultation paper on Local Strategic Partnerships (LSPs: shaping their future) seeks to strengthen the relationship between LSPs, Sustainable Community strategies and LAAs and ensure an effective LSP for every area. The consultation makes clear that VCS involvement in LSP structures and process is critical.

5.14 At local/sub regional level VCS infrastructure is an important element of Local Area Agreements (LAAs) - in terms of both "process" and "content". Central government guidance requires that the VCS is engaged in the process of developing an LAA and requires each LAA to include a statement on VCS involvement. Such involvement maybe through existing membership of the Local Strategic Partnership and other mechanisms. This requires a robust "VCS representation" element of local infrastructure.

5.15 In addition the Safer and Stronger Communities "block" of LAAs has a mandatory outcomes relating to:

- Increased participation in local governance
- Increase in community cohesion and inclusion
- Increase in volunteering, and

- Growth of the voluntary and community sectors

Again VCS infrastructure is critical to delivering this outcome. Some (draft) LAAs make specific reference to sub regional consortia and ChangeUp funding in this context.

5.16 The VCS also plays a substantial role in other blocks of the LAA including delivering on outcomes relating to children and young people and healthier communities and older people. Ensuring the VCS have the capacity to deliver will commonly require increased investment in and/or more effective infrastructure.

5.17 By April 2006 LAAs will be operating in: Devon, Dorset, South Gloucestershire, Somerset, Cornwall, Swindon and Poole. All other parts of the region are expected to have adopted an LAA by April 2007.

5.18 In almost all areas of the South West there is now a compact between the public and voluntary and community sectors in place. The extent to which these compacts are being actively implemented and followed in day to day relations between specific public and voluntary organisations varies. Government clearly expects compact principles and agreements to be followed in relation to the development of voluntary and community sector infrastructure. The Home Office has launched a consultation document *Strengthening Partnerships: Next Steps for Compact* which invites comments on how the Compact can be moved forward to develop a stronger tighter compact - *Compact Plus*. If this initiative is to succeed effective VCS infrastructure will be needed to develop and implement *Compact Plus* locally.

5.19 In order for the VCS to undertake the roles it aspires to and which are expected of it by Government, then local authorities, primary care trusts and other organisations have an interest in investing in the development of effective VCS infrastructure at both local authority, PCT, sub-regional and regional level.

5.20 It is also important that the VCS voice be heard effectively at a sub regional level and there are a range of sub regional bodies that may wish to become investors in VCS infrastructure such as:

- Learning and Skills Council
- National Offender Management Service
- Police Authorities
- Fire and Rescue Authorities

5.21 The Government plans to launch a consultation exercise on the future shape of local government in the form of a white paper due in summer 2006. It is envisaged that proposals will include the abolition of county councils and the devolution of power to neighbourhoods.

5.22 If this comes about it will have massive implications for both local, sub regional and regional public bodies and for the voluntary and community sector and will reinforce the already pressing need for a robust and well resourced VCS infrastructure able to respond to these changes.

6. Implementation and Review

Maintaining and developing appropriate mechanisms

6.1 The importance of an agreed vision, values and decision-making framework to underpin the plan is essential. It is imperative that all stakeholders locally, sub-regionally and regionally shape the plan so that it truly reflects the needs of the diverse voluntary and community sector organisations and communities in the South West.

6.2 The regional infrastructure steering group and its associated sub-groups provide the strategic framework, which will facilitate contributions to the development, review and evaluation of the plan and will allow it to be continuously enhanced and improved.

Continuous monitoring and review

6.3 It is integral that all stakeholders contribute to the on-going monitoring and review of the Plan. The Plan requires the ownership and support of all partners and individual roles and responsibilities must be clearly set out.

6.4 The inclusion of views from all parts of the voluntary and community, and statutory sector on its priorities and activities will help ensure the plan is meaningful and relevant to all. Stakeholders will be responsible for communicating with people in their agency and to other interested parties on new developments. *Responses can be collated and channelled through consortia and the strategy sub group.*

6.5 A process and timetable for reviewing and evaluating this Plan will be developed.. This review will need to consider the extent to which the Plan has influenced the investment decisions of national and regional funders. Equally, it should identify the ways in which it has improved and developed the voluntary and community sector by identifying and developing links and relationships between existing and emerging infrastructure at national, regional, sub regional and local/neighbourhood level.

6.6 This process must effectively identify and address the challenges and barriers to achieving the plans main purpose. This will involve the need to

communicate effectively with a variety of audiences and to develop improvement action plans.

Advice and support to help organisations implement the plan

6.6 This document will act as an important planning tool for all those seeking to improve and develop infrastructure. It is intended to help identify good practice and sign post all stakeholders to the variety of infrastructure and statutory agencies able to provide advice and support.

6.8 A list of infrastructure organisations in the South West and a description of the services and functions they provide are available in appendix and through www.southwestforum.org.uk

6.9 The promotion of a partnership approach is at the heart of the Government's modernisation agenda. Government office for the South West (GoSW) will seek to promote policy development, programme delivery and partnership working in consideration of the priorities outlined in this plan. As partners, influencers and enablers GoSW can offer advice and support to VCS organisations on how this plan can help them. (Contact details are provided in the appendix.)

Promotion and Awareness raising

6.10 The emerging identity of a modernised voluntary and community sector for the South West region is being driven by a strategic development process led by the regional steering group and influenced by key stakeholders in the South West. Ultimately the desired outcome of awareness raising activity, therefore, is to engage all key stakeholders to influence and be influenced by the "voice" and needs of the VCS in the South West.

6.11 The regional steering group has adopted a communications strategy to coordinate coherent messages around Changeup. Through this plan, the use of the communications strategy and the leadership role of the Steering Group current and potential stakeholders will be kept informed about success stories, achievements, challenges and aims of the voluntary and community sector infrastructure.

6.12 Awareness raising and promotional activity with all stakeholders revolves around activities aimed at all levels and targeted through a variety of channels: modern tools such as the Changeup South West Intranet site (www.changeupsw.webexone.com) and electronic news bulletins as well as more traditional methods of promotion such as presentations, newsletters, and consultation events are used to ensure timely key messages reach target audiences in the most appropriate way, making special efforts to reflect the needs of excluded groups and those stakeholders with 'special needs'.

Further Consultation and planning for the longer term

6.13 The South West Infrastructure Plan is a document intended to guide and inform the strategic development of a modern voluntary and community sector. The intended long term benefits of Change-Up will be the strengthening of frontline VCS organisations including building their capacity to deliver public services and represent their community and communities. Representation - ultimately improving the quality of life for the people and communities who use their services.

6.14 At the time of producing the South West Infrastructure Plan the distance travelled towards the government's 2014 aspiration is a mere 2 years, despite it being early days, many valuable contributions have been brought together to help tackling the needs of the sector .

6.15 Realistically, the future course charted through the Plan will need to be reviewed and reappraised on an ongoing basis to ensure appropriate adjustments to strategy and priority are made to keep the agenda on track. In this regard the Regional Steering Group would like to both thank all contributors for their invaluable involvement to date and seek the ongoing input of all stakeholders with a keen interest in the advancement of the VCS to bring about greater mutual understanding of the sector and its needs.

6.16 It is the collective responsibility of all stakeholders and not just the VCS or even the Regional Steering group alone to drive change to better meet the needs the frontline VCS of the South West.