

Improving outcomes for older people:

Resources guide for voluntary and community sector
organisations providing older people's services

A report for the
West Midlands Later Life Forum and RAWM

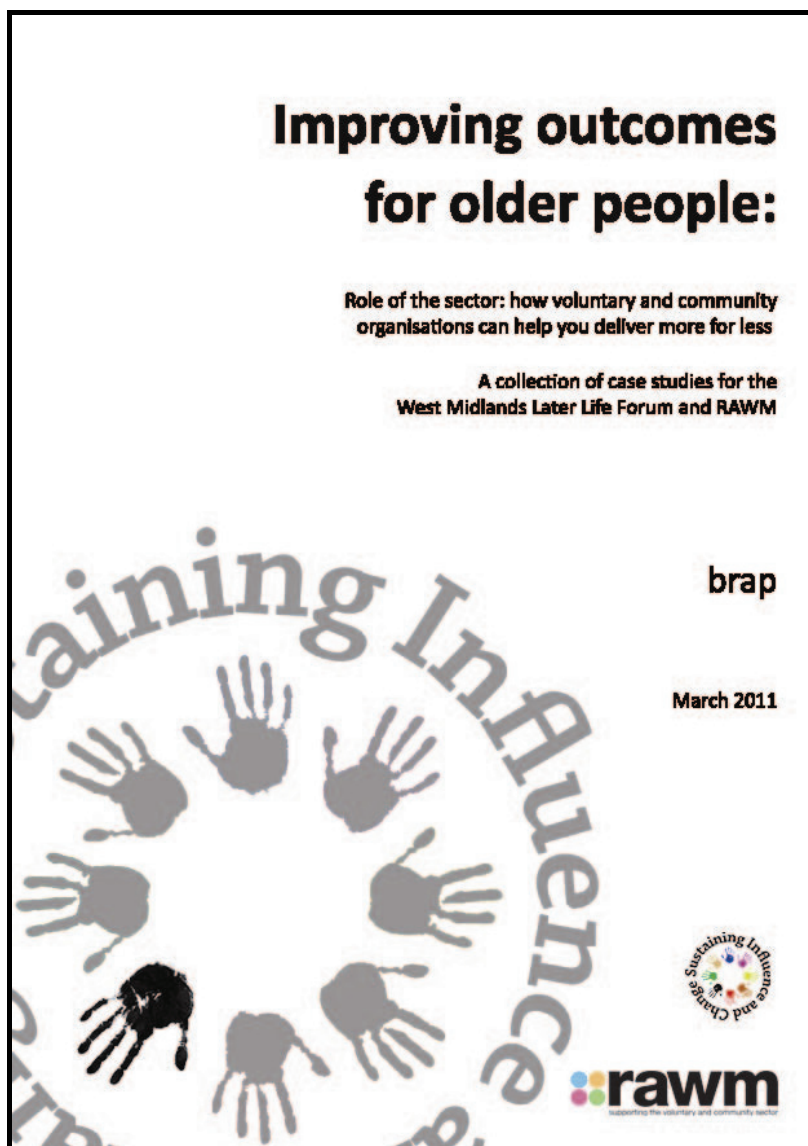
brap

March 2011



READERS NOTE

This guide has been produced alongside a series of case studies, outlining how later life VCOs are helping public bodies meet their new roles and responsibilities whilst delivering better outcomes for older people.



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HOW TO USE THIS GUIDE

This guide is for voluntary and community organisations providing services to older people. The guide is organised into two key sections:

Section 1. Outlines some of the challenges (and opportunities) later life voluntary and community organisations (VCOs) are facing given the political and economic changes in the policy and commissioning landscape. It also highlights what these changes could mean for you and your organisation.

Section 2. Outlines some of the existing guidance and resources that will help later life VCOs respond to these challenges within the new environment. For ease of access, the resources are listed under ten headings:

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SECTION 1 WHAT ARE THE CHALLENGES FACING VCOs?

Even before the change of government in May 2010, the later life policy environment was undergoing rapid and profound change. A move towards preventative services, a focus on personalisation, and greater concern with maintaining independence have all changed the way later life VCOs are delivering services.

The change of government and attendant funding cuts, however, has accelerated this pace of change. Since early 2010, local authorities have had to reconsider their service provision in the light of new roles and responsibilities, including:

- local authority budget cuts in adult social care, residential care and housing
- large-scale change in the structures that commission health, public health and social care – particularly the closure of primary care trusts and strategic health authorities and the delegation of decision-making powers to GP consortia, local authorities, and local health and wellbeing boards
- new structures where local people and VCOs have an opportunity to influence and shape services and commissioning decisions (e.g. Healthwatch and local health and wellbeing boards)
- new opportunities for the voluntary and community sector to deliver public services, the ‘opening up’ of the market to both VCS and private business providers, and the ‘right to challenge’ to run local authority services
- increased emphasis on public health and preventative services and increased responsibility placed on people for their *own* and their *own community’s* health¹
- increased choice and information for ‘customers’ that will use individual budgets to ‘purchase’ services

These changes bring with them some key challenges, but also a number of opportunities for later life VCOs. An event held by RAWM in partnership with Age UK in February 2011 discussed these issues. Over 60 people attended. Some of the challenges identified by those people were:

- being asked to do ‘more for less’ by commissioners. Many highlighted the effect of competition on prices and the effect this will have on quality of services
- not knowing *who* to market services to in the future and *how* this should be done
- the need to develop partnerships with other later life VCOs in order to strengthen and extend services and to speak with ‘one voice’ – but not knowing who to partner with or how to go about it in the right way
- responding to new standards (e.g. regulatory standards or quality standards requested by commissioners)
- the implications of personal budgets and challenges faced by VCOs that will find it hard to budget and plan services (for example, not knowing how and when individuals will spend their budgets)

¹ Another briefing paper produced by brap for RAWM outlines those policy and funding changes in some detail. This paper can help you to decide which of these changes is most likely to affect *your* organisation in the future. For more details, visit: www.rawm.org.uk

- making sure older people are listened to in new decision-making structures (e.g. Healthwatch) and ensuring there are a range of methods for engaging with them.
- supporting older people to make best use of personalisation and supporting those who don't want to make a choice

Responding to new challenges

Those present also outlined a wide range of ideas about how they would respond to these challenges:

- being flexible in approach, diversifying services and moving into new areas of work and new markets
- supporting board and staff members to reflect on the new funding/policy environment and develop/buy-in to new strategies
- offering better solutions to commissioners (e.g. GPs), demonstrating the impact services will have and cost savings that could be achieved
- restructuring organisations or reducing salaries to cut costs
- changing the ways of working to be more innovative and cut costs (e.g. use of tele-care and tele-health)
- shifting from 'funding' to 'selling' services: 'getting commercial' – marketing, sales, and creating a 'story' about who we are, what we do, and our value
- working hard to establish new links and relationships with potential commissioners, understanding what people want to purchase
- creating a space in which the VCS can engage with potential commissioners (e.g. GP consortia) to discuss community needs and commissioning priorities
- creating productive partnerships between VCOs to deliver services and engage decision-makers with a shared voice. This means building trust between organisations, identifying weaknesses and gaps in service provision and understanding who could help to fill them
- learning from where personalisation is working well

In other words, the sector is setting itself some big goals – and some big questions – for the future. The resources in this next section will hopefully highlight some of the tools and guidance available to help you realise the opportunities arising from this new political and economic environment.

SECTION 2 AVAILABLE GUIDANCE & TOOLS

What follows is a light touch review of a range of useful guidance, briefings and toolkits designed to help VCOs respond to these challenges. Finding guidance that is 'right' for VCOs providing older people's services is not without its own challenges. The sector is diverse – ranging from small charities offering lunch clubs or day trips, for example, through to the largest national charities and social housing organisations. Consequently, guidance that works well for some may not be considered relevant by others. In conducting this review, care has been taken to identify guidance and tools that:

- can be used by a range of different types and sizes of VCO
- respond to the issues highlighted by VCOs as important
- are of high quality and are useable
- can be accessed online or for free

In conducting the review it became quickly apparent that recent policy changes have begun to make some guidance (even those produced three or four years ago) look remarkably dated. Where this was the case the guidance has been omitted from this document.

Each item is briefly summarised under ten key headings:

1. forming partnerships and networking
2. restructuring/cost-cutting
3. demonstrating impact and value
4. marketing services
5. getting to know funders – practical tips on how to find them
6. diversifying services
7. moving from funding to selling
8. case studies of where personalisation is working well
9. negotiating and shaping public service contracts
10. future thinking: working with boards and beneficiaries to develop new strategies for your organisation

A note on using the guidance

This guide has been produced alongside a series of case studies, outlining how later life VCOs are helping public bodies meet their new roles and responsibilities whilst delivering better outcomes for older people. When reading this guidance we would encourage the reader to consider it alongside that discussion paper. Doing this could help you to think critically about the guidance and how it applies to the current state of affairs for later life VCOs.

Take for example, guidance about 'forming partnerships'. When reading this you should be considering what kind of partner your organisation might require in the current political and economic environment. Many VCOs will be looking for a partner that can allow them to share risk when delivering public service contracts, some will need a partner with access to enough up-front capital to offer public services quickly that can be purchased by public authority commissioners and individuals alike. Later life VCOs will also need to be considering the particular value or size of contract that will make partnership working feasible.

Or take guidance on 'marketing services' and 'demonstrating impact and value'. Given what you know about the current funding and policy environment, where and how will commissioners want you to demonstrate benefit? Many GP consortia will be new to commissioning and will be looking for an easy to understand explanation of what you are offering and how that can help them meet their obligations to achieve the NHS Outcomes framework. Similarly, value for money will be a key consideration for many commissioners. You may want to consider how you can use the guidance below to help you to demonstrate this.

Summary of Guidance & Tools

2.1 Forming Partnerships and Networking

Benchmarking made simple

Dr Sue Rudkin for the Performance Hub (2008)

Benchmarking can be a useful way of comparing the practices, procedures and performance of one organisation with those of another. It can be a good 'way in' to sharing good practice and coming up with solutions to common problems. It can also offer a starting point for discussions when organisations have considered joining forces to deliver services together.

http://www.improving-support.org/resources/1286625652_benchmarking_made_simple.pdf

Collaborative Working Models for Winning Public Service Contracts

ACEVO (n.d)

Focuses on the types of business models that will help organisations to form productive partnerships to deliver public services.

<http://www.acevo.org.uk/Document.Doc?id=1338>

Forewarned is forearmed: critical factors for mergers

Association of Charitable Foundations reports on research carried out by the Institute for Voluntary Action Research (2010)

Short, easy to read article about what to look out for when considering a merger.

<http://www.cuts-watch.org.uk/uploads/files/Forewarned%20is%20Forearmed.pdf>

Joint Working Agreements

NCVO (2006)

Short guide to joint working agreements produced by NCVO's Collaborative Working Unit.

http://www.ncvo-vol.org.uk/uploadedFiles/NCVO/What_we_do/Collaborative_Working_Unit/Information_and_advice/Joint%20working%20agreements.pdf

Set up and register a partnership

Business Link website (2011)

Short, practical guide for businesses on how to set up a partnership (legal and tax issues).

<http://www.businesslink.gov.uk/bdotg/action/detail?itemId=1073789502&type=RESOURCES>

Should you collaborate? Key Questions

NCVO (2005)

This short briefing includes a checklist to help VCOs decide whether to embark on collaborative working and partnership.

[http://www.ncvo-vol.org.uk/uploadedFiles/NCVO/What we do/Collaborative Working Unit/Information and advice/Should you collaborate PDF.pdf](http://www.ncvo-vol.org.uk/uploadedFiles/NCVO/What_we_do/Collaborative_Working_Unit/Information_and_advice/Should_you_collaborate_PDF.pdf)

Top 10 mistakes businesspeople make when forming partnerships

All Business website (n.d)

US article that outlines some simple tips for avoiding common mistakes when businesses decide to form partnerships.

<http://www.allbusiness.com/business-planning-structures/business/4009-1.html>

Twelve Golden Rules for Tendering as Consortia

Briefing note produced by Tendering for Care (2008)

Some basic issues to consider when you've already decided to tender as a consortium.

<http://www.tenderingforcare.com/system/files/golden%20rules.pdf>

Working in a consortium: A guide for third sector organisations involved in public service delivery

Cabinet Office/Office of the Third Sector (2008)

Particularly useful in discussing how to consider the pros and cons of forming consortia.

<http://webarchive.nationalarchives.gov.uk/20081230001423/http://www.cabinetoffice.gov.uk/media/107235/consortium%20guide%20final.pdf>

Collaborative Working & Mergers

Charity Commission (Trustees & Governance series) (2009)

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

<http://www.charitycommission.gov.uk/Library/guidance/cc34text.pdf>

Coping With Cuts: Practical Advice Guides

NCVO (2010)

NCVO has produced a number of practical advice guides covering a wide range of issues to do with sustainability and coping with the cuts. Worth focusing on in particular is 'Managing your workforce' which includes sections on communication and transparency during restructuring, motivating and engaging staff, avoiding redundancies, ensuring fair redundancies, developing your staff on a tight budget and managing volunteers.

<http://www.ncvo-vol.org.uk/advice-support/coping-with-cuts-practical-advice-guides>

The Economic Downturn: 15 questions trustees need to ask

Charity Commission (2009)

Simple list of questions for trustees that encourage them to consider how their organisation can respond to financial challenges (focus on finance, HR and legal obligations).

http://www.charity-commission.gov.uk/library/about_us/ccnews29check.pdf

2.3 Demonstrating impact and value

Ambitions and Challenges of SROI (Social Return on Investment)

Dr Malin Arvidson et al for the Third Sector Research Centre (2010)

Examines some of the technical and methodological issues involved in using SROI techniques; may be overly academic but could be of use to those who are trying to understand some of the broader implications of SROI as a means of evidencing impact.

<http://www.tsrc.ac.uk/LinkClick.aspx?fileticket=QwHhaC%2br88Y%3d&tabid=762>

Assessing Change

Diana Parkinson and Avan Wadia for Charities Evaluation Services (2010)

A practical handbook to help you identify and develop ways to collect information on the outcomes of your work. It takes the reader through the process of deciding whether to design your own monitoring tools or to use one of the many tools that are already available.

<http://www.ces-vol.org.uk/index.cfm?format=748>

Impact

NCVO (n.d)

Collection of articles about how to think about, plan, deliver, assess and market impact.

<http://www.ncvo-vol.org.uk/strategy-impact/impact>

Impact Briefing: Putting Impact at the heart of the tendering process

ACEVO, NEF & Development Trust Association for Finance Hub (2008)

Brief outline of how to undertake social accounting and recording the outcomes and wider impact of work. The briefing provides examples of how to do this in practice and signposts resources for progressing this activity.

http://www.financehub.org.uk/uploads/documents/Impact_Briefing_final_185.pdf

Making a difference together? Planning, monitoring and evaluating voluntary and community sector collaborative working

Peter Williams, Charities Evaluation Services (2010)

A key issue for many VCO later life organisations in the future will be forming partnerships with similar organisations to deliver public services. But how to evaluate whether that collaboration would help you, and once partnerships are formed whether that collaboration is working? This guide covers those very issues.

<http://www.ces-vol.org.uk/downloads/makingadifferencetogether-764-772.pdf>

Monitoring and Evaluation on a Shoe String

CES (2011)

Easy to follow advice and practical tips about how to move from describing what you do – to describing the difference you make to people's lives.

<http://www.ces-vol.org.uk/index.cfm?format=803>

Outcome and Outcome Indicator Banks: Availability and Use

Avan Wadia and Diana Parkinson for Charities Evaluation Services (2011)

Introduces the idea of sharing outcomes/outcome indicators across VCOs doing similar work. This can help organisations doing similar work to create a 'common language' to describe impact and common approaches to measurement and can help projects to compare their work. Although in the early stages of development, there is potential for later life VCOs to explore this in particular localities.

<http://www.ces-vol.org.uk/downloads/outcomeandoutcomeindicatorbanks-786-794.pdf>

Social Enterprise for Public Service: How does the Third Sector Deliver?

Paul Hunter (ed.) for The Smith Institute (2009)

Collection of papers on a range of impact and social value measurement issues. Investigates issues as they relate to specific sectors – e.g. social housing, grassroots organisations etc.

<http://www.tsrc.ac.uk/LinkClick.aspx?fileticket=5MOUWQwqcLM%3d&tabid=523>

2.4 Marketing services

Achieve More: Performance Hub Magazine

NCVO (2007)

This issue of the Performance Hub magazine includes a good introduction to how to target and sell your services.

http://www.ncvo-vol.org.uk/sites/default/files/UploadedFiles/NCVO/Publications/Publications_Catalogue/Quality/AM7%20final.pdf

Developing a Successful Marketing Strategy

ACEVO (n.d)

Case study that shows how a Voluntary sector consortia was able to develop a marketing strategy that helped it to bid for and win public sector contracts

<http://www.acevo.org.uk/Document.Doc?id=373>

Marketing support

Media Trust (n.d)

24-minute video which gives practical advice on the basics of marketing for third sector organisations. It covers why new social media is vital to reach wider audiences

<http://resources.mediatrust.org/marketing-support/>

Marketing Your Social Enterprise

Social Enterprise London (n.d)

Specifically aimed at social enterprises, this guide offers an overview of what marketing is, why it should be considered as part of your organisational planning and how you can achieve maximum results for modest efforts.

<http://www.sel.org.uk/uploads/Marketing-Your-Social-Enterprise.pdf>

Promoting Your Enterprise

Birmingham & Solihull Social Economy Consortium (2007)

A six-part resource pack providing a full introduction to marketing for newer social enterprises and trading voluntary organisations:

Part 1 – Getting started

Part 2 – Defining your market
Part 3 – Writing press releases
Part 4 – Creating leaflets and brochures
Part 5 – Producing a newsletter
Part 6 – Creating website content

<http://www.bssec.org.uk/pye.html>

Starting a Business – The No Nonsense Guide: Module 4: Finding and keeping customers

Business Link (n.d)

Section 4.5 in particular offers some basic guidance on how to think about your 'marketing mix' – the 4 P's of product, price, place and promotion.

[http://online.businesslink.gov.uk/Horizontal_Services_files/Starting up Module 4.pdf](http://online.businesslink.gov.uk/Horizontal_Services_files/Starting_up_Module_4.pdf)

More step-by-step and detailed guidance from Business Link on creating a marketing strategy here:

<http://www.businesslink.gov.uk/bdotg/action/layer?r.i=1074460208&r.l1=1074404796&r.l2=1074446322&r.l3=1074457193&r.t=RESOURCES&topicId=1073900352>

2.5 Forming relationships with funders

Contact details for GP consortia pathfinders in the West Midlands

<http://westmidlands.nhs.uk/WhatWeDo/GPPathfinderConsortia.aspx>

Getting Round the Table: A guide to realising new opportunities and finding local solutions to national problems by brokering relationships with commissioners in order to ensure the delivery of public services by the third sector

ACEVO (2010)

Helps you to organise and deliver 'commissioning round tables' in your local area. Gives tips on how to engage commissioners and discuss issues that are important to your organisations. Includes step-by-step guide through how to prepare key questions and arguments to be discussed with commissioners.

<http://www.acevo.org.uk/Document.Doc?id=546>

Meet the Changemakers: Expert tips for effective engagement

ACEVO (2010)

Advice from key leaders in third sector about how to get your point across and influence important decision makers.

<http://www.acevo.org.uk/Document.Doc?id=565>

2.6 Diversifying services

Sustainable funding project

NCVO (n.d)

NCVO's sustainable funding project offers some basic guidance around different streams of income available, how to manage and plan finances and how to weigh up the pros and cons of different approaches to income generation. Includes real life examples of sustainable funding in practice (e.g. organisations that have decided to focus on trading and earning income) – see last link.

<http://www.ncvo-vol.org.uk/advice-support/funding-finance/sustainable-funding>

<http://www.ncvo-vol.org.uk/advice-support/coping-with-cuts/future-financial-stability>

<http://www.ncvo-vol.org.uk/sfp/inpractice>

2.7 Moving from funding to selling

Future Focus: What will membership be like in 5 years' time?

NCVO (2010)

Guide to consider key issues that will affect 'membership' organisations over the next 5 years. Can organisations rely on membership? What steps do you need to be taking to ensure your membership services are relevant to your members?

http://www.ncvo-vol.org.uk/sites/default/files/FF8_0.pdf

The 'Handy Guide' to Tendering and Procurement

Tendering for Care (2009)

Basics around the legal requirements of tendering and procurement.

<http://www.tenderingforcare.com/system/files/HandyGuideTandP.pdf>

How to be successful and write a winning tender

ACEVO factsheet (n.d)

The issues you need to consider in writing a successful tender.

<http://www.acevo.org.uk/Document.Doc?id=398>

An introduction to commissioning and tendering and The Complete Dictionary of Commissioning and Procurement

ACEVO (n.d)

Discussion of 'full cost recover' less relevant in current political climate but still serves as a useful introduction. Includes some of the key language used in tendering and procurement processes, along with some of the practical things organisations will need to consider when responding to commissioning opportunities (e.g. cost and TUPE). The dictionary is more in depth.

<http://www.acevo.org.uk/Document.Doc?id=51>

<http://www.acevo.org.uk/Document.Doc?id=396>

Providers Guide to Procurement

SITRA (2008)

SITRA was established with partial funding from the Dept for Communities & Local Government in 2009/10 specifically to look at the actual and likely impact of personalisation on Supporting People funded services. This publication is aimed specifically at organisations delivering care and housing services.

http://www.sitra.org.uk/fileadmin/sitra_user/TEMP/A_Provider_s_Guide_to_Procurement_for_website.pdf

2.8 Case studies of where personalisation is working well

Creative ways to promote personalisation

Anabel Unity Sale, communitycare.co.uk website (2009)

Examples include a personalisation roadshow, social care TV and e-shopping for support.

<http://www.communitycare.co.uk/Articles/2009/04/28/111320/good-practice-creative-ways-to-promote-personalisation.htm>

Good Practice: Dimensions' journey to personalisation

Natalie Valios, communitycare.co.uk website (2010)

Article charts the development of a learning disability provider 'Dimensions' that decided to undertake an overhaul of its services to respond to personalisation. Outlines key learning points and good practice for other organisations thinking of doing the same.

<http://www.communitycare.co.uk/Articles/2010/04/30/114404/good-practice-dimensions-journey-to-personalisation.htm>

Ideal for All

<http://www.idealforall.co.uk/>

Good example of a charity that has re-shaped its offer to respond to personalisation. Organisation is run by and for disabled people in Sandwell providing social and health care services. Services provided by IFA include: occupational therapy, an information service, wheelchair fitting and rehabilitation, a fully equipped demonstration house with a range of assistive technologies for disabled people, membership and social events services and IT training. The organisation has used a Direct Payment Support Service (a Government initiative) to good effect. This is one vehicle by which disabled clients can administer their own care funds to secure the services they need at the times they need. For many this is a route to greater flexibility, independence and dignity.

Impact of personal budgets on third sector providers of social care

ESRC, ACEVO (2010)

Article that includes useful coverage of what other VCOs think the risks and opportunities of personalisation are likely to be. Does not include 'guidance' but is a useful background paper to consider how others are feeling about the agenda.

http://www.esrc.ac.uk/images/personal_budgets_tcm8-2414.pdf

Personalisation briefing

Social Care Institute for Excellence (2009)

Does not necessarily reflect recent changes in health and social care policy. Yet offers a useful introduction to personalisation and suggests a number of key issues VCOs should be considering to 'shape up' for personalisation.

<http://www.scie.org.uk/publications/ataglance/ataglance13.asp>

2.9 Negotiating and Shaping Public Service Contracts

A bridge between two worlds

NAVCA (2010)

A collection of real life examples where VCOs have worked with public authorities to shape and improve local commissioning processes and strategies. Includes suggestions and tips on how to 'sell' ideas to commissioners.

<http://www.navca.org.uk/publications/bridgebetween>

Negotiation Briefing: Effective Negotiation to secure better outcomes

Development Trust Association & ACEVO for the Finance Hub (2008)

This briefing is useful for those that are new to negotiating and those that could do with a refresher. It identifies different strategies to negotiate with different stakeholders. Negotiation scenarios are not tied to any particular type of service, so can easily be applied to context of later life VCOs.

http://www.financehub.org.uk/uploads/documents/FH12_3_Negotiation_Briefing_appendix_3d_186.pdf

2.10 Future thinking: working with boards and beneficiaries to develop new strategies for your organisation

In Focus: Making sense of the external environment

NCVO (n.d)

Developing a new strategy is likely to involve some sort of 'horizon scanning'. You may want to use exercises with your board to think through changes in the wider world and how they will affect your organisation. This short document offers a number of exercises like this.

http://www.ncvo-vol.org.uk/sites/default/files/In_Focus_external_environment_final.pdf60

ABOUT US

This report was produced by brap for Regional Action West Midlands.

About RAWM

RAWM exists to enable a sustainable, influential, effective and inclusive voluntary and community sector in the West Midlands area.

About brap

brap is a think fair tank, inspiring and leading change to make public, private, and community sector organisations fit for the needs of a more diverse society. brap offers tailored, progressive, and common sense approaches to equality training, consultancy, and community engagement issues.

This report has been produced as part of RAWM's Sustaining Influence and Change project. Sustaining Influence and Change has provided support to a number of voluntary and community sector policy groups and has increased the impact of their work and helped to strengthen relationships with decision-makers in the West Midlands. The report is the result of close collaboration between RAWM and the West Midlands Later Life Forum.

For more information about RAWM please visit www.rawm.org.uk.

