

Dame Mary Marsh Review of Skills & Leadership in the VCSE Sector

May 2013

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Welcome & Overview – Dame Mary Marsh

This forward-thinking review was set up to examine the social sector's most vital needs around attracting and developing a skilled workforce and leadership. This response presents the critical skills gaps that have been identified, grouped into eight themed areas. These key themes emerged through our open consultation undertaken and tested with a range of representatives from a diversity of organisations across the sector. The purpose of all this activity is of course to secure improved social action across the sector and so better and more sustainable outcomes for our beneficiaries.

The detailed response is organised in these themed areas:-

1. Strengthen governance
2. Attract and develop leaders
3. Routes into and through the social sector
4. Skills sharing
5. Digital fluency
6. Data-informed social change
7. Enterprise capability
8. Collaboration in the social sector

Members of the review working group focused on particular themes and jointly supported the presentation of the detail in these themed responses. The emerging findings were shared more widely and finalised after a consultation with a diverse group of critical friends. There are issues raised here that are not new but there is clear recognition that they are increasingly critical and need action now.

Some of the issues are shared with the public and private sectors, particularly amongst SMEs. A recognition of the need to also think of social sector organisations in many interventions to support SMEs was a recurring point.

In navigating the Review it proved easier to engage in analysis of needs and gaps in skills than to find effective solutions that could work at scale. There are many examples of good practice but not all can easily have direct relevance beyond their locality and the particular people involved. We need to get smarter at learning from each other, adapting and replicating rather than always looking for big solutions.

We confronted the challenge of the enormous diversity of the social 'sector' itself in terms of size, purpose, legal form and scale of reach. We used the unifying commitment to social action as a shared focus while we recognised that many issues and responses to them need to be radically differentiated to be relevant in different parts of the sector.

It should be noted that this was intended to be a focused identification of the particular skills and leadership needs that are potentially holding back charities, community

organisations and social enterprises from the progress so urgently needed now and in the near future. It presents a partial picture of the issues, emphasising where it is most critical that everyone working to improve social action outcomes needs to engage now.

This is also a work in progress that will need active implementation in the following months if we are to secure the dynamic change and improvements in skills and leadership we have recommended and which are so urgently needed. We have gathered support for significant contributions to progressing and delivering the strategic implementation phase that must follow this review.

Overarching themes

There are three overarching themes that have become clear from all our discussions, consultations and consideration of the evidence. These issues are not exclusive to the social sector. Similar issues have emerged in reviews of other parts of the economy such as the Heseltine report October 2012.

First, we recognised that **everyone has an individual personal responsibility to actively contribute to our own continuous development**. There are so many opportunities to provide peer to peer support and learn from each other. We can all use and create networks for sharing experience, skills and safe spaces for reflection. Online resources present a whole new world of learning opportunities, much of it increasingly open and free. Of course employers, the wider sector and sources of funding can help in this but there is much we can do for ourselves.

Secondly, the **responsibility for developing and 'growing' people and making the most of potential has to be led from the top of organisations of all sizes including by their governance**. This leadership should be both a role model in this, leading by example and actively prioritising a developmental approach throughout the organisation including of course for volunteers as well as paid staff. But to do this effectively we need to be ready to robust in how we manage people, balancing development, coaching and support with a clear expectation of delivery and performance. Some difficult and honest conversations can be highly productive if they support constructive reflection and action.

Thirdly, there are **some urgent specific skills gaps many of which come from recent radical shifts in opportunity and the changed financial context**. They are often shared with private sector SMEs. These include the mostly intergenerational gap in digital fluency, the lack of skilled data driven approaches and a lack of enterprise capability. Some of these could be addressed through better skills sharing, both within and across sectors. We recognised the need for more people who are at ease in 'boundary hopping' between different contexts and sectors which could be encouraged by more openness and recognition of the value of progression routes that are cross sector in all directions as well as by effective collaboration.

The Recommendations of the review challenge us all with some clear recognition of the particular contribution that can be made by each of us individually as well as by funders, commissioners, sector leaders, policy makers and Government. The Resources we have identified provide a wealth of sources of advice, example, practical tools and direct places for action. This is a crucial opportunity that is open to us all. We must seize it.

Acknowledgments

Many people have contributed to the review in a whole range of ways, both online and in person. We have engaged directly in personal meetings and small group events with representatives of over 60 organisations and umbrella bodies. I am grateful to them all for their engagement, challenge and considered contributions. My particular thanks go to the members of the review working group, and those who joined us, who gave generously of their time, expertise and wider connections.

We set out to develop this short review by engaging with the sector and other stakeholders using a different approach including an online discussion forum open to all and more participatory consultation events. We found this to be productive and a particularly beneficial approach in such a short six months review. As a first attempt there is much to learn from our experience of doing this and our view of what we would recommend others considering using a similar approach in future. My thanks to all in the Cabinet Office who supported us through this review, including allowing us to try out this different approach.

Theme 1 - Strengthen Governance

Governance of organisations in the sector sits at the heart of our operations, leading the social sector in the interests of the beneficiaries that we seek to help and support – when an organisation is well governed the results can be extremely powerful.

And yet, many would argue that whilst the way social sector organisations are managed has seen a sea change over the past few decades, the way they are governed has not. **In many organisations a similar step-change to update and improve their governance could bring about huge improvements in the relevance and quality of the sector’s delivery to its beneficiaries.** Too often, boards in the sector lack the skills that they need in this day and age and too often, they can struggle to meet good practice. **Furthermore, boards in the sector are nowhere near as diverse as they could and should be**, a lack of diversity that can lead to narrow thinking and that presents barriers to being able to most effectively represent the diversity of the beneficiaries that they seek to serve.

That is not for want of describing what good governance looks like. Most prominently, the Code of Good Governance (developed in 2005 by ACEVO, the Institute of Chartered Secretaries and Administrators (ICSA), NCVO, and the Small Charities Coalition, working with the Charity Commission) describes how an effective board operates effectively. The Code sets out 6 principles: “An effective board will provide good governance and leadership by:

1. understanding their role
2. ensuring delivery of organisational purpose
3. working effectively both as individuals and a team
4. exercising effective control
5. behaving with integrity
6. being open and accountable.”

Nor do we believe there to be a lack of resources available to help organisations improve their governance. Umbrella bodies, government, the Charity Commission and others have invested considerable time and money in making resources available. ACEVO, for instance, has produced a range of guides for chief executives on how to work with their boards; and runs a range of services to help organisations improve their governance e.g. board reviews (<http://www.acevo.org.uk/Governance>) . NCVO similarly offers a range of support (<http://www.ncvo-vol.org.uk/advice-support/trustee-governance>). A number of recruiters and specialist organisations also exist specifically to help voluntary organisations find trustees. Funders clearly appreciate good governance and the difference this can make to delivering effective and efficient outcomes but they do not all regularly seek to challenge and support Boards to improve. There is much debate within the sector as to what does lie behind the

common issues that inhibit good governance, and what can be done about them. Some of these debates (e.g. on paying trustees) are highly controversial. We have not sought to wade into all the aspects of these debates, but do want to make one contribution to them here.

Our conclusion was that **the key problem is that many organisations in the sector are unwilling to invest in a significant way in their boards** (whether that be recruiting new and more diverse trustees, training/inducting trustees, carrying out board performance reviews or individual appraisals). As a result of this, tools/support in this area are often free, or relatively inexpensive, and sometimes limited as a result. Demand for support ‘upskilling’ or recruiting to boards is relatively weak, and supply reflects that. There are examples of brilliance, including using agencies in Trustee recruitment, but the funds to roll it out across the sector rarely exist.

We do not believe that the answer is a top-down, Government-funded capacity-building programme, given the state of the public finances and the limitations of such an approach as experienced through previous programmes. **We believe instead that there is strong a case for ‘nudging’ charities, social enterprises and community organisations to invest more in their boards** and that promoting and employing some simple and reasonable cost methods should make this achievable. All this can be reinforced with the Code of Governance and its clear expectations.

Recommendations

To nudge organisations in the sector to invest more in their boards, and to make use of the wide range of guidance, tools and services already available, we recommend:

SR 1.1 - An 'Investors in Governance' kitemark should be developed, to be awarded to organisations that systematically invest in ensuring that they are well governed. An ‘Investors in Governance’ kitemark, if it delivered clear value to VCSE organisations and was recognised as a useful indicator by prospective trustees, funders and others, might nudge VCSE organisations towards investing more in improving the quality of their governance, and in recruiting a more diverse group of trustees. We are pleased that the ACEVO Commission on Governance (<http://www.acevo.org.uk/governance-commission-2012>) have agreed to explore this idea further, working closely with the steering group for the Code of Good Governance (<http://www.ncvo-vol.org.uk/codeofgovernance>). We believe that work needs to include looking at how such a kitemark could be made effective, inexpensive and desirable for the sector.

SR 1.2 - Funders and auditors should look more closely at the quality of governance in the organisations they fund/audit. They could consider, for instance, looking at whether board performance is regularly appraised, whether an organisation is signed up to the Code of

Governance or whether the organisation has achieved the Investors in Governance kitemark proposed above. Rather than simply attempting to use these as scoring criteria in an assessment mechanism Funders are well-placed to use their unique insight into applicant organisations to consider building complementary support for the betterment of key organisational qualities such as governance into their overall package of support offered to the applicants that they choose to support.

SR 1.3 - Infrastructure organisations and Funders should collaborate to improve existing peer support mechanisms for trustees / directors – these could be improved and better promoted through existing networks to increase knowledge exchange and support between existing trustees. They could also act as potential brokers for trustee rotation and swapping to improve turnover. We are pleased to see that plans are afoot to create an Institute for Chairs, and believe Government and funders should support the development.

SR 1.4 - The Charity Commission should review the information/guidance it makes available to new trustees, both in terms of its content and how it is communicated to trustees, so that that widely disseminated and well targeted information/guidance can act as a spur to board members continually investing in their skills.

SR 1.5 - Funders and umbrella bodies in the sector should continue to support Trustees' Week, through investment and involvement as an opportunity to raise the profile of trusteeship amongst the public. In future the organisations involved should engage more with private sector employers to help them see how trusteeship can help develop staff. It is also an opportunity for all Boards (including Foundations and Trusts and umbrella bodies) to celebrate the contribution of their own Board members. This will all help the public profile of Trustees' Week to continue to grow.

SR 1.6 - Government could amend the law to put trusteeship on a par with becoming a magistrate or school governor, to raise the profile of trusteeship and make it easier to access, thereby improving the supply of talented individuals onto boards in the sector. Many employers, but still far too few, already recognise both the development opportunity and the contribution to the community that being a Trustee provides. So specifically, if the Government amended the Employment Rights Act 1996 to extend employees' existing right to take reasonable time off for certain public duties (e.g. to serve as magistrates, councillors or on the governing bodies of schools) it could enable them to take reasonable time off, with the permission of their employers, to become a trustee in the social sector. We believe this would send a powerful message to people who could be trustees but would not otherwise consider it.

Theme 2 - Attract & Develop Leaders

Leadership at the heart of success in the social sector

We are all leaders of our own work and achievements. Some of us are leaders of organisations or projects and of teams. There is a great opportunity for all of us to achieve more for the causes that we believe in and which bring us to be active in the social sector, if we recognise the importance of developing our own leadership capability and invest in building our skills, confidence, drive, resilience and integrity.. We should take the opportunity to place leadership at the heart of the discussion about the wider public benefits of our work.

The quality of leadership is at the heart of success in the social sector. Not just at the pinnacle of achievement in the small number of large and well known charities and social enterprises, but across the million strong mass of social organisations from fully voluntary through micro to small and medium sized ventures. **This is not just at the level of directors and chief executives, but for aspiring and emerging leaders across all positions and for trustees and volunteers too.** A key part of the added value of social action organisations is that they are able to foster organic and sustainable leadership support and development within the context of their working practices.

Leadership is largely something we learn by doing it – and by reflecting on what went right and what went wrong, to cement the learning. We recommend a radical shift in the way we see leadership development in the social sector to mirror this understanding of how it works. **We advocate that we regard our leadership development as something we each own and something we all share.** We advocate a change in behaviour so that it becomes the norm for an established leader to mentor, coach or advise someone new, and the norm for aspiring leaders to have a mentor, coach or adviser and to share back their understanding of new ideas and the social and technological developments they have grown up with.

This is not a luxury or self-interest. We cannot advance our social mission without working on our own leadership capability. Sometimes it is seen as something we expect others to do for us or to us. It cannot be. Others can help, but no one can do it for us. It is critical in advance of, and during, points of transition in both leadership roles and changing context in which the social sector increasingly finds itself.

We set out some methods and actions to help make this happen. But we are very aware that it requires a cultural change, and is therefore **in the hands of all of us in the sector to make it happen.**

What sports, music and arts teach us.

Personal commitment to improve is at the core of sports, music and the arts. Starting from first steps in these fields, progress is determined far more by the dedication of individuals than by any other factor. More experienced people can offer skills and coach. Facilities provide opportunities to train. But only the individuals themselves can decide to put in the sheer hard work, the resilience and determination, to improve their abilities. The great majority of participants in these sectors learn from a combination of practice and coaching from more experienced participants, often given on a voluntary or shared learning basis. Just a tiny minority of the most able receive professional training, and even here the individual dedication is critical.

Our work in the social sector is so important, we are so passionate about it, and we could do far more if we honed our skills in a similar way.

Common issues arising in leadership development in the social sector

Who?

- There are some great people in the sector and great people who want to come into the sector. We should offer the culture and conditions within which they can grow to fulfil their potential as leaders at all levels. We too often give the impression that it is wrong and selfish to focus on personal leadership development, or that it is the job of employers to provide opportunities for this. **Both individuals and employers should be investing in leadership development and, by doing so, promoting the sector as a great place for talented individuals to thrive.**
- We tend to focus more on developing existing leaders and less on aspiring leaders. **Leadership is too often seen as something that happens at the end of a career, not throughout it.** This development should be clearly encouraged and recognised from a young age starting in schools, FE and HE
- Anecdotal evidence indicates that social action leaders tend to have longer careers with one organisation. There also appears to be a rapidly changing leadership environment as rapid socio-economic changes drive long serving sector leaders to retirement or out of the sector. We must be aware of the possibilities of skills drain and a growing leadership vacuum. This rapidly changing environment presents an opportunity **to foster new kinds of entrepreneurial leadership and to create a drive for the necessary expansion of diversity and skills that are needed.**

How?

- Developing leaders and potential leaders is often seen as too expensive. Many people are put off doing it because of cost. In reality, leadership is developed through experience, and cemented in place by reflective practice. Coaching, mentoring, some reflective down-time or work experience in other places can go a

long way. **Learning by doing and absorbing that learning through reflective practice is low cost and for many, the most effective route.**

- It's a two-way thing, if you want to be a leader you need to put the effort in as well as your organisation. **Organisations can and should help by setting a cultural tone and enabling environment.** But only you can develop your own leadership.
- We need to improve the use of our existing recruitment and governance structures to talk about, inspire and develop leaders. **Challenging our own governance practices and committing to internal succession planning are meaningful and immediate ways to create culture change.**
- Leadership can be identified and learned through processes and can happen at any level. There are many processes already in existence that foster leadership development and opportunities. We need to be more explicit in our identification and use of these

Gaps?

- This is not just a social sector issue – we have a deficit of effective leadership across the UK economy and a weak life-long learning culture in the UK that fosters this. **But we are here in the social sector because we are determined to tackle social challenges.** We must not tolerate this deficit; it is our job to make ourselves the strongest possible agents of change.
- Organisations can feel guilty about spending money or time on leadership development. Some jealously guard resource targeted at developing individuals for a longer-term purpose that may not be uniquely within that organisation. All of us are collectively better off, including our beneficiaries, if we avoid this narrow thinking.

Different Approaches

- Effective, low-cost leadership development options are not easy for organisations to find. There are a small number of excellent but higher cost programmes, and a large number of other schemes where quality may be hard to judge. Mentoring, coaching and action learning are seen as the preserve of qualified and experienced professionals rather than as skills many of us can learn.
- Leadership development is often confused with management training. Managerial skills are often needed by leaders, but the two areas are quite different. Most importantly, we are all leaders of our own work and of our own career journeys – not just those of us in management roles or aspiring to them.

- We must be brave and identify non-traditional leaders and create new pathways to leadership development.

Leaders grow leaders

- Effective, leaders with public profile in their organisations and the sector can add huge value and inspiration if they are willing to act as collaborative and confident role-models for aspiring leaders.
- New, aspiring leaders can add huge value to their more established colleagues by sharing their understanding of the social and technological changes which they have grown up with.
- Co-mentoring – in the broad sense – can be a highly effective and cost effective mechanism to improve the leadership of both aspiring and established leaders.
- Improving the quality of line management conversations would strengthen development and performance

Recommendations

SR 2.1 Everyone in any line management or peer support role needs basic training in coaching and mentoring skills. The focus on this should be sponsored and supported by Chairs of Boards and chief executives. This will strengthen the development all leaders' capability as a potential mentor for aspiring leaders. We need a change in behaviour so that it becomes the norm for an established leader to mentor, coach or advise someone new, and the norm for aspiring leaders to have a mentor, coach or adviser and to share back their understanding of new ideas and the social and technological developments they have grown up with. While professional coaches and mentors will continue to play an important part in this, all leaders should contribute. High profile leaders should show the way by stepping forward as mentors and coaches. Leaders must lead this activity and set the example.

SR 2.2 Funders of organisations and activity in the sector need to ensure that leadership capacity is an explicit part of their discussions when considering investments Following the great example of some innovative funders, the funding criteria and investment offer should support leadership development particularly where this is clearly an immediate or potential issue. This support should be tailored to the particular circumstances and could range from skills sharing (see Theme 4) or mentoring/coaching (as in SR 2.1) through to specific leadership development programmes including supporting leadership pathways as in SR2.3 using the resources identified as in SR2.4..

SR 2.3 Build on the development of routes into and through the sector (Theme 3) to identify and support leadership pathways and the journeys of aspiring leaders through them

Leadership is learnt at every stage of the journey through the sector from young leaders (eg Dare2Lead, Uprising, Leap) through to aspiring and emerging leaders. Employers, funders and individuals themselves should encourage, help to develop and enable the take up of opportunities for leadership development and reflective learning through peer support, mentoring, coaching and action learning. At the right stage, opportunities should be made for access to more in depth development programmes, as is common for the identified 'talent pool' in the public and private sectors, (eg ACEVO, SSE - School for Social Entrepreneurs, NAVCA, NCVO, Common Purpose, Leadership Trust, Windsor Leadership Trust, Clore Social Leadership Programme)

SR 2.4 Sector lead bodies and influencers should demonstrate and articulate what good leadership means in the sector This can be through profiling good case studies of sector leaders in order to build a cultural norm for peer support, mentoring and leadership development in the sector. **They should pull together existing / creating and promoting the tools, mechanisms and incentives to make this happen** with passion, energy, effectiveness and pace. This could be a national "Wikipedia" style site " of good practice, tips, tools, bibliography and sign posting, ideally linked to an existing platform, such as Know-How Non-Profit and/or STS Skills Platform. After initial set up, there could be sponsorship by cross sector large organisations from VCS, social enterprise, commercial and academic who simply commit and organisations could contribute by encouraging staff to give time to adding copy and editing it. Existing national bodies should be encouraged to have stakeholders share via these networks and free web resource by offering free time off work or small amounts of internal expertise could drive major awareness raising, as well as increase the availability of good practice resources.

Additional recommendation

AR 2.1 An aspiration for a network of leadership development

- Overall for everyone in and connected with the social sector we believe there needs to be a culture change in leadership development. We need to regard **our leadership development as something we each own and something we all share**, inculcating the belief and confidence that your leadership journey is in your hands and that it is vital to achieving your social mission. We can all contribute to support to others on their leadership journeys as supporters and mentors sharing our own experience and learning.
- Leaders and organisations need to recognise that **networking may be the most powerful tool for creating pathways of self-awareness and leadership development**. Agreement to encourage more networking, more often in more diverse environments may be the most efficient and powerful tool to the creation of the necessary cultural change particularly at the resource poor locality level.

- An idea for leaders to consider is to develop and promote an individual and organisational pledge to **encourage and promote a personally directed, shared benefit, networked learning approach**. It is recognised that different contexts require different responses eg scale and size of each organisation. (see proposed example in Resources section)

Resources/case studies

A proposed framework for commitment to leadership

An individual pledge for people in the social sector to sign up to

I will:

1. Model good leadership behaviours
2. Nurture good leadership in others
3. Take personal responsibility and accountability for my leadership journey
4. Support other leaders through mentoring and networking
5. Share information, resources and experiences to help others in their learning

Illustrate this pledge with examples, options, and personal stories, e.g.

1. Mentoring/co -mentoring
2. Organising a local network
3. Blogging your experiences
4. Challenging poor leadership practice / behaviours
5. Participating in exchanges
6. Sharing your learning in informal ways (e.g. mind melds, brown bag lunches) [

Possibly add an organisational pledge, and exemplify organisational good practice

- A commitment to a personally directed, shared benefit, networked learning approach to leadership development in the sector is a major cultural development challenge.
- We believe the individual pledge, underpinned by examples of ways to honour it, and use of platforms to communicate, and is the most likely route to mass engagement.
- Organisations need to align their work to provide fertile ground for this activity.
- An organisational pledge would run the risk of becoming a tick box exercise. This can be prevented if there is substantial pressure from individuals in the sector for this better approach.

A suggestion for funders

Consider creating a virtual “social leadership foundation” comprising people with leadership knowledge and/or experience from the charitable, social enterprise, commercial and academic sectors, recognised as an honour to become a member and providing inspiration to others. This might be independent of linked with an existing body.

A virtual leadership foundation

A network of leaders and leadership development experts committed to improving leadership in the social sector.

A body based on a shared economy: voluntary, influential, providing benefits of prestige and connection, and taking the best of expertise in the sector.

Practical actions for the foundation:

Local networks for social leaders

Editing a wiki of leadership development ideas and narratives

Hosting an annual conference on leadership in the sector,

Providing mentoring services and knowhow on mentoring

Advising government on education and information provision,

Providing regular blogs and commentary on leadership to create an active web based resource.

Case studies of good practice

Third Sector Research Centre has identified the importance of effective narrative at a number of levels: firstly, through underlining the importance of good illustrative narrative in setting out the impact of the work of third sector organisations and activities and secondly, through expounding the importance of a robust strategic narrative to provide national umbrella agencies with a strong sense of direction and a secure platform from which to build alliances with government and other stakeholders and strategic partners. They conclude with a call for a leadership narrative that embraces a more open and vigorous conversation about the role and future of the sector, and the potential for developing a big narrative for the third sector and civil society.

Third sector leadership: the power of narrative

Dr Rob Macmillan and Vic McLaren

Working Paper 76 March 2012

Sharing experience via personal journeys or inspiring case studies is a skill the sector already possesses. A re- direction of those skills to tell the necessary leadership story can help

showcase their existing good practice as well but help raise the profile on the need to share information and impact. It will also profoundly impact the heightened awareness needed to encourage potential leaders to engage as well as current leaders to invest in their leadership.

- The largest traditional third sector support organisations (ACEVO, NAVCA, NCVO, et al) tend to offer both web based information and support programmes. These traditional programmes tend to provide merged management and leadership support, the development of new chief executives and the support of traditional management skills. They may often be delivered in conjunction with commercial partners. In addition the less formal programmes may often have action learning sets as a popular tool, and the strength of creating pathways to peer support

Emerging Leaders Programme: <http://www.acevo.org.uk/emergingleaders>

Inspiring Leaders Programme: <http://www.acevo.org.uk/InspiringLeaders>

Accelerating Leadership Programme: <http://www.acevo.org.uk/accelerate>

One Day MBA (including information on stand alone 360degree reviews):

<http://www.acevo.org.uk/page.aspx?pid=2326>

Leadership Publications

http://www.acevo.org.uk/leadingtheceoandchair?&nccsm=15&_nccscid=22&_nccsct=Leadership+Development

- Some bespoke leadership programmes such as NAVCA'S *Inspiring Local Leadership* are beginning to emerge.
- The social enterprise or social value sector has support for emerging entrepreneurs and start-up businesses that tend to be very strong on strategic development and traditional business skill support. Some supply good support to look at leadership qualities and promote self awareness.
- Aspiring leaders in the social sector can apply be appointed as a Clore Social Fellow and benefit from a fully funded individualised leadership development programme and progress to be part of a growing Fellowship of active leaders engaged in a wide diversity of contexts.
Clore Social Leadership Programme www.cloresocialleadership.org.uk
- Academic programmes can offer a huge resource in terms of expanded knowledge, best practice, and the time to self-reflect. They tend to be expensive both in terms of financial and time costs. Many of these are targeted to more experienced leaders or senior managers.
- There are also a plethora of sector specific models that may hold pieces of good practice and tools, such as the Kings Fund health leaders support programmes and local government leadership programmes for councillors etc.
- Overall there is no lack of good to excellent formal leadership programmes via large support organisations and traditional academic routes. However in general these

tend to have limited places, be more expensive than a traditional sector SME may feel they can spend. Many of these programmes may have a deficit in terms of developing the leadership prerequisites of self-awareness and emotional intelligence. They may be more likely to be accessed by leaders who are already self-aware enough to seek support and who want more sophisticated resource. They are not as likely to target emerging leaders, young people, grass roots community leaders or minorities.

- The review of resources that are available for informational or signposting purposes shows marked variation in quality and highlights the aggregate problem with management and leadership being inexorably linked in a way that does not raise the profile on actual leadership skills and development. In addition there is very little signposting information or advice for organisations on how to develop internal leadership or become a leadership organisation
- Tools and tips for leaders on the most well-known sector websites are usually linked to strategic information or commercial support offers. They almost without exception require membership (paid) to access the information. This is an area where social value support organisations often offer better free resource.
- It is clear that there is a lack of pathway awareness raising programmes and information that can lead to youth leadership development, as well as a lack of high profile women and minority awareness raising programmes
- There is also a lack of signposting and programme development with regards to cross sector leadership development and the use of cross sector shadowing or secondments to broaden understanding, knowledge and leadership efficacy.

Theme 3 – Routes into and through the social sector

When talking about skills in the social sector it is perhaps inevitable that **talent attraction and retention** should be central concerns, as they are throughout the UK economy. **How to recruit the capable people with a mindset to learn, and how to develop and retain them, is a challenge in organisations of all types and sizes.**

Where will the next leaders of the social sector come from? What experiences will they have by way of development and how will that impact on their outlook and decisions? What can we do to ensure that people capable of leading organisations confronting huge social problems find their way into the sector in the first place, and then are motivated and encouraged to stay there long enough to make a difference? **How can the sector actively attract and recruit more young people, not just graduates but also school leavers?**

Our conversations during the past few months as part of this Review have confirmed two things.

- Firstly, there is a belief that the sector is a wonderful place to work and it deserves to be **promoted as a career of choice to ambitious, talented people.**
- Secondly, a conviction that **if the social sector is made accessible, fertile ground in which to develop a career,** then we stand to see a step change in terms of how the sector is perceived, how it performs, and how it competes.

Here we have outlined what we believe to be the underpinning issues that need addressing in order to respond to this: entry into the sector, unclear pathways, introspection, and not being limited by 'the sector'. Further to that, we include some of the resources that already exist that could contribute towards a solution, together with recommendations for change at both an operational and strategic level.

Common Issues Arising in Entry to work in the Social Sector

1. Getting a Foot in the Door is Hard

- **Getting a foot in the door of the sector can be tremendously hard**, especially for those candidates who cannot afford internships, years abroad or who do not immediately stand out from the crowd with first class qualifications. Even if employers are interested in hiring for attitude and potential and training for skills, practice suggests that even when this is demonstrated at interview stage, getting beyond first stage application still requires a level of experience for entry level jobs.
- This is partly because **the sector lacks clear starting or entry points**. For prospective managers there are insufficient first roles with developmental prospects. For young people leaving school at 16 or 19 the sector lacks a strategic approach to creating Apprenticeships; and recruitment to those entry level roles/traineeships that do exist places a false value on experience and ends up recruiting people who are over-qualified for their role.
- The sector recruits less school leavers at both 16 and 19 proportionately than do either the public or private sectors. (UKCES National Employer Skills Survey 2011).
- As a sector, or as communities of employers operating in the same delivery sectors, we don't tend to come together and recruit strategically. **We lack a coherent, integrated and compelling message and promotion activities centred on a narrative about values that target people who may be interested in our sector(s) as a career of choice.**
- As a sector of employers **we tend not to target specific demographic groups** to address strategic talent and skills gaps. There are few examples of where the sector or employers tailor their recruitment practices to appeal to specific groups such as young people, gender or BAME communities.
- Some of us would also argue that **we place too much value in experience over attitude, competence and potential**. Too often our recruitment methods require experience levels that are off putting at best and at times excluding for young people early in their working life, especially those from diverse backgrounds. Moreover it appears that the position is getting worse, with the increased emphasis on project and contract funding increasing a tendency for employers to look to bring in short term experienced project managers who can make an immediate impact on delivering against project outcomes, rather than investing in the longer term development and potential of existing staff or young people.

2. Career Pathways are Unclear

- While we talk openly about the sector as a challenging and stimulating place to work, as a sector we **struggle to articulate clear career pathways or routes through the sector**. We never explain how ‘if you start here you could end up here in x number of years’, or ‘if you want to be x in y number of years these are the things to think about now’.
- Career routes in the sector are legitimately not always linear but need to be better understood in order to articulate options and prospects
- If we want to be seen as a career of choice we need to be able to articulate the career opportunities and journeys in our sector to people with ambition.

There seems to be **a reluctance to invest in employees who are seen as future managers**, anecdotal evidence suggests this is connected to a view that individuals may leave the organisation to seek new opportunities. This exposes the sector to an over-dependence on imported managerial talent or a reliance upon existing staff not necessarily suited to new challenges Non-profit sector employers rarely provide development opportunities aimed at future managers (76% of organisations stated that they trained managers, but only 17% trained elementary *NCVO Almanac 2012*)

3. It feels hard to connect beyond our own organisations

- Once working inside a non-profit organisation colleagues, and especially middle managers, are often so absorbed in the day to day running of the organisation that finding the time to look beyond their job and **connecting more widely across the sector is often difficult**.

4. Is it time to think beyond the “sector”?

- Organisations do not always recognise that people engaging in social action are increasingly seeking to do this from where they already are. You **do not need to work for a registered charity to do social good**, you can use other networks to achieve outcomes and more frequently it is possible for people to leverage social action from where they already work. Many people in businesses look to use that business as a platform from which to undertake socially motivated work. Non-profit organisations need to think beyond their own organisations and about how they connect with people in diverse settings to ensure social change happens. If this doesn't happen we will limit innovation and our ability to progress mission and vision and **the potential for more diverse entry points into social sector based employment**.

Practical information and support for individuals and organisations looking to assess themselves and/or deal with the issues raised above:

For Line Managers, HR and umbrella bodies-

Tips and practical suggestions for Non-Profit organisations to create entry routes into and across the sector:

- PS 3.1** Review existing recruitment practices and identify roles that could be redesigned to **create roles for trainees, apprenticeships and graduates**.
- PS 3.2** Encourage managers at all levels to consider where a **trainee/apprentice/graduate might fit into their team**, this should not be confined to Human Resources, supporting all with at least living wage
- PS 3.3** Rethink the value we place on experience and ‘commitment to the cause’, and consider what would be gained by **hiring for attitude and potential, training for skills**.
- PS 3.4** Non-profit recruiters should consider value in developing relationships with university volunteering and career advisory services and the equivalent services in schools and colleges. Individuals working in the sector with career ambition to lead should **map their networks** and monitor how they change year to year, discussing these changes with line managers.
- PS 3.5** Create an expectation for **staff to engage in at least one cross sector network** through Supervision & Appraisal objectives.
- PS 3.6** Actively use **Trusteeship in other organisations** as valuable opportunity to develop talent and emerging leaders whilst benefitting other organisations through external experience
- PS 3.7** Promote **internal and external networks for staff** and especially managers through organisational intranet (see LinkedIn group networks for examples).
- PS 3.8** Make **exploring individual career ambitions** part of the supervision & appraisal processes.
- PS 3.9** Encourage managers to **proactively reflect on and share their own career stories**
- PS 3.10** Encourage colleagues to **talk about their careers and development journeys**.
- PS 3.11** **Sector wide umbrella bodies should promote career pathways into and across the sector, as well as opportunities to connect across the sector.**
- PS 3.12** **Exit interviews** should signpost individuals to sector-relevant networks.
- PS 3.13** Non-profit employers to make **cross-sector networking skills** an essential criterion within all jobs on a management career pathway.

Strategic Recommendations

For Umbrella bodies, sub sector alliances, employers, funders, Government

- SR 3.1** Implement a **national graduate development programme** and establish a TeachFirst equivalent for the non-profit sector. Organisational Lead: Charityworks, Cabinet Office.
- SR 3.2** For individual **employers that cannot support a ‘trainee’ or development placement alone, consider grouping to facilitate graduate/other entrants** on structured schemes. Groups of employers/alliances eg disability, mental health. Organisational lead: Small Charities Coalition, NAVCA, SEUK
- SR 3.3** Encourage **employers to actively consider collaborating to create development opportunities for their staff that they could not easily secure independently** e.g. shared procurement of training; mentoring across organisations; developmental secondments across and between employers. Organisational Lead: Skills - Third Sector
- SR 3.4** Consider how strategically **to develop more entry routes for 16 to 19 year olds, including Apprenticeships and Traineeships**. Organisational lead: Skills – Third Sector, Fair Train, BIS

Additional Recommendations

For Umbrella bodies, sub sector alliances, employers, funders

- AR 3.1** Work to connect all offers targeted at particular talent pools, such as young people, so that they can combine resources to promote and handle interest. (Clear messaging, social sector / values based employer brand) Working Group comprising: Vinspired, Good People, Charityworks, The Princes Trust, Uprising
- AR 3.2** Consider value of and methods to resource a social sector recruitment advice resource for organisations needing to improve recruitment practices and individuals seeking values based careers. Organisational lead: ACEVO
- AR 3.3** Establish sector benchmarks for % of workforce that should be in specific career development structures (Trainees, apprentices, graduate programmes) and facilitate networks for them. Use these networks to facilitate an understanding of best practice. Organisational lead: NCVO, NAVCA
- AR 3.4** Support employers and networks to consider, develop and articulate development journeys in the sector so that interested talent can clearly see opportunities that are on offer. Make it as easy as possible for people working within the non profit sector to see what is available in terms of career development – consider the best platform and methods for doing this. Organisational Lead: Skills – Third Sector & NAVCA
- AR 3.5** Leaders of initiatives that develop talent in the sector should work together to align offers so that people can move from one to the other over the course of their careers and minimise the risk of dormant talent. Organisational lead: NCVO
- AR 3.6** Expand and resource existing research work to capture data on the number of entry level and second move jobs in the sector. Organisational Lead: NCVO, Skills-Third Sector, TSRC
- AR 3.7** Support initiatives that can connect to create an emerging leaders network. Organisational Lead: Clore Social Leadership Programme, Charityworks, On Purpose, UpRising.

Resources & Existing Programmes

1. ENTRY ROUTES FOR YOUNG PEOPLE

Apprenticeships

The National Apprenticeship Service (NAS)

[http:// www.apprenticeships.org.uk](http://www.apprenticeships.org.uk)

provides information and support to employers considering recruiting an apprentice, including details of the £1,500 grant available to employers recruiting a young apprentice (16-24). NAS has officers with designated lead responsibilities for the social sector.

Apprenticeship Frameworks in roles specific to the social sector have been developed by Skills-Third Sector [http:// www.skills-thirdsector.org.uk](http://www.skills-thirdsector.org.uk)

The frameworks are in Fundraising, Campaigning and Volunteer Management.

FairTrain [http:// www.fairtrain.org](http://www.fairtrain.org) is the Group Training Association specific to the sector that supports employers in accessing training and other support related to apprenticeships with guarantees on quality.

Change makers

<http://www.changemakers.org.uk>

Type: Leadership programme

Organisation aims to work to unlock the leadership potential of young people. Offers a 3 month leadership programme, of training, coaching, peer support and real world leadership experiences, placing young people (16-25) in real situations with opportunities to lead and in the process develop a new generation of leaders.

CityYear

<http://www.cityyear.org.uk/index.php/join-us>

Type: Volunteering scheme

City Year is the leading youth and education charity in London. Young people that join City Year dedicate a year to volunteering full time in schools as tutors, mentors and role models and CityYear aims to have a transformative effect on the lives of the children that they work with, and also the lives of the volunteers that serve with them.

Create Foundation <http://www.createfoundation.co.uk/>

Create is a social enterprise that runs an innovative work based mentoring program and creates jobs for the most marginalized people. Create Academy consists of 12 week personalized work programme in a safe, supportive environment. Trainees are provided with quality training, hands- on work experience, opportunity to gain nationally recognized qualifications (certificate in food hygiene and health and safety) and mentoring (mentors help with reviewing CVs, providing references and helping in job search).

Dare2Lead - <http://www.dare2lead.co.uk/>

Dare2Lead offers training programmes, motivational speakers and consultancy/support offered to organisations (such as vInspired). They aim to encourage leaders – especially young people – through programmes delivered by trained leaders.

PopUp Talent:

<http://www.popuptalent.org>

Type: Personal and professional development programme

GoodPeople have teamed up with Foyer Federation and ChangeMakers to engage young people through the use of Pop Up events held in familiar places which will spark young people's interest. Those who are keen may progress into the Talent Generator, a 12 week skills development programme which will help them find their passion and gain digital skills and from the Generator, these young people will have access to the Talent Pool where they will be connected to employers and opportunities

Trainee Programmes and Work Experience

Fair Train – [http:// www.fairtrain.org](http://www.fairtrain.org)

Fair Train has just started a UKCES funded two year project “Employer Pathways to a skills Youth Workforce in the Third Sector” that aims to provide a sector-specific, high quality Work Experience and Intern brokerage service, provided through a quality assured framework and including support for line managers and supervisors in managing the young person on either a Work Experience placement or Internship effectively.

Uprising - <http://www.uprising.org.uk/>

Aimed at inspiring people from diverse backgrounds to become the future leaders of society. Trains young people from four key areas to work on a specific local campaign, as well as introducing them to leaders within the public and private spheres.

YearHere

<http://yearhere.org>

Type: Graduate Scheme/fellowship programme; Placement, training and leadership development

Year Here is a social enterprise; offering an alternative to traditional gap years, it challenges ambitious and entrepreneurial young people to a 6-month fellowship tackling social issues in their own backyard, including training, social entrepreneurship project and professional placement. It partners with Teach First, Citizens UK and Social Investment Business.

2. ENTRY ROUTES FOR GRADUATES

Charityworks

<http://www.charity-works.co.uk>

Dedicated to finding and developing future leaders for the non profit sector, Charityworks is a national graduate development programme open to any charity, housing association or social enterprise regardless of size or turnover. Delivered through a collaborative model, graduates are employed to deliver a real job for 12 months whilst taking part in an ILM accredited management training programme, delivering 3 original pieces of research and accessing support from a mentor, peers and sector-wide networks.

Community Care Graduate Training Scheme

<https://www.nsocialcare.co.uk/programmes/graduate-training-scheme>

Funded by the Department of Health, this Scheme is part of the Skills Academy's mission to promote and foster high quality leadership and management. This programme is for graduates interested in a management career in adult social care. The scheme provides a 12 month bursary, training programme and placement.

Entrepreneur First

<http://entrepreneurfirst.org.uk/>

This programme was designed for top graduates who want to create disruptive, high-growth businesses as soon as they leave university. Selected candidates will become part of a group, from which they can build a team and Entrepreneur First will help them build their team as well as providing them with [mentors](#), [training](#), [other ambitious entrepreneurs](#) and [access to funding](#). The scheme runs for one year and is unpaid.

People and the Planet.

<http://peopleandplanet.org/careers/internships2012-13>

People & Planet is the UK's largest student network campaigning end world poverty, defend human rights and protect the environment, based in Oxford. Their 11 month long paid internship scheme focuses on developing campaigning skills.

Student Hubs

<http://www.studenthubs.org/xwiki/bin/view/Main/Graduate+Scheme>

Student hubs is a registered charity and through their graduate programme they are offering 12 opportunities for high-performing graduates who want to develop a career in the not-for-profit sector. The programme is a fully funded 10 month placement, guaranteeing graduates a wide range of experience across the organisation including working on programmes, communications, fundraising, events management and business development.

Cancer Research UK

<http://graduates.cancerresearchuk.org/programmes/graduate-scheme.aspx>

CancerResearch UK: the largest fundraising charity in the UK, whose research aims to delivers the breakthroughs which prevent, control and cure cancer

Scheme: Runs a 2 year long paid graduate training schemes in science and research, corporate services, fundraising and marketing, communications, information technology and all graduates receive training and development.

Amnesty International

<http://www.amnesty.org/en/job-type/internships>

Amnesty International: Amnesty International is a global movement of more than 3 million supporters, members and activists in over 150 countries and territories who campaign to end grave abuses of human rights

Scheme: Recruits unpaid interns for their International Secretariat (IS) offices in London, Geneva and New York. Interns work for six-month periods carrying out administrative and project-related work.

Barnardo's

http://www.barnardos.org.uk/get_involved/volunteering/volunteer_internships.htm

Barnardos: Barnardo's aims to transform the lives of vulnerable children across the UK through the work of projects, campaigning and research expertise.

Scheme: Runs a variety of unpaid 12 week long internships in a number of departments across the UK. The internships focus on marketing, finance, policy and research, campaigns and communication, children services and retail.

The British Red Cross

<http://www.redcross.org.uk/Get-involved/Volunteer/Internships-and-office-volunteering/Volunteer-internships>

British Red Cross: is a volunteer-led humanitarian organisation that helps people in crisis, "whoever and wherever they are".

Scheme: Runs a selection of 8-12 week long unpaid internships in a variety of locations around the UK, with a focus on Fundraising

The Charities Advisory Trust

<http://www.charitiesadvisorytrust.org.uk/cat-work>

Charities Advisory Trust: dedicated to finding practical methods of redressing inequalities and injustice

Scheme: Offers short paid internships (October to December) or early-entry 'advanced' internships (of varying length), focusing on the Card Aid service, for those who have two years' work experience post-graduation

Dyslexia Action

<http://dyslexiaaction.org.uk/news/two-exciting-internship-opportunities-available-within-fundraising-team>

Dyslexia Action: Dyslexia Action is a national charity that takes action to change the lives of people with dyslexia and literacy difficulties.

Scheme: Runs a voluntary unpaid internship scheme that covers a range of departments within the organisation.

Macmillan Cancer Support

<http://www.macmillan.org.uk/GetInvolved/Volunteer/Internships/InternshipScheme.aspx>

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Macmillan Cancer Support: provides practical, medical and financial support and push for better cancer care.

Scheme: Runs an unpaid internship scheme focusing on events, communications and fundraising.

Oxfam

<http://www.oxfam.org.uk/get-involved/volunteer-with-us/find-a-voluntary-internship-opportunity>

Oxfam: Oxfam is a global movement of people working towards a world without poverty
Scheme: Offers unpaid internships lasting between three and six months and a long-term internship lasting between six and twelve months in different locations and areas of the organisation.

Look Ahead (housing association) <http://www.lookahead.org.uk/Graduate-scheme-7970.html>

Look ahead: is a housing association that supports around 6,000 people across London and the South East each year.

Scheme: A 12 month paid programme that provides specialised training based in services or business areas of Look Ahead's work and encourages participants to work towards their Management Foundation Programme award.

Sanctuary (housing association) <http://www.sanctuary-graduates.co.uk/>

Sanctuary is a housing association which builds a range of new developments from housing to care homes, student accommodation to office buildings

Scheme: This paid programme lasts between 18-24 months, and there are two parts to the scheme- an introductory programme and then rotational business placements; these placements occur within Central Services, Housing, Property Services, Sanctuary Care and Sanctuary Management Services.

TRADITIONAL RECRUITMENT ATTRACTING GRADUATES

Prospects

<http://www.prospects.ac.uk/>.

Focus on providing advice on the best way to get a job within the sector and advertise current vacancies within the 3rd sector.

Graduate Recruitment

<http://www.graduate-recruitment.co.uk/>

Graduate Recruitment Bureau <http://www.grb.uk.com/>

Milkround <http://www.milkround.com/>

A large website advertising vacancies and schemes aimed at graduates. Recently updated their website, and beginning to offer more jobs in the non-profit sector, now including a whole page overview of the sector.

3. INITIATIVES THAT CONNECT PEOPLE ACROSS THE SECTOR

Common Purpose <http://www.commonpurpose.org.uk/about>

Common Purpose: Common Purpose is an international, not-for-profit organisation which runs leadership development courses which mix people from the private, public and not-for-profit sectors”.

Charity Next

<http://www.wig.co.uk/CharityNext>

Charity Next is an initiative to improve understanding between the sectors through secondments. Charity Next gives (graduates) leaders and future leaders in the private and public sectors the opportunity to contribute their skills and enthusiasm to key posts in the voluntary sector, in order to facilitate an exchange of expertise, build greater mutual understanding and encourage closer working.

Clore Social Leadership Programme

<http://cloresocialleadership.org.uk>

Offers an individualised Fellowship leadership development programme for future leaders in charities, social enterprises and community organisations. Is now building a network with the wider Fellowship as the earlier Fellows complete the development programme. Annual intake from open online selection process.

Clore <http://www.cloreleadership.org/>

Offer a variety of training programmes for the future leaders and current managers within the sector. The programme was created in partnership with Arts Council England, Clore Duffield Foundation and a number of other art councils and art related institutions.

Good people

<http://www.about.goodpeople.co.uk>

Type: Platform for ideas, opportunities, mentoring

Funded by the Cabinet Office, Good People is a free peer-to-peer platform for posting ideas, jobs, internships and voluntary opportunities. The aim is for GoodPeople.co.uk to become an essential tool for anyone who wants to use their time, skills & networks as a force for good.

IVO

<http://ivo.org/>

An on line platform for connecting people and organisations that want to change their world. Open to anyone interested in volunteering time, sharing ideas, networking with social activists, accessing resources.

TSRC

<http://www.tsrc.ac.uk>

Live research project exploring the nature of careers in the sector.

<http://www.tsrc.ac.uk/Research/WorkforceandWorkplace/WorkingLivesandCareers/tabid/848/Default.aspx>

Skills-Third Sector

<http://www.skills-thirdsector.org.uk/>

Skills-Third Sector is an independent charity working to support the development of a sector workforce that is ambitious, skilled and adaptable in achieving the objectives of the organisations they work for and the communities they serve.

It has four current developments that will all enhance the recruitment and development of talent in the sector:

- 1) The Skills Platform – a highly interactive web platform designed to support organisations and people in the sector to access training and development opportunities in a more informed way and to enable the sharing of training and development resources across the sector via an online marketplace and information source. Due to be online in September 2013.
- 2) Skills Clubs. These are a brand new idea and initiative aimed at facilitating collaboration between employers in the sector
- 3) Developing resources for articulating example career pathways in the sector (part of the work arising from the Leadership 20:20 Commission recommendations.
- 4) Developing a leadership development framework specific to the sector.

Networks

There are many diverse networks available to people working in the non profit sector or people interested in social change. Here are a few all accessible through Linked In Groups:

Convergence, Charity UK, Good People, Civil Society Global Network, European Civil Society Leaders, Guardian Social Enterprise Network, Non Profit and Charity Network, Non Profit Management Professionals, Social Entrepreneurs, Social Entrepreneurs & The Third Sector, Social Impact Exchange, SocialEarth, Social Change Network, Third Sector Connector, Third Sector Women, UnLtd.

4. ENTRY ROUTES FOR CAREER CHANGERS

Prime Timers

<http://www.primetimers.org.uk/about-us/social-enterprise>

Type: Consultancy & Expertise to organisations and individuals

Offers quality business and organisational expertise to work in partnership with charities, voluntary groups, social enterprises and other types of existing and emerging civil society organisations, to build their capacity and to achieve real social change. Also offers advice to executives who are in transition and who want to use their skills with social enterprises and charities

Working for a Charity

<http://www.workingforacharity.org.uk/about.html>

Type: Training, resources and some opportunity for work experience

Run by the NCVO, Working for a Charity aims to serve as a bridge for those wishing to transfer their skills to the voluntary sector through [training](#), [information](#) and work experience; offers training courses, information and advice to career changers, returners to work and new graduates on how to transfer their skills effectively into the charity sector and the unique management issues they may face.

On Purpose

<http://onpurpose.uk.com/>

Aimed at experienced and qualified professionals, On Purpose programme participants become Associates (throughout the programme) & Fellows (after graduation). The aim is to find and work with professionals at an early point in their career to grow the next generation of social enterprise leaders

Theme 4 – Skills sharing

It is easy to imagine something that sounds as simple as ‘skills sharing’ would feature significantly in the support on offer to the majority charities and community groups. Indeed the concept of **giving time, expertise and resources** has always defined the sector just as much as the giving of money. Many charities and community groups benefit from people connecting with them to share skills and expertise and the positive stories they tell about **the impact of this are clear evidence of the value of these relationships**.

Much of this happens informally and many organisations offering and benefiting from this type of support are creating these opportunities themselves without any external brokerage. Some would not even give these interactions a label such as ‘skills sharing’.

We have attempted to **focus on one-to-one support that builds capacity and capability** within social sector organisations that that they have not had to pay for. We are conscious that there are many different labels and approaches to delivering these benefits –including venture philanthropy, pro-bono, grants-plus, employer supported volunteering - but we have not sought to make judgements about whether some are better than others.

It is impossible to map the totality and variety of existing activities and initiatives and it makes little sense to attempt to do so – we can say that, broadly speaking, there are two **main areas where skills sharing is employed by the social sector**:

- **Support for groups at a strategic level** to build their leadership and adaptive capacities.
- More practical support to help with everyday problem solving and enhancing their practice and delivery.

This support comes from a range of sources and is brought into all levels of organisations. A lot of support is offered by individuals and the private sector but peer-to-peer support and collaboration amongst organisations is also very common and should not be undervalued. Often the **outcomes of skills sharing can be mutually beneficial**, for example for the private sector where motivations combine CSR, PR and staff development whilst offering parts of the social sector access to professional advice that could not otherwise be afforded.

One thing that has come through very clearly in the conversations that we have had for this review is that **the brokerage of these relationships exists in many forms but is crucial to their success** - there is much good practice to be shared, in both cross-sector initiatives and within the VCSE sector.

However, throughout this review we have identified that **more could be done to foster the development of these relationships** on a more widespread, albeit more localised, scale and to create greater value for those who participate on both sides of the equation.

Our focus has been to identify what is happening already, draw out some of the challenges and promising solutions and make recommendations for improvements now and in the future.

What's happening already?

There are many examples of brokerage for support that focuses on helping charities with everyday problem solving by accessing professional advice that they could not afford at market rates, this is particularly prevalent with legal work through initiatives such as [Bar Pro Bono Unit](#) but a broad range of strategic and operational support can be sourced through more wide-reaching initiatives such as [PrimeTimers](#) and [Reach Skills](#).

There is also a wide range of initiatives that operate at a more strategic level to broker support, such as:

[Business Connectors](#) engages major businesses to send members of their senior staff to work on building better connections between local businesses and community organisations over periods of 6-12 months in targeted communities.

[PilotLight](#) matches and manages teams of senior business people with local charities and social enterprises to tackle social disadvantage through planning for growth, development and sustainability. This model is structured in a way that only requires senior professionals to give three hours a month.

[Impetus](#): provides support as a pioneer in the UK of venture philanthropy, with support consisting of funding, hands-on management support and in-depth specialist expertise. Social Action Fund investment will directly create over 800 high-impact social action opportunities for over 1,000 professionals.

The [Kilfinan Group](#) is a group of senior business people who provide free and informal mentoring to charity chief executives. The Group was founded by Nicholas Ferguson, Chairman of BSkyB plc, in 2003. It now has six 'Chapters' and around 120 members. Mentors, who volunteer their time, have extensive business experience and each brings a range of skills and interests. The Group is informal and, once matched, mentors and mentees are free to structure their relationship to fit their needs and styles.

[The Cranfield Trust](#) offers small and medium sized charities free management consultancy support through a network of 700+ highly-skilled, commercial sector professionals around the UK. Working with 9 regional Trust Project Managers who broker the engagements between volunteer consultants and voluntary organisations, the Trust has a 24 year history of successful consultancy work, in order to build skills, capacity and sustainability. There are also a growing number of small consultancy firms that aim to operate in the space between businesses and charities to help them maximise the value of their relationship. One such agency [CoCreate](#) is a good example. They share their consultancy process model online and some interesting case studies (www.cocreateconsultancy.com/what-we-do) which illustrates the approach they take to helping each side of the partnership identify the value they want to see from the partnership, right through to evaluating the impact of relationship.

[Young Philanthropy](#) is a new platform for young professionals to take a leading role in making a positive impact on society. Its **Young Philanthropy Syndicate** is a new model to enable young professionals to invest in niche projects, with the support of experienced philanthropists.

There is a strong heritage of localised volunteer brokerage, through routes such as volunteer centres. Recently new volunteer initiatives have been launched to help drive local business interaction with charities as well as individual and employee-supported volunteering in different ways, such as:

Tameside4Good (www.tameside4good.org.uk) - an initiative of Community and Voluntary Action Tameside that is increasing giving in different forms, by making it easier for businesses and people to help local good causes through the giving of time, skills, money and resources. Recognising the value of a strong local brand. This innovative approach is being scaled out by enabling other areas to access a licence to use the "4Good" brand in their area, but with its own local identity and focus.

An imaginative approach at a sub-regional level is the *Buddies* programme in the Black Country covering the four local authority areas of Sandwell, Walsall, Wolverhampton and Dudley. The programme offers four types of buddies – Finance, Funding, Marketing and Business – each with a different emphasis, but all focussing on areas in which smaller local organisations need to be strengthened in order to be more successful and sustainable in the future.

There are also many localised 'time bank' models, which tend to focus on skills sharing by people within communities, rather than between sectors and organisations. A good example is <http://skills2exchange.wordpress.com/> which covers a part of Nottingham. This small scale social action is highly valuable and there may be some lessons which transfer into brokerage of skills sharing between organisations.

Collaboration

While skills sharing from businesses and individuals to the sector occupies much of the narrative on this subject we should not ignore the benefits of collaborative initiatives within the sector. These approaches involve like-minded organisations operating within a similar field and can be done on a 'little and large' basis, recognising that benefits can be achieved on both sides of the relationship.

At an individual level **action-learning** is a significant and powerful method of brokering such approaches, used within the sector and across sectors, for personal and professional development. It enables individuals to reflect on their own practice, learn about the experiences of others and find solutions to problems in a safe and supportive learning environment.

NAVCA has worked with sector leaders in a number of localities to bring together local practitioners around approaching big issues that no one group can tackle alone, such as child sexual exploitation in Wakefield.

The *Share London* initiative set up by the Museums London Group has supported some great collaborations by enabling museums to share skills and resources. One [case study](#) where curators swapped skills between the Natural History Museum and the Hunterian Museum demonstrates how the 'little and large' dynamic can work effectively.

Skills Clubs are a collaborative cluster of charities facilitated by **Skills-Third Sector** (www.skills-thirdsector.org.uk) that offer practical, quality-assured, work-based learning

and development alongside efficient procurement of quality, class-based training and qualifications, creating a pipeline of skilled workers to compete in the delivery of quality services. **Skills Third Sector** are also currently developing an online Skills Platform (www.theskillsplatform.org) to enable quicker and easier sharing of skills and expertise with and across sectors.

Key Challenges:

Where should our focus be?

Clearly, not every charity and social enterprise needs or wants this type of support. If we were to prioritise a segment of the sector that would value this type of support the most then it would be small to medium sized organisations that might be described as having 'growth potential' but also experiencing 'growing pains', i.e. they are facing major challenges of leadership and skills if they are to grow to achieve their full potential or to survive.

For this segment the current market for pro-bono and skills transfer services often fails to deliver:

- It is too hard to find support
- their leader's capacity to spend time framing their needs in an accurate and intelligent way, looking for support and making it work well is limited
- Too much of what is on offer is not quality assured, is low value and clutters the market.

Who get supported?

Skills-sharing for leadership often focuses on providing support to SMT and CEO – neglecting development of other leaders and potential leaders in the organisation and making it more challenging to spread the value derived throughout an organisation.

In smaller organisations many CEO and managers will find themselves with multiple portfolios that would each be one job with a defined skillset and career path in larger organisations. Many CEOs will find themselves being the de-facto head of HR, marketing, finance, IT etc. It does make sense to focus on the CEO as potentially benefiting from professional advice from people specialising in each of these fields but this need not be the whole story.

In trying to better connect people in professions within the sector and like-minded professionals in other sectors it might make sense to talk much more about this type of support being about skills sharing between professions rather than organisations. This also moves us away from the 'paternalistic' sense of 'pro-bono' and recognises mutual benefits.

Many initiatives tend to sort people by the type or size of organisation or the topic or the organisational function and there is less focus on organising people into professional groups. The sector has well established bodies for CEOs (acevo) finance practitioners (CFG) and fundraisers (IoF) but beyond those there aren't many high profile bodies based on

professional groupings. We're not suggesting the proliferation of new organisations and professional bodies but there must be scope in initiatives like the Skills Third Sector Skills Platform for better connections to be made by people in similar job within and across sectors.

Can the best ideas and approaches be scaled up or scaled out?

Existing high value programmes have a proven success but do not operate at scale and it would be difficult to replicate these models by scaling them up. Many tend to be London-centric. Effective local brokerage is clearly in place in some areas but not others.

The business model for many brokerage initiatives, local and national, requires up-front funding to set up and sustain the scheme. Many local infrastructure organisations are using investment from the Transforming Local Infrastructure programmes to build such initiatives.

If scaling up is not achievable because those high value models are driven by an intense concentration of resources and effort in a small number of relationships, then perhaps the best approach is to focus on 'scaling out' by supporting people and organisations in localities to develop their own models and approaches that build on the best of existing practice.

Positioning this kind of support within the overall framework of volunteering creates a number of problems:

- There is a diminishing pipeline of volunteering opportunities as charities and community groups scale back and close down. Those that do have opportunities are more likely to place stricter terms on what kind of volunteers they want, i.e. they need to be ready to go and able to self-manage.
- Changing motivations for volunteering, e.g. the 'company day out' is leading to increased expectations but for shorter periods which is placing a higher transaction cost on brokerage and less long-term benefit for the charity or community group.
- There can often be a mismatch between what's on offer and the expectations of the volunteers. Examples are often cited about groups of employees wanting a 'sugar rush' from volunteering that helps them have experiences beyond their normal roles when charities might benefit more from accessing the skills they use in their day job.

Recommendations

Cultural

SR 4.1 To achieve a step change in the number and quality of these types of relationship it is suggested that it would be helpful to reframe this type of support as ‘skills sharing’ and where possible a beneficial exchange between both sides of the relationship should be sought.

To improve brokerage:

SR 4.2 To address the mismatch between what is needed by charities and the expectation of volunteers support, **brokerage providers could provide resources to help organisations diagnose their needs and aspirations and identify how best skilled volunteers could support them.** We know that many organisations are not well practised in developing specifications for consultants so support to articulate what help is needed might also be beneficial.

When there is not always an obvious exchange, brokers could adopt a ‘pay it forward’ approach where the organisations benefiting from the support repays it to another organisation instead of to the person who helped them.

SR 4.3 There is much promise in **local solutions, brokered by a trusted go-to organisation, like a local infrastructure body**, that has the reach and profile within their community to build and sustain a programme. They are well placed to build lasting bonds, have a good sense of what the local needs are in their patch and what works best. Smaller local organisations are more likely to have their interest in benefitting from this type of support stimulated by a local broker.

For a local infrastructure body that is looking for ideas of how to develop a local initiatives there are a number of things they can do:

Adopt and create a local brand by those offering ‘scaled out’ models, such as the ‘Tameside4Good’ idea and approach, which gives them a head-start in establishing a local brand in which they can build ownership and pride. The buddies brand from the Black Country might also be a good source of insight.

Talk to BITC about whether a Business Connector will be working in their locality and use this connection to build the initiative.

They could talk to one of the national programmes or London –based programmes listed in the first section of this report such as Cranfield Trust, Impetus or Pilotlight to see if they will share their insights and help them create a local version of their approach.

The Minister could host a roundtable with these types of organisations to see how their models can be developed to help people establish local brokerage schemes.

To support better interaction with other sectors:

SR 4.4 There should be a focus on **building the interest and capacity of local SMEs** to be involved in such initiatives. Many local infrastructure organisations already have effective relationships with their local Chambers of Commerce and this seems the best starting place to secure a good supply of support.

Possible actions to support this could be:

The Minister could support this through a meeting with national federations working with SMEs.

Businesses involved in local brokerage schemes could provide support to the broker to develop the business model so it can operate on a self-sustaining basis. Drawing on the 'Business Connectors' model, make employer supported activity more about creating more opportunities for companies to develop future leaders and managers outside their organisation through placing them with charities and community groups.

Additional Recommendations

AR 4.1 A review should be undertaken of the potential for Universities and Colleges to play a stronger role in the family of organisations providing skills sharing with the voluntary sector possibly in collaboration with NUS. For example a new five year programme is being established in Leeds called ACTS! (Academic Collaboration for the Third Sector in Leeds) that will foster greater collaboration between Leeds University and the sector. There will be other examples around the UK and it would be good to get a better insight into what's happening already and how this might feature in a skills-sharing initiative.

AR 4.2 The Skills Third Sector Skills Platform should enable people to identify their profession and to participate in sharing and exchanges created with the needs of that professional grouping in mind. This should link to similar professional grouping within the private sector and strong messages should be shared with them about the benefits of building the success and the esteem of their profession with the public through their involvement in such initiatives. The [Taproot Foundation](#) in the USA is a leading player in developing pro-bono and has a [pledge](#) which people can sign which positions pro-bono support as a positive contribution and an essential part of their profession.

Theme 5 – Digital Fluency

The digitisation of the UK

In the short space of 20 years, **digital technology has affected virtually every aspect of life in the UK**. 92% of UK adults now own a mobile phone, and 76% of households have broadband. The UK ranks 9th in the world for internet use, which has led to the wider environment in which the social sector operates - including their beneficiaries, donors, customers and stakeholders - to change rapidly as a result of technological innovation.¹ Interacting with digital and social media are now normal everyday parts of life for the majority of the population.

Adapting to new technology is not something new for NGOs in the UK. **The social sector has always proved itself resilient in the face of change**. The relatively recent rise of digital technology is just one more change for a sector that has proven itself extremely adept at adapting to leaps in technological innovation.

However, what distinguishes digital technology from previous leaps is that it represents more than just a static set of new circumstances. **Digital has instigated a shift towards a world where constant, on-going change has become the new baseline**. A commitment to being willing to adapt is more important than adopting any one specific digital technology. Adapting to digital is a journey rather than a destination in itself.

The way in which certain technologies have brought about change in this wider environment also means that the way in which **people expect to be engaged and interacted with by the social sector has shifted**. It is vital that organisations keep up with this for the benefit of their continued effectiveness.

Although there is a general awareness within the sector of its importance and some fantastic examples of organisations that have used digital technology to great effect, the level of digital fluency is not nearly as high as it needs to be. With massive benefits for those who do take the plunge (costs cut, increased reach and collaboration, and easier ways of demonstrating impact) and potentially disastrous consequences for those who don't (over-priced, isolation, disruption, lack of relevancy), **it is clear that increased digital fluency is an absolute necessity** if the UK's social sector is to cope with, and adapt to, the significant funding pressures it currently faces.

Why digital fluency is a must

The potential benefits are huge. Digital and technological capability offers huge opportunities and is changing the way that organisations across all sectors operate in the UK and elsewhere. One analysis saw that 35% of charities with a social media account had increased donations over the previous two years while 66% stated that being online helped

¹ <http://techcrunch.com/2012/12/18/europe-72-of-homes-are-now-broadband-connected-online-reading-is-users-favorite-pastime/>

lower operating costs.² It also estimated that if the UK voluntary sector could allocate an additional 10% of its fundraising and publicity budgets toward digital, its non-commercial income could potentially be increased by as much as £3bn each year by 2017.³

There is value to be added beyond cost-cutting: Digital fluency not only can deliver cost savings, but it offers opportunities to improve and add value to the ways that the sector currently works with its beneficiaries. Making improvements in education, connecting communities more effectively, helping people into work, and offering better health and social care to marginalised sections of society can all be made more effectively by being digitally fluent.

*However, this is not just a matter of taking advantage of some clear benefits. There are **massive** risks for organisations that fail to take steps towards becoming digitally fluent.*

Disrupt or be disrupted: In Europe as a whole, the digital economy is growing seven times faster than the rest of the European economy.⁴ Organisations that do not adapt to technology and digital fast enough become vulnerable *extremely* quickly, as other individuals and organisations can self-organise extremely quickly. If they do not evolve and try to disrupt their own working models, they can be disrupted themselves and left by the wayside.

Stakeholders have already adapted: Social media is part of how the world now does business and communicates. In the UK alone there are 41 million people on Facebook, and 10 million on Twitter.⁵ Digital will be, if it isn't already, the preferred means of communications with most stakeholders. As a result, relationships with donors have changed, whether organisations like it or not. Although this poses risks for those that do not adapt, it also offers a way of creating entirely new forms of partnerships with stakeholders.

Isolation is a real possibility: The fast pace of this change can, and does, lead to organisations becoming isolated from potential beneficiaries, customers, volunteers, stakeholders, partners and others. Leaders can often be more resistant to technology and digital working than others. Scepticism and personal lack of experience, stemming in part from generational differences and a lack of genuine understanding, often prevents leaders from leading from the front on such issues.

² http://www.go-on.co.uk/files/2113/5237/0908/The_Booz_Report_Nov2012.pdf p.28

³

⁴ http://europa.eu/rapid/press-release_IP-12-1389_en.htm

⁵ <http://www.unity.co.uk/upload/pdf/About%20that%20First%20Tweet%20-%20a%20practical%20guide%20to%20%23socialmedia.pdf>

Strategic Recommendations

SR 5.1 Government and Sector Infrastructure bodies should support initiatives to promote and up-skill sector individuals and organisations in digital technology, as a lack of staff skills can be a huge barrier to using them effectively. In a survey of the UK's top 100 charities, 61% said that levels of digital literacy within their organisation are not very good, poor or very poor.⁶ Staff need to be given the skills and resources to become digitally fluent through affordable hands-on training, online training and skills-sharing brokerage (including digital volunteers). Opportunities will be available through GO-ON UK and other initiatives.

SR 5.2 Leadership programmes and organisational development should ensure that digital skills are part of leadership development by default. Although there is a general awareness of the need to become digitally fluent, there is often a lack of knowledge around how to do this in practice. Mentoring and skills-sharing with digital natives offers a mutually beneficial and inexpensive way of doing this.

SR 5.3 Governance & leadership of social sector organisations should have a significant level of digital expertise in at least some of its members and lead this from the front, exemplifying best practice and encouraging use. Over half of the digital managers of the UK's top 100 charities believe their senior managers have a poor understanding of digital, with many saying that while digital is prioritised on paper, in practice senior managers are very unclear about what they want.⁷ And there is often little or no sense that there is any awareness or drive towards digital coming from the organisation board. Only 0.5% of charity Trustees are between the ages of 18 and 24⁸, indicating a severe shortage of digital natives at Board level.

SR 5.4 Infrastructure bodies should collaborate to support and initiate a trust-based online service to promote and rate tools, solutions, learning, initiatives and communities of best practice for the sector (akin to the [trip advisor](#) model / [STS Skills Platform](#)). Work also needs to be done to ensure that organisations are not wasting resources by duplicating existing resources and tools. Communities of practice around specific areas could include:

- Attracting digital talent
- Engaging donors – a key fundraising development area
- Operational efficiency including recruitment of staff and volunteers
- Open Standards
- Transforming service delivery
- Social media

⁶ <http://www.cogapp.com/sites/default/files/Leading%20Digital%20Transformation%20Report.pdf> p.18

⁷ <http://www.cogapp.com/sites/default/files/Leading%20Digital%20Transformation%20Report.pdf> p.18

⁸ <http://trusteesweek.blogspot.co.uk/p/trustee-facts-and-figures.html>

Additional recommendations

AR 5.1 Working group and partners should promote and support digital as an opportunity around which operations and delivery can be redesigned for better efficiency and effectiveness, using initiatives like:

- [Hackdays](#)
- [Challenge Prizes](#)
- Meetups (eg. NFP Tweetup)
- Social media Surgeries (e.g. [PodNosh](#))
- Tech for Social Good Awards

Appendix for Digital Fluency

Best practice case studies

- Avaaz –They also offer the public their online petitioning tools, enabling people around the world to start and win campaigns at the local, national, and international levels. Using simple online and social media tools, this online campaigning site has amassed over 21 million members worldwide since 2007.
- Cartrefi Cymru, a charity that helps people with learning disabilities, found it saved £50k per year on travel costs through the use of videoconferencing

Crowdfunding platforms

Crowdfunding allows organisations or individuals to raise money for a project online from a number of donors. You can find a detailed list of most of the potential crowdfunding platforms available [here](#).

- [Cancer Research UK](#) raised more than £1m through its [My Projects](#) platform, which allows funders to choose which specific project they want to give to.
- [Peoplefund.it](#) - Originally a way for charities to raise [funds](#), crowdfunding is increasingly used by entrepreneurs to raise essential financial backing for exciting new projects.
- FundRazr.com has raised over \$20 million for personal and charity Fundraisers in 20 countries and a global \$1 Million campaign for Save the Children.

Text-messaging

Text-messaging has become such a pervasive activity that it's easy to discount it as a form of digital technology. However, text-messaging has changed the way that many organisations work, whether they consider it to be digital or not. Because of its wide-usage (92% of the UK's adult population own a mobile phone), text-messaging is often the most effective way of communicating with stakeholders, and a very simple, practical method of fundraising.

- [Activist SMS](#) – **ActivistSMS** makes it easy for community and voluntary sector organisations and front line public service staff to use the power of texting to support their work.
- [Lifeline](#), a charity providing drug and [alcohol treatment](#) services, demonstrates such creativity. Lifeline sends its clients a positive quote in a text on a weekly basis, designed to provide a light touch contact with the agency, and boost clients' mood and resilience.⁹
- [Creation Trust](#) - in January more than 300 residents on the Aylesbury estate in south London, Europe's largest social housing project, found out about job opportunities through a text message. The text helped to ensure that more than 200 people turned up to the showcase, and attendance was significantly higher than previous employment events in the area.

Online skill-sharing platforms:

- [Give What You're Good At](#) – An online platform 'dating' site for charities and skilled volunteers to be matched together for suitable projects and roles.
- [Do-it](#) - the UK's largest volunteering database with over 200,000 people per year finding relevant volunteering opportunities with charities and in their local communities.
- [Timebank](#) –
- [ivo](#) - ivo makes it simple to connect, share and learn with like-minded others whilst providing a first class infrastructure service to extend the capacity of civil society organisations.
- [Sparked](#) – micro-volunteering opportunities for private sector employees to work with non-profits (US based)
- [GoodPeople](#) – A peer-to-peer marketplace for people to use their skills for charity and social enterprises to develop online movements for their work.
- [Slivers-Of-Time](#) – Makes it easy for people to volunteer their spare time to employers, volunteering organisations or their local community.

Skill-sharing resources and brokerages

- [Media Trust](#) – Media matching service to find volunteering opportunities for media/communications professionals, offers [free resources](#) and [free professional support](#) for charities.
- [Coalition for Efficiency](#) – A step-by-step process and handbook for skilled volunteers to help charities become more efficient and effective.
- [Pro bono Economics](#) – Matches volunteer economists/statisticians with charities wanting to address and demonstrate their impact on specific projects.

⁹ <http://www.guardian.co.uk/voluntary-sector-network/2013/apr/15/text-messaging-future-charities>

- [Bar Pro Bono Unit](#) – Acts as a clearing house, matching barristers prepared to undertake pro bono work with individuals and organisations that need their help.
- [City Action](#) - A free volunteering brokerage service linking City-based businesses with community organisations and social enterprises in the City and neighbouring boroughs.

Mentoring opportunities

- [Kilfinan Group](#) – a group of senior business people who provide free and informal mentoring to charity chief executives
- [Small Charities Coalition](#) – Provides a variety of services including skills sharing, mentoring, trustee matching to charities.
- [Knowledge Experts](#) – An online forum/blog space with 300 online experts available to answer questions about your charity. Their [Charity Leaders' Exchange](#) is an experience-sharing club for charity leaders and executive teams who want to drive positive change in their organisations, and has multiple video case studies, talking guides and men.

e-Learning

[Massive Online Online Courses](#) are changing the way that people access higher education, offering courses free of charge to anyone with an internet connection. There are ways of using this model to deliver skills training in other areas, such as digital fluency for the social sector. Some examples include:

- [skillshare.com](#) - Skillshare is a global learning community where you can learn real-world skills from real people. It offers the chance to learn real-world skills from anyone, anywhere. They have thousands of creative, collaborative classes on everything from programming to design to crafts.
- [Udemy](#) – Platform where you can create lessons and people pay to view them, effectively allowing you to monetise your knowledge and teaching ability. Lets you plan, create, publish, and promote your course(s), and connect seamlessly with students.
- [Hive NYC Learning Network](#) is a Mozilla project to fuel collaborations between cultural organisations to create new learning pathways and innovative education practices together. It is comprised of forty non-profit organisations—museums, libraries, after-school clubs and informal learning spaces—that create [Connected Learning](#) opportunities for youth.

Technology support

- [Community How To](#) –Helps community and third sector organisations find digital tools which could help them do more of what they do best, and helps them share their ideas and tools with others.
- [Eventbrite](#) – Simple, free tools that let you sell tickets and manage registrations for any type of event.
- [CiviCRM](#) is a web-based, open source, Constituent Relationship Management (CRM) software geared toward meeting the needs of non-profit and other civic-sector organisations. CiviCRM helps organisations grow and sustain strong relationships over time through fundraising, events management, mass-mail marketing, peer-to-peer campaigns and more via one unified solution. You can download it for free on their homepage.
- [About that first tweet](#) is a practical guide to social media for charities and social enterprises. It includes interviews with social media experts from Twitter, Facebook and LinkedIn, all of who give tips on how to best engage with the platforms they provide; case studies of organisations who've successfully used social media to achieve off-line goals; a checklist of reminders and tips; and further reading.
- [IT4Communities](#) - helps **charities, community groups and social enterprises** access free IT support from IT professional volunteers to make substantial savings. You can register [here](#).
- [Charities Technology Trust](#) – *CTT aims to work in partnership with the third sector to support and guide charities and not-for-profit organisations in the UK to use technology to enhance the way they work and collaborate. They offer*
- [NFP Tweetup](#) is a community of people who work at or with, charities and non-profit organisations who are interested in harnessing the power of digital and social media.
- [Go On](#) offer free tools to help develop basic online skills within organisations. They will soon be rolling out a series of free workshops regionally around the UK, starting with the North-East.

Theme 6 - Data-informed social change

Data is the new fuel for social change

It's the year 2020. We're looking back at the discussions we had under the auspices of the Social Sector Skills and Leadership Review and we're struck by just how many organisations across the public, private and social sectors are gaining either competitive advantage, fostering truly innovative collaboration or just delivering better outcomes by exploiting their most valuable resource: data. At the time of writing, we were already aware that data was [changing the way we live](#) .

One of the world's leading commentator's on the social sector, [Lucy Bernholz](#), was right: data is the new fuel for social change, and we are confident that the contribution of the Review has been to raise amongst our sector's leaders the importance of being data-informed by modelling the not just the leading edge implementations, but also the achievable. And by thinking about what roles and skills are needed for this brave new world, we helped the social sector think about its engagement with the Generation Y workforce, whose passion for social change is as great as any generation's.

Your view of this scenario will of course depend upon whether you agree with our core contention: that an ability to gather, manipulate, learn from and share data will inform and drive the most effective social organisations of the future. Many do agree. But we are aware that some people don't: furthermore, the current vogue for big, connected and open data may be a reflection of the point in the hype cycle. Some are already (rightly) arguing that being data-driven is not a substitute for vision and strategy. And a world of [geeks](#), [hackers](#), [wranglers](#) and [APIs](#) can seem impenetrable to those outside it. But it's primarily this hype, scepticism and confusion we seek to address, particularly as this theme is embedded in so many of the other themes covered by the Review. (API – Application Programming Interfaces)

There are clearly some big opportunities for the sector to use data more effectively for the greater good and we've thought about what they might be, who they could be for and how they could be realistically brought about. Organisations and individuals in the sector should find some useful thinking, information and tools signposted here – we've tried to draw out common issues and suggest some solutions for you. We have also made some more strategic recommendations on how the sector could work better together to ensure that we're getting the best out of this.

Do please get in touch if you have any thoughts, would like more info or can support us move these recommendations forwards, We would love to hear from you.

Data informed social change: the road ahead

The social sector is led by fantastic people with a passion for changing our world. But our own world is changing too: passion and gut instinct are no longer enough if we are to make the best use of limited resources, whilst the cultures and working practices of [Generation Y](#) – the digital natives – are often outcomes driven and sector agnostic. It's what Lucy Bernholz has called '[new skills for giving](#)'. [Social innovation](#) is key: much of the social innovation we are beginning to see centres on sharing and exploiting data from all sectors. But for analogue, 'mainframe', organisations designed in previous generations to be formal, closed, competitive the cultures, practices and working methods of Generation Y are alien. And this includes putting data centre stage. To help us all unlock key changes here, our contentions – and arguably provocations – are that some organisations think:

- ***We need more money, not more data:*** *we think that organisations can achieve more if leaders think about data in the same way that they think about money. Data can have significant value, but it's too often thought about as a cost or a problem. In today's organisation the fundraiser is a key role. In tomorrow's, will it be a dataraiser? And where we have money to invest in skills, are we investing in data skills?*
- ***We don't have the time or skills:*** *this is a common refrain, possibly not helped by the regular use of large scale examples of data mining from the private sector (e.g. Tesco's [Clubcard](#)) that suggest data manipulation is only for large organisations or database analysts. We need more examples of small organisations (such as [Barnsley Hospice](#)) using '[medium data](#)' to improve their outcomes. We also need to think about what skills are needed in the new world of connected, shared and open data: data gathering (wrangling), analysis and [visualisation](#). Do we need M&E officers in 2020 or the [data scientists](#) employed by nonprofits such as [DoSomething.org](#)? And, as JRF's Julia Unwin has argued, data needs a [champion at board level](#) too.*
- ***We don't have the culture for open data:*** *sharing data on outcomes and performance is [scary](#). It might highlight that we aren't as good as we think we are. We'll lose funding. And it will be misinterpreted: people will compare apples and pears and conclude we are a lemon. But there's evidence that opening up your data will build trust: as the Government's [Open Data White Paper](#) notes, "transparency and trust are intrinsically linked". It will flush out the social entrepreneurs who will help you see patterns or uses for your data that unlock value, as these [inspirational uses of the London Data Store](#) show. And by being what [Beth Kanter](#) refers to as a '[networked non-profit](#)', it's likely that opening up your data will positively change your organisation culture for the better. Under your leadership, could your organisation open your data for others to use? The [slash open](#) movement is a simple place to start: here's [NCVO's example](#).*

- **Stories are more important than numbers:** donors aren't really influenced by analytics, they're emotional creatures influenced primarily by narrative. But why does the answer have to be either/or? Can't it be and? Data isn't just about measuring impact either, it's a tool that can be used to improve our delivery and make those narratives even better, as Bill Gates has argued in his [2013 annual letter](#) to the social sector. And what if more austere times are leading to the need for us to demonstrate more measurable outcomes?

If so, data take centre stage: and an important skill will be using data to tell stories. In some respects, this is the most important point: outcomes and impact should drive everything we do. And without giving data a central role to inform our impact planning and reporting, how can organisations achieve their potential? New approaches to funding and financing the sector will be driven by data leadership, so as leaders we need to be ready for what the Undercover Economist Tim Harford recently called '[an evidence revolution](#)'.

Strategic Recommendations

SR 6.1 We need a data manifesto for the social sector. This should identify who holds data about the sector (e.g. Charity Commission, funders) with proposals for data leadership: opening up data, the development of **common standards** (building on xbrl, as this [blog](#) suggests) around reporting and sharing, equivalent to those developed by the international development community ([IATI](#)). An example is the recent Aspen Institute report, [Information for Impact: Liberating Nonprofit Sector Data](#). This would include the development of tools (such as APIs) to facilitate greater sharing of data.

SR 6.2 We should develop a voluntary sector data store. This would provide a central rallying point, similar to data stores developed by government, where social organisations could deposit data, hook up with developers and hackers (a skills/data exchange) and find examples of social innovation driven by data so that leaders have examples of what can be achieved. Likewise, individuals could showcase their own innovative uses of data. Whilst [NCVO](#) and [Lamplight](#) have made putative efforts, a bigger push will help to model openness and innovation (as [SOFII](#) has shown in the case of fundraising)

SR 6.3 We need data champions at board level. Data champions would focus on the development of data as a strategic asset, rather than simply focus on data as a cost – and a risk to be managed. This includes developing better narratives for the return on investment for the '[analytic investment](#)'

SR 6.4 We need to model what can be achieved by data informed organisations. This could be a social sector champion based at the [Open Data Institute](#) or [DataKindUK](#); the role would aim to move the debate on data away from technical discussions around APIs to

working with leaders on demonstrating and sharing the benefits of data informed approaches, with a particular emphasis on small organisations.

SR 6.5 We need better recognition of social organisations as part of the career pathways of data analysts and researchers. The [Social Impact Analysts Association](#) is leading the way here: but better links with, and representation on, other professional associations (such as [The SRA](#)) and brokerage organisations (such as [Pro Bono Economics](#)) will help to attract new skills and thinking into the social sector. Again, more showcasing, such as [this booklet](#) aimed at those in the social sciences, can help and **we need an intern/hacker/trainee programme to connect aspiring data scientists with social organisations.** This new generation of data scientists would form the nucleus of a new network of change makers in the sector who would aim to spread ideas and practice around data informed approaches. This could work with/in existing bodies such as PBE and the SIAA and the ESRC (see below), whose [capacity building work](#) around research skills is increasingly focusing on data and quantitative skills.

SR 6.6 We need to work with ESRC to connect academic researchers and data sets with social organisations. This could include the development of social sector [data navigators](#), whose role is to identify datasets relevant to social organisations and facilitate access and use. Otherwise, there are numerous examples of community-university partnerships (such as the [CUPP programme](#) at Brighton University) that might be the basis for skills development in the social sector.

Appendix: Practical information and support for individuals and orgs looking to assess themselves and/or deal with the issues raised above

- Are data really the new fuel for social change? Lucy Bernholz's Disrupting Philanthropy manifesto - <http://philanthropy.blogspot.co.uk/2010/03/open-philanthropy-modest-manifesto.html>
- What's the sector already doing about open data, and what is it? Nominet Trust's open data state of the art review - <http://www.nominettrust.org.uk/knowledge-centre/articles/open-data-and-charities>
- Is the social sector really using data to inform social change? <http://www.marketsforgood.org/>
- NCVO open data website - <http://data.ncvo-vol.org.uk/category/datastore/>
- Lamplight voluntary sector data store - <http://www.lamplightdb.co.uk/the-system/core-system/>
- Skoll World Forum: How can Big Data have a social impact? <http://skollworldforum.org/debate/how-can-big-data-have-a-social-impact/>

- Case Studies of good practice: see BIG/NCVO/Nominet open data day <http://bigblog.org.uk/2012/03/12/opening-doors-event-exploring-open-data-for-charities/>
- Tim Davies: Open Data Impacts <http://www.opendataimpacts.net/>
- GetStats: <http://www.getstats.org.uk/>

Getting help:

- Beth Kanter – networked non-profit website <http://www.bethkanter.org/the-networked-nonprofit/>
- Open Knowledge Foundation – School of Data <http://schoolofdata.org/>
- Making a Difference with Data <http://www.madwdata.org.uk/>
- Guidance on visualisation, from FlowingData: <http://flowingdata.com/>
- Big Data for Development: UN Global Pulse <http://www.unglobalpulse.org/>
- ESRC: Quantitative Methods Initiative <http://www.esrc.ac.uk/funding-and-guidance/tools-and-resources/research-resources/initiatives/qmi.aspx>
- Meetups, Data Dives, brokerage: DataKindUK <http://datakind.org.uk/>
- MySociety: <http://www.mysociety.org/>

Theme 7 - Enterprise Capability

The notion of “enterprise” means many things to different audiences. In discussion a number of alternatives emerged, in this context we have narrowed the scope - It is the **ability of social sector organisations to be innovative and creative in the connection of value provision and sources of money that we are terming “enterprise”**.

Broadly defining social sector organisations as “organisations that are capable of delivering social value”, clearly there is a **range of finance, both revenue and capital, available to them but this has changed significantly in recent times** with the change expected to accelerate. Statutory grant funding is under threat; public donations are at best flat and at risk of serious decline; contracting income has grown and there has been rapid growth in the still relatively small field of “finance for social enterprise” (eg loans; impact bonds; community shares).

The challenge is for **organisations to identify and tap into the source or sources of finance most suited to their mission and value**. It is a case of connecting value delivery potential in the right way with the right source of money.

Many organisations have an impressive record of delivery within a “project-funding” context and there is **no shortage of creativity and innovation in service delivery**, eking out finance, and doing a lot with a little. The evolutionary driver for many organisations recently though has been **project specific grant funding that neglected the development of organisational strategy and capacity**.

The adaptation to this project-funding environment brought some benefits, for example the focus on delivery quality, however, it also created a **culture focused on the short term and rooted in a dependency** on having the next project similarly funded. So, some of the most creative and innovative service delivery is from organisations that are not ‘enterprising’ insofar as they tend to be stuck in one mode of income generation. This can lead to organisations over-promising, under-costing and developing unrealistic expectations of delivery.

The more recent **drive for ‘full cost recovery’ led to** a requirement by funders for open book negotiations that stripped out everything that was not direct cost. This did not develop confidence about ‘pricing’ sustainable activity as the private sector can demonstrate so strongly. This led to innovation focussing on the urgent “must do” instead of fuller, longer-term strategy and **enterprising behaviour became focused on how to present projects differently** to secure further funding rather than **learning from effective interventions and building on them**.

This worked against the real need for organisations to **spend time and energy on the mechanics of the delivery process**; creating models and tools, designing and exercising processes and systems and keeping these going. In poorly capitalised charities such activity

draws in the people whose creativity and innovation would probably be better used for the more challenging aspects of meeting the needs of service users and investing in new ways of working. The drive to contracts is a continuing shift but **there is a place for effective grant funding that builds capacity and enables risky innovation.**

By creating a **more enterprising culture among organisations and funders**, we can unleash greater creativity in approach and improved rigour in management and planning across the sector. Improved delivery efficiency, greater innovation, openness to opportunities in new markets and more robust and sustainable growth can be achieved.

This is not simply a call for everyone to “become social enterprises”. Being ‘enterprising’ in a sector as diverse as ours lies in the ability of organisations to confidently do a number of things:

- To identify the **types and holders of income and development capital** best suited to their mission, situation, resources and aspiration,
- To be able to **develop and make compelling cases** to the holders of these sources of finance,
- To be able to **manage their responsibilities to the suppliers of the finance**, particularly when and if this is risk finance,
- To **adapt this model as the organisations develops** and/or circumstances change over time.

Social organisations have clearly managed this in the past but now the **proliferation of new sources of cash present both new opportunity and challenge**; more choices mean greater need to make well-informed, considered judgements as to what is the best solution. Being **agile and responsive in reacting to market changes is key to** having options and choosing and securing the best for an organisation now and tomorrow.

The contribution below has in mind a “small” organisation that is demonstrably having a significant impact, is led by enterprising people, but whose capacity to grow to the next level is constrained by lack of “enterprising” capacity and skills in the wider team. This is a critical place to start though much of our thinking is equally relevant to higher capacity players.

Key areas of opportunity and challenge

Organisations are hampered by a lack of enterprise skills and an environment where those skills that exist, and the complementary skills of creativity and innovation, have to be committed to “keeping the show on the road”. **The apparent inability to creatively identify and access alternative and better sources of revenue and capital finance degrades their ability to grow, innovate and plan to take their impact to the next level.**

A key skill of many charities might be described as “frugal innovation” which is applied to the everyday task of keeping work going – work that is often high value when seen from the perspective of beneficiaries (“they really care and help in many ways”) but which may be expensive when seen from a narrow service delivery angle (“you must not take more than 5 minutes with each client”). Frugal innovation aligned with a willingness and capacity to work with clients as “whole persons” rather than single-service users makes “social sector” organisations an enormously important resource and the challenge that we seek to start addressing here is to develop the skills and capacity that allows innovation and enterprise to be applied to developing new ideas and ways of working that go beyond incrementalism and that can be scaled up and/or replicated.

The issues that we have identified so far are:

- **Growth creates risk** - Organisations that achieve growth often lack awareness and skills to manage and mitigate the associated risks and, in a sector that is generally under capitalised, growth related risks are more acute than would be the case if there was a greater financial “buffer” and the senior management team had the capacity to be able to “stand back” from operations. The ability and time to take the “long view” would enable evaluation of a greater range of income and investment options. Greater ability to manage and govern the business would allow organisations to take on further delivery opportunities. This would allow them to create economies of scale, develop specialist skills and further reduce delivery risk.
- **Innovation is limited** - Organisations have less opportunity to be innovative when constrained by fund contracts and grant offers which detail aspects of project delivery activity in addition to contracted outcomes. More creatively structured funding would encourage efficiencies and innovation, particularly if surplus was considered a reward for delivery excellence and could be re-invested in things such as research and development. To take such an opportunity organisations would require the requisite skills; for example, pricing, risk management, financial modelling and management and revenue model development. With people so naturally innovative such liberation could be transformational for them and for society.
- **Grants as a single financing option** can instil short-term thinking and leave organisations vulnerable to change. Without the enterprise skills organisations find it a challenge to navigate the entirety of the funding landscape; perhaps by developing trading models, exploiting new revenue sources and financial instruments or exploring collaborations. Skills and methods honed over multiple projects can be lost to society when fund streams end and effectively close down operations. Freedom to act allied to the appropriate skills to act well would allow more organisations to thrive; retaining, developing and growing the ability to tackle society’s most challenging issues

- **Innovation can be too narrowly focussed** - Where innovation and creativity exists, and it does thrive across the social space, it is often focused on areas distant from the delivery of social value. It is applied to the mechanics of delivery rather than its quality and it is called upon when one is trying to secure next year's money or trying to squeeze more out of a limited budget. Creativity tends to be focused on the "make do and mend" of operations. By providing access to proven models there is the opportunity to expend creative energy in other areas; deepening and broadening impact, exploring revenue opportunities and models and so forth.
- **Time is an issue** – people have limited time to keep pace with the rapidly expanding marketplace for money. It is not just about new finance model, such as crowd funding, payment by results, community shares and social impact bonds, it also covers new potential "customers". Health service changes have created new financial powers; CCGs. Housing Associations are ever more willing partners of those delivering social value and corporates are beginning to look beyond simple CSR relationships as they seek to build supply chains which embody social value delivery. Understanding these and other opportunities takes time and energy, luxuries many do not have.

At the heart there is an opportunity to develop the skills and attitudes towards enterprise as defined as the **linking of social value delivery to the most advantageous source of money**. Examples of the skills include managing outputs (as opposed to inputs), identifying and mitigating risk, understanding transferable and adaptable core competencies and clearly identifying and articulating value, particularly within your own and partners value chains.

Strategic Recommendations

SR 7.1 Funders should be encouraged to change the way some or all of their grant finance is structured, awarded and evaluated as well as complementing the delivery of funding with targeted hands-on support.

To directly incentivise social purpose organisations to examine their skill base and practices and to develop the skills associated with enterprise (as defined herein) and allow them to focus on longer-term strategy, innovative approaches and higher-risk ventures. In so doing it will increase the resilience, efficiency and effectiveness of social impact delivery by making organisations more able to identify, assess and make effective and robust connections with the money they need to deliver and grow.

SR 7.2 Unlock the potential for "impact innovation and enterprise" by further developing a "marketplace of enterprise possibilities".

A space where proven types of connection and ways of working successfully can be showcased and introduced to charities and social entrepreneurs who can then focus their

creativity and innovation on implementing the model rather than developing it. We have in mind the example of “food banks” where the model of recycling donated food has been codified and supported with the necessary technical back up freeing up people to focus on making it work in communities.

There are existing models of this that could be supported, in an enterprising way, to deliver more widely to the sector.

SR 7.3 Leverage the Social Value Act

There is a connection between the drive toward intelligent commissioning, the Social Value Act and the way **social ventures are able to deliver social benefit across multiple agendas** and the complex issues that “beneficiaries” in most need face (e.g. delivering health outcomes while addressing crime and lack of access to employment). The ‘Whole-place community budgets’ pilots may provide good evidence to support commissioners recognise and **reward impact across all the multiple areas** that need addressing in a locality. This could be promoted by the Commissioning Academy and within other programmes aimed at improving commissioning for value.

Additional Recommendations

A number of funders might be encouraged to provide the resources required to:

AR 7.1 Further develop **local peer groups where learning needs and priorities can be discussed**, individual learning efforts supported by peers and skills can be pooled and shared. Sponsorship by and involvement of local and regional businesses would be encouraged. One such group has been formed by the many food banks operating around Northampton as a means of sharing learning and potentially pooling investment in enterprise.

AR 7.2 Develop a **small fund which will to allow staff to be backfilled while they learn** and to enable smaller organisations to access training normally associated with commercial companies. Engaging with commercial training also ensures individuals mix and make contact with people in industry.

Resources

Examples that illustrate the possibilities

It is a challenge for organisations to make the sort of transformation required. Organisations are time-poor and individuals are focused out of necessity on the day to day operations. Yet there are examples of successful transitions:

- A North West based venture (www.upturnenterprises.co.uk) is well on the way to a trading model after it took the decision to offer value added services to Housing Associations. By packaging up the services developed under grant schemes, such as business training, apprenticeships and work readiness, the organisation is able to offer end-to-end services which help Housing Associations deliver their own social agendas.

This imaginative connection of value delivery and “customer” delivers the social agenda for both parties.

- A Darlington based initiative has taken advantage of Personal Budgets to build a “pop up shop” model which provides disaffected children with work placement and volunteering opportunities (www.patchworkpeople.org.uk). This shift, effectively a move from low margin retail sales to a contracted service revenue model, has created operational freedom and has enabled the development of further services.
- An organisation focused on wellbeing and working in Runcorn has developed a service portfolio which will enable CCG operations to improve patient outcomes while reducing operating costs (www.wellbeingenterprises.org.uk). Greater operational flexibility has seen the introduction of new initiatives including exploration of social enterprise and franchising as service delivery options. CCGs need to explore ways to reduce costs; this connection creates that opportunity. The service delivery partner has the potential to take a strategic role for the CCG in this instance and thus be more valued and valuable.
- From a funding perspective, the Big Lottery is about to conclude a successful ten year capacity building programme in what is considered the UK’s least advantaged communities. In the Midlands, the Fair Share Trust has allowed local people to capitalise on their capacity for innovation through the creation of a development trust.
- Action for hearing loss (formerly RNID) were able to radically reshape the delivery of digital hearing aids by applying their enterprise skills and knowledge of users to the opportunity of managing NHS clinics in an innovative partnership with the Department of Health. This was a pioneering early example of this approach early 2000s
- Community Foundations are about to pilot exploring how people, within their 25,000 pa grantee base, with high potential ideas and models of operation can replicate their success. Each replication success will mean that a social entrepreneur or organisation will be able to focus their enterprise skills on implementing the model rather than developing processes. This has the potential to develop into a social franchise market place. www.the-icsf.org
- These examples have relied on the existing skills and attributes of individuals in the organisations, enhanced and given confidence by external support provision. Hence these are not case studies of what might happen in the future; rather they show it is possible given the right ingredients. These are examples of how innovation and enterprise may lead to new and mutually beneficial connections between value provider and source of finance.

Theme 8 - Collaboration in the Social Sector

The current configuration of the social sector owes more to history than it does to logic. **Collaboration, within the sector and across sectors, offers great opportunity for us to work flexibly and deliver better outcomes for our beneficiaries.** Inevitably, it will also become an increasingly central feature of our work if we are to continue to meet and enhance our objectives in an era of ever complex needs and scant resources. There are many examples of collaborations in the social sector, spanning activities including campaigning, fundraising, service delivery and central services such as HR and finance. As well as collaborations within the sector, there are many which cross sectors and involve public and private organisations.

Within the field, as a whole, there are a number of **examples of exceptional practice which can be drawn on to help us learn about key barriers and enablers to increased effective collaboration** and to develop an understanding of how the barriers could be overcome and the enablers supported and strengthened – Helping to drive the sector forwards to better achieve its aims.

We have made some recommendations on how more effective collaboration could be fostered and identified some resources that can be accessed to facilitate this.

Our contentions

Whilst plurality and contestability are important, **fragmented supply chains may lead to less holistic services, which fail to meet complex and growing needs** as effectively and efficiently as they might.

It may also be the case that collaboration in **fundraising at the local, national and international level may result in more net funds being raised** because it reduces total costs and increases confidence amongst donors. Similarly, it is recognised that organisations often have a stronger voice when they work together to develop and deliver campaigns.

However, **organisations have become accustomed to ‘competing’ in the sector.** In some cases, the culture of competition is deep-rooted and needs challenging with evidence that the alternative works (where it does). In other cases, the will exists but the circumstances inhibit collaboration.

Despite some of the practical difficulties, a strong case can be made for realising great opportunities through collaboration for the following reasons:

- coming together and **collaborating in more horizontal structures** can allow organisations to play to their strengths and work flexibly – something that is more difficult in a traditional ‘vertically integrated’ organisational model;

- collaboration can be **especially effective when dealing with multiple disadvantage**, where a number of different and distinct areas of expertise are required to deliver an effective and lasting positive change for beneficiaries;
- when organisations **collaborate to complement their respective strengths (and weaknesses)** and/or strip out unnecessary cost ('siloed working' often prevents organisations from forming supply chains to deliver more widely and effectively) greater value can be delivered;
- collaboration can be a **constructive first step towards beneficial restructuring** in areas in which normal market mechanisms (i.e. commercial - profit acquisition, expansion of customer base, removal of competitors) for merger and acquisition do not function but there is a fear that collaboration will end up in merger (when it need not).

Though collaboration takes place in different ways and at different levels it is more than usually **driven by the leaders of organisations and often depends, therefore, on their attitudes and skills**. We believe that challenges exist to effective collaboration and that these challenges are rooted in:

1. **Inclination** - leaders are sometimes attitudinally disinclined towards working with others;
2. **Understanding** – the added value of collaboration is insufficiently evidenced or understood;
3. **Opportunity** – with insufficient information about the sorts of collaborations that can take place and with whom;
4. **Skills** – individuals lack the skills whether in facilitation and/or negotiation to make the most of the opportunities that are presented.

Strategic Recommendations

SR 8.1 Overridingly, we recommend that we stop referring to merger in the same breath as collaboration.

One noticeable problem is that collaboration and merger are often conflated. Collaboration can often add significant value: it can be very effective for organisations delivering on their mission. Sometimes, it is less successful. Rarely, does it lead to merger. We contend that there is a risk that, in conflating collaboration and merger, collaboration is seen as a step towards merger rather than a proper end in its own right.

Attitudes

SR 8.2 We recommend that a mapping of existing leadership skills initiatives is undertaken with a view to identifying the extent to which these reference collaboration (and not merger) and, if necessary, bespoke modules developed.

For collaboration to take place, it needs to be driven by leaders with the right commitment: whilst changing beliefs is always challenging, attitudes can be shifted by exposing leaders to different forms of collaboration. Working in different sectors and observing the success achieved by other organisations working together can play an important role.

Inevitably, the issue of collaboration touches on other areas covered by this report including skills sharing and routes into and through the sector. Perhaps most importantly, it touches on the questions of organisational governance and leadership. For governors or trustees of social sector organisations, we know that asking the right questions is important: such as “are we the right organisation to deliver this?” and/or “is there another organisation with which we should be collaborating to achieve this?” Trustees need to be better equipped to ask these and other such questions.

Understanding

SR 8.3 The proposed “What Works” centres should be tasked with evidencing where collaboration works and does not.

Those with responsibility for driving strategy and shaping organisational behaviour need the resources to demonstrate the added value collaboration can bring and they need the evidence – both quantitative and qualitative to prove it. Case studies can be helpful here (see tools). Though there has been a considerable push to promote more effective evaluation of the impact of social sector interventions, more work could be undertaken to enable organisations to determine the ‘drivers of value’ and how this might be enhanced by collaborative working.

Opportunities

SR 8.4 Funders and commissioners should identify opportunities for collaboration through their programmes and support organisations to develop successful collaborations.

There is mixed but anecdotal evidence that collaboration is effective where it is forced whether by funders or commissioners of services. Funders should identify opportunities for collaboration through their programmes, for example by convening funded organisations, and support organisations to develop successful collaborations. Commissioners at varying levels should be supported to commission services more collaboratively, through the Commissioning Academy and Commissioning Masterclasses.

SR 8.5 We recommend that the leading infrastructure bodies are convened to consider progressing how they might more effectively create the opportunities for greater collaboration.

Infrastructure or umbrella bodies can play an important part in bringing relevant organisations together and providing the opportunities to discuss greater collaboration. Infrastructure bodies should consider ways in which collaborations could be ‘incubated’ and how appropriate incubators could be supported to identify/support nascent collaborations. Infrastructure/umbrella bodies should work collaboratively to develop, support and promote effective brokerage that is accessible across the sector. This could take the form of a ‘collaboration catalyst’ programme (see the box below for an outline of the services it might offer).

Resources

SR 8.5 A ‘catalyst programme’ might include:

- Mapping local/regional organisational “clusters” based around social issues such as worklessness, homelessness, etc.
- Discussions with organisations; exploring value and collaborative possibilities. Followed, where appropriate, by the brokerage of connections.
- Identification of possible collaborations with suggestions for finance to build collaborative offers and to support bid development.
- Access to key resources such as legal and contracting skills and knowledge.
- Discussions with local/regional commissioners to establish needs and gaps to inform collaboration discussions.

Skills and tools

SR 8.6 It is recommended that the leading infrastructure bodies collaborate to bring together the existing guides, remove references to mergers, and put these together in a “toolshed” to which others can add their own advice and case studies. Consideration should be given too as to how this might be enhanced by peer-to-peer learning. It should be noted that guides and tools support (outlined below) are useful but many of these cover collaboration and merger in the same editions.

In some areas of social provision, there are examples of effective collaboration which has been fostered by individuals whose specific function is to help bring about collaboration on the ground. A group of these individuals should be convened to help identify the key competencies required to deliver effectively.

SR 8.6 A compendium of guides should include tools to enable organisations to ...

- undertake self-assessment to understand the value of collaboration
- assess their market and their current business model
- assess other players in their current and prospective markets
- identify beneficial collaboration opportunities
- understand structures, risks and benefits of collaboration
- understand the financial implications of different levels of collaboration
- build effective business cases for collaboration
- keep collaborations under review for continued benefit
- withdraw from collaborations where they no longer offer benefits

Practical information and support

There is much literature and a good many resources on collaboration (which include many encouraging case studies). Some existing tools are referenced below

Useful guidance on collaboration (and mergers)

www.thirdsector.co.uk/go/charity_mergers/

www.ncvo-vol.org.uk/advice-support/collaborative-working/information-and-tools/jointworkingagreements

www.acevo.org.uk/Services+Resources/Partnership+Programme
www.thinknpc.org/publications/collaborating-for-impact/

www.knowledgepeers.com/staticcc/collaboration_talkingguide.html

www.charitiesdirect.com/caritas-magazine/getting-together-247.html

www.sayervincent.co.uk/Asp/uploadedFiles/File/Publications/MadeSimpleGuides/CollaborativeWorkingMadeSimple.pdf

<http://www.connectassist.co.uk/tag/collaboration/>

In addition, the **Charity Commission** has produced guidance as follows:

www.charity-commission.gov.uk/Library/chkcolab.pdf
www.charity-commission.gov.uk/Publications/cc34.aspx