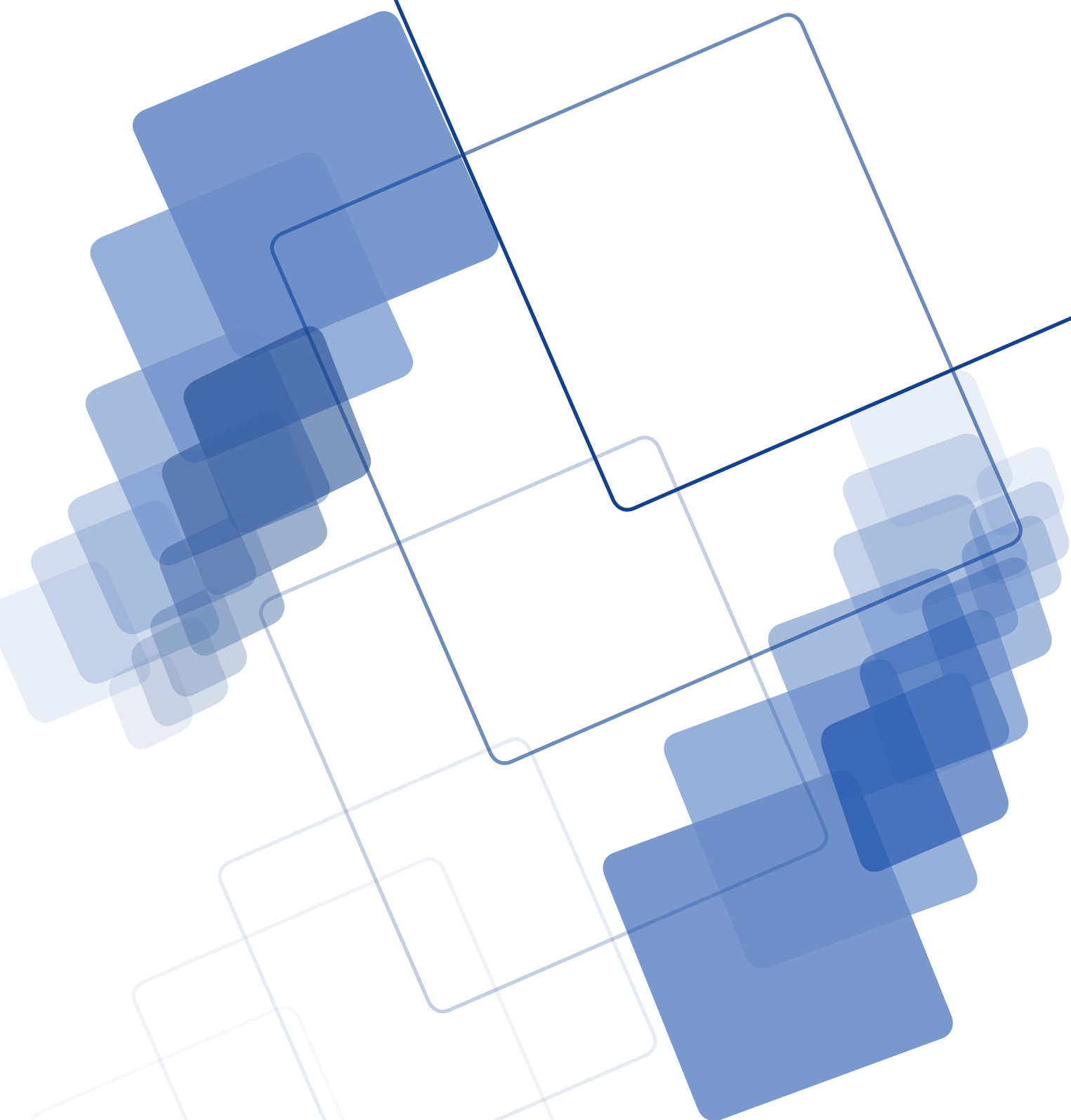


Norfolk Unites

- the one start shop for Norfolk Third Sector learning & skills





Norfolk Unites Development Report:

*Exploration of a Norfolk Third Sector
learning and skills consortium in the open
competitive tendering arena*

This project was part funded by the LSC and through ESF funding. COVER also contributed to the funding of specific aspects of this work.





Foreword

Welcome

I am pleased to welcome you to the Norfolk Unites development report, which represents the work towards a voluntary and community sector learning and skills consortium for Norfolk.

This report provides the spring board for presenting the key findings from the research, consultation and development work that has taken place since Unite 2 in January 2008, which followed on from early research and development work set out in the Getting Smarter Strategy for learning and skills development in Norfolk and the Unite Conference Report.

I am pleased that Community Connections as an organisation strongly committed to community learning, partnership and collaborative working, has been able to facilitate this work. However the key factor for the success of this work has been the strong commitment and energy of the people who contributed to the working groups and the organisations who supported their staff to participate. Without doubt the experiences and views of voluntary and community sector learning providers have been intrinsic, and embedded into the process.

The results of this are apparent in the report and the surrounding documents which have added value to the programme. We have also benefited greatly from support of key stake holders in the learning and skills arena on a national, regional and local basis.

We are further encouraged by the acknowledgement of the Government white papers and policies that recognise the value and the benefits that can be achieved through partnership working with the third sector and what the sector can contribute to national strategies and Local Area Agreements and targets. This consortium has a unique role to play at county level in linking and promoting regional and national opportunities where it matters most.

The testament to all the hard work and dedication attributed to this work in the last few months is this report which has successfully brought about the launch of 'Norfolk Unites'. Together we can make this a sustainable development.

Trish Aydin

**Chief Executive
Community Connections**

Acknowledgements

Community Connections is grateful to the following organisations for their contributions to this work:

ACER (Association of Colleges for the Eastern Region); The Learning Curve; Learning Together Cheshire and Warrington; South London Learning Consortium; GMCVO (Greater Manchester Centre for Voluntary Organisation); VOCOLLS (Leicestershire Voluntary & Community Sector Learning Consortium); Poole CVS; Great Yarmouth Community Trust; Niace; Norfolk Learning Partnership; Voluntary Norfolk; Meridian East; Workers Education Alliance; Norfolk Council for Voluntary Youth Services; The Garden Science Trust; United Response; Forward and Futures; Phillip Stone; Reepham Learning Community; Rainbow Nations; Community Music East; Move on East; YMCA Norfolk; Flagship Housing; Hertfordshire Training & Development Consortium; Cambridge Learning Consortium; Suffolk Learning Consortium; Learning SET; The Learning Partnership Bedfordshire & Luton; Paston Chase; Broadland Council Training Services; The Guild; TCHC; Norwich City College; St. Giles Trust; Norfolk COMPACT; Jim Church, Jobcentre Plus; Phil Dack, A4e.

Community Connections would like to thank the following individuals for their important specific personal contributions to this work:

- Nikki Bennett
- Howard Foale
- Andy Hodgson
- Stephen Howard
- Karen Sambells
- Jan Munn
- Phillip Stone

As the Norfolk Unites Development Co-ordinator, I would sincerely like to thank my line manager, Chrissy Chalmers, Training & Development Co-ordinator for Community Connections, for all her advice, expertise and patience.

Report written by Toby Cullingham, Norfolk Unites Development Co-ordinator.

Norfolk Unites Documents

All the documents below are available through www.norfolkunites.org.uk or by contacting Community Connections at: Electra House, 32 Southtown Road, Great Yarmouth, Norfolk, NR31 0DU.

- Norfolk Unites Development Report: (this document) summarising the work undertaken and recommendations made
- Norfolk Unites Learning Consortia Survey: full survey results
- Norfolk Unites Directory Report: needs analysis of commissioning agents and proposed template for a Norfolk Unites Directory, including considerations/ recommendations
- Norfolk Unites Quality Report: focusing on issues for providers, in relation to the Common Inspection Framework
- Norfolk Unites Discussion Paper: exploring the future landscape of developing learning and skills consortia
- Norfolk Unites Business Plan 2008 -2012

In addition, a full record of evidence accounting for the above discussion and work can be made available upon request

“The LSC recognises the contribution the voluntary and community sector makes and is capable of making, in helping to meet the needs of many of the learners the LSC serves and seeks to serve. Its strengths are in reaching people who see themselves as marginalised by formal institutions and statutory agencies.”

(21st century skills; realising our potential, DfES, 2003)

“The “client-centred” ethos of the VCS chimes with the LSC’s mission to put the learner first. At their best, organisations within the sector are practical, responsive, accountable, creative and resourceful, working to the highest standards...”

We need the (Voluntary and Community) sector’s expertise and flair in working with marginalised people and communities. We need that flair and expertise to raise their aspirations, increase their access to education and training and find different ways to develop their skills and improve their lives.”

(Working Together; a strategy for the voluntary and community sector and the Learning Skills Council, LSC, 2004)

“Partnership – the public, private and third sectors working together guided by our future will maximise the innovation in all sectors, leading to more and better outcomes. Our priority will be to contract on the basis of what works best to support people into work.”

(Reducing Dependency, Increasing Opportunity: options for the future of welfare to work, Freud, 2007)



Norfolk Unites: Our Core Values

- Committed to partnership and collaborative working
- Championing cross-sector recognition of Norfolk Third Sector learning and skills provision
- Actively seeking learning and skills opportunities
- Dynamic information exchange
- Open; Transparent; Fair; Inclusive and; Equal – COMPACT compliant
- By the members, for the members



Glossary

ACER – Association of Colleges in the Eastern Region

BME – Black and Minority Ethnic

CIC – Community Interest Company

COVER – Community Forum Eastern Region

CPD – Continuing Professional Development

Discretionary funding – For example, ESF monies to fund specific programmes targeting work to support perceived priority groups at a given time

DWP – Department of Work & Pensions

EEDA – East of England Development Agency

ESF – European Social Fund

ESOL – English as a Second or Other Language

FE – Further Education

LID – Local Intervention and Development fund⁴, ESF (see ESF) grant

LSC – Learning and Skills Council, body responsible for distribution of Further Education monies, to colleges, voluntary and community sector etc.

MIS – Management Information Systems

OCT – Open Competitive Tendering

PQQ – Pre Qualification Questionnaire, a process which determines whether an organisation is fit for purpose to apply for an LSC contract

Third Sector – Voluntary and Community Sector to include social enterprises and activity contributing to the voluntary and community sector

VCS – Voluntary and Community Sector

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Key Recommendations

(Full list of key findings and other recommendations available in sec. 7)

1. Pilot the Norfolk Unites consortium in the period October 2008 – March 2009 supported by a part-time Co-ordinator.
2. Form a Steering Group of members who will task the Consortium Co-ordinator and to whom the post shall be accountable – managed by the lead body organisation.
3. Adopt a 'lead bodies, contract responsive' approach.
4. Adopt Terms of Reference (to include Vision; Impact Statement; Core values; Objectives) as proposed in this document.
5. Engage stakeholders and contract holders of all sectors delivering in Norfolk to forge positive cross-sector working relationships.
6. Promote Norfolk Unites to ensure all Norfolk Third Sector organisations of all geographic and thematic areas are aware of the opportunities afforded by Norfolk Unites. Map member organisations and identify gaps in relation to geographic and thematic spread and seek to engage groups from under represented areas.
7. Engage Third Sector organisations outside of Norfolk to provide effective Third Sector regional working in terms of achieving/accessing contracts offered by the LSC, Jobcentre Plus. Providers from within the eastern region Third Sector to present themselves as a united provision under the auspices of 'the eastern region Third Sector consortium (of providers)' to add weight to lobbying ability and potential influence with key regional bodies such as ACER and EEDA.
8. Promote and facilitate joint bidding and partnership work for learning and skills opportunities as appropriate on local, county and regional levels.
9. Encourage lower management operated in relevant learning and skills delivery contracts through the Third Sector and appropriate strategic funding bodies more effectively requesting contract holders of all sectors to deliver contracts at or close to recommended 20% maximum management costs to enable greater numbers of beneficiaries to be supported by those programmes; to include monitoring of actual engagement with Third Sector organisations named as partners on applications.
10. Promote fees to be paid to Third Sector organisations for referring individuals to appropriate learning and skills programmes to increase engagement of the Third Sector and to ensure target interventions of contract holders are met.

The LSC report '**Working Together**', also released in 2004, aimed to promote better working between the LSC and the VCS and to ensure the VCS was able to suitably contribute to LSC programmes. It felt consortia was a most effective tool for this.

1. Introduction

Why a Norfolk-wide Third Sector learning and skills consortium?

The Norfolk Unites development work from January 2008 – September 2008 set out to explore the development of a learning consortium for the Norfolk Third Sector. This development work was supported by the Learning and Skills Council (LSC) to enable the Third Sector to better react to funding opportunities as offered by strategic funding bodies, such as the LSC and Jobcentre Plus, and to maximise the contribution of the Third Sector to the relevant Programmes.

Throughout the work, there has been an issue of identity over whether the work is for the Voluntary and Community Sector (VCS) or Third Sector. Bodies such as the LSC wish to engage with the VCS as that is where the priority groups are engaged at the grassroots level, whereas recently a Third Sector approach has emerged, utilising social enterprises and a more 'holistic view' of the VCS to achieve desired goals. Where the emphasis in this work has been on Third Sector, there will be occasions where VCS in its purest form is referred to by various stakeholders.

The Third Sector has been acknowledged as a vital mechanism for enabling regional and national economic and development strategies to engage with and support perceived priority groups. Working with these priority groups (such as the economically marginalised) has been the Unique Selling Point (USP) for the Third Sector.

This recognition of the importance of the Third Sector has been highlighted by the **'Freud Report' "Reducing Dependency, Increasing Opportunity: options for the future of welfare to work" (2007)** which advocated a greater use of voluntary (and private) sector resources and expertise so harder-to-help benefit claimants receive more employment support. It emphasised the importance of the voluntary sector to contribute positively to employment related initiatives which again highlights the importance – the duty, even – of the VCS to effectively organise itself in order to respond to this need.

'Releasing resources to the front line - Independent Review of Public Sector Efficiency' ('The Gershon Report') of 2004 looked at aggregation of procurement services as a means of increasing efficiency. This has resulted in Government preferences for larger, collective procurement process, translating into the regional and county-wide emphasis on contracts offered by the LSC and Jobcentre Plus in the fewer, larger contracts approach.

"A...(voluntary sector)...consortium approach can benefit the LSC by providing a single contracting and reporting point, assuming day-to-day monitoring and quality assurance on its behalf. Many local offices have made it clear their preference for this sort of arrangement."

(Working Together, LSC, 2004)

The release of the influential '**Leitch report**' ('**Review of Skills: Prosperity for all in the global economy – world class skills, 2006**') which set out measures to upskill the British workforce has also been at the core of the recent Government learning and skills drive.

In response to these recent drives, development work on learning consortia for the VCS was undertaken across the eastern region in the period 2007/08, supported by the COVER (Community and Voluntary forum – Eastern Region) VCS Skills Strategy Manager – Eastern Region. It was anticipated that this development work across the eastern region would enable the Third Sector to increase its chances of gaining the relevant contracts and develop methods for effectively managing contracts with a number of providers.

Norfolk Unites was the development work towards a Norfolk Third Sector learning and skills consortium in this period.

The history of Norfolk Unites

Norfolk Unites was built upon numerous previous research and consultations:

"The development of a county learning and skills strategy must be rooted in work that has been developed over a number of years."

(Getting Smarter, The Guild/NVS, 2006)

Norfolk Unites has sought to ensure this has been the case, acknowledging the significance and worth of work previously undertaken.

'Developing Voluntary Sector Learning Structures for the Voluntary and Community Sector' (Development Etc./Vsipd, 2006), the follow on consultation document, helped inform and lead into the 'Unite' conference.

'Unite' was held in March 2007 to raise awareness and prospect of a Norfolk-wide VCS/Third Sector learning consortium and seeing who would like to be involved, or are least be kept informed of developments.

Continuing this work with 'Norfolk Unites', Community Connections sought to ensure that relevant work up to this stage was, indeed, utilised, and progressing the activity to a place where Norfolk Third Sector organisations would start to feel the physical benefits of that past work. The 'Unite Report' had set out a plan for continuation of this work and it is these recommendations which were taken by Community Connections in Norfolk Unites.

2. Development Phase

Overall development phase plan

Community Connections took up the recommendations of the Unite Report to facilitate a development phase whereby working groups would operate in 5 main areas:

- Communication & Engagement
- Finance
- Legal
- Model
- Quality & Systems

Each of these working groups would tackle the issues relevant to that area of working and inform how a Norfolk Third Sector learning and skills consortium could operate and what its functions should be.

Unite 2

The Unite 2 event was held in January 2008 aimed at raising issues to be further explored in the development work for a Norfolk Third Sector learning and skills consortium and identified those organisations who wanted to be a part of the working groups process. Its aims were to:

- Refresh previous awareness and information events regarding developing a learning and skills consortium for the Norfolk Third Sector
- Raise awareness of the current funding context within the learning and skills arena
- Identify questions and issues relating to this development work
- Enable organisations to put themselves forward to be further involved in this development work through the working groups

Information gathered at Unite 2 helped inform the context and agendas of the 5 working groups. 56% of delegates signed up to be involved in those working groups. At this event, delegates voted for their preferred 'brand' from which the name 'Norfolk Unites' emerged. In the evaluation of the event, delegates recorded an overall satisfaction score of 96% (av. 4.8 out of 5):

"I feel part of the process and not led."

(Unite 2 delegate)

"Gave us a great deal to think about. Perspectives were very well balanced, pros and cons. Got us thinking from all angles."

(Unite 2 delegate)

Learning consortia survey

(see separate 'Learning Consortia report' for full responses)

Introduction

In order to inform and support the working groups, the Norfolk Unites Development Co-ordinator conducted interviews with a number of learning consortia. Contributions were requested through the Consortia+ network (network of Voluntary and Community/Third Sector learning consortia) and other consortia were also contacted directly through website research. From these, the follow learning consortia agreed to support us in this work:

- Learning Plus – Devon and Cornwall Learning Consortium
- The Learning Curve – Wiltshire Learning Consortium
- Learning Together Cheshire and Warrington – Cheshire and Warrington Learning Consortium
- South London Learning Consortium
- GMCVO (Greater Manchester Centre for Voluntary Organisation) – the lead body for the Greater Manchester Voluntary Sector Learning Consortium
- VOCOLLS (Leicestershire Voluntary & Community Sector Learning Consortium) – Leicestershire Learning Consortium

The following organisations also contributed a response:

- Poole CVS
- ACER (Association of Colleges for the Eastern Region) by way of response from an ACER Approved Project Manager overseeing a current ACER contract.

Overall brief profile of consortium

To enable honest responses to be recorded consortia responses are labelled by number not by name.

Consortium 1

- Originally started in 2005 with LID money.
- Difficulties in trying to accommodate all needs – agendas from individual organisations stunted progress. Changed to a lead body (us) to drive it on.
- A membership prospectus and business plan prepared on basis of there being LSC Preferred Provider Status, but this does not exists now. OCT (Open Competitive Tendering) has resulted in us having done all that work and not being able to really use it.

Consortium 2

- Started in 2001, from 2003 as now.
- We have 35 members, 15 we fund as providers.
- We deliver about £1 million FE mainstream funding.

Consortium 3

- Started off as informal network in 2000 based on a cross-cutting review, an LSC report for the VCS.
- Steering group formed with TEC legacy money, funding a development worker.
- LID fund of £40,000 in 2003, using consultants from the sector in Yorkshire who had worked on learning consortia before.
- We also had £200,000 from ChangeUP.

Consortium 4

- Was an ESF project from 2005.
- We are a CIC with about 107 members, delivering Train to Gain under mainstream.
- We deliver IAG, ESF, Skills for Jobs, Entry to Employment and other LSC work to support other consortia in our region.

Consortium 5

- Originally set up in 1998 but did exist as a training network previously.
- We deliver FE mainstream.
- Learning consortium is part of what we do.

Consortium 6

- Started in 2000, 2002 with funding on development.
- Working with FE, private, training workshops etc.

ACER

- Originally a member organisation for Eastern Region Further Education Colleges.

Other

VOCOLLS also reported being part of the East Midlands Learning Consortium – Nottinghamshire, Derbyshire, Northants, Lincolnshire, Leicestershire have combined over the last 18 months, 2 years. They take turns to lead, going for regional contracts, such as the Winter/Spring 2007/8 ESF round.

Key findings/issues

- Impact of communication of information seen in one consortium to enable £900,000 of additional funding being attracted by members being made aware of specific opportunities.
- No non-VCS members of consortia, though one had facility for associate members as non-VCS (although no actual sign-ups).
- 67% reported strong relationship with FE – all share info/work with non-VCS.
- 67% hold members only areas, with protected information being linked to specific contract information.
- No consortia recruit for 'gaps' unless focused on a particular contract and need a specific target group for that contract.
- 50% are established consortia delivering mainstream delivery, another 33% hold Community Grants.
- 50% reported submitting ESF applications on a regional partnership approach with two or more other learning consortia in their region. The East Midlands Learning Consortium is being set up in response to the shift to the regional climate, linking Third Sector learning consortia in that region more effectively together, promoting joint provision etc.
- With Open Competitive Tendering it is 'natural' that people may want to be part of multiple bids. It was felt that individual organisations need to be enabled to seek the appropriate route – by themselves, with smaller informal partnership or as the consortium. A need to be open.
- 83% reported members are board.
- A need to be independent so that there are no conflicts of interest between the lead body/consortium and providers but where the consortium was as a lead body (not separate legal entity) there was felt the need to lead on behalf of members.
- Of the learning consortia, 33% were lead body and 67% separate legal entity. Of the separate legal entities, 1 was a CIC (Community Interest Company), 2 were charity and company limited by public guarantee and 1 was company only. Of the 50% of consortia who did not hold larger delivery contracts, these accounted for the 33% as lead bodies and one (17%) in the legal entity. Of the 50% who did hold a larger delivery contract, all were separate legal entities.
- 83% reported no organisation of 'clusters' of like-minded groups.
- Consortia relied on members filtering information to their networks.

- Quality is a major issue and a lot of work has been done on this, one consortium reported 60-70% of their work is on this. Initial risk assessment of eligibility therefore is seen as vital.
- Consortia who did not deliver larger contracts had reported using Access and Excel type recording methods. Of those who used MIS (Management Information Systems), TERMS was used by 1 and LearnerTrack by 3. One consortium pays for LearnerTrack to also data input all the data – this worked out as more cost effective for them than having a member of staff to do this.
- Framework for Excellence seen to be important for the future.
- Learning Aims Database is where the LSC funding is.
- Large amounts of LID money (average of about £500,000 each over 2-3 years) had been available to enable those consortia delivering mainstream learning to establish themselves.
- An average of 15-20% reported for management fees, whereas it was reported that average FE management fee was 37%. Management fees will pay for delivery of that contract, not wider services such as CPD etc. Members of learning consortia previously had benefited from CPD as part of the larger LID funded packages that were available.
- ACER maintains financial viability by only bringing in members of staff on basis of achieving specific contracts.
- Increasing emphasis on the need to effectively line up with regional working as regards applying for LSC contracts – e.g. East Midlands Learning Consortium.
- ACER use regional influence to effectively lobby LSC, EEDA, Regional Skills Partnership – if the Third Sector wants to compete against the FE, it would need to consider a similarly effective regional visibility.
- CEO, quality manager and an administration worker were perceived to be minimum staff required for contract management in consortia.
- Risk is passed down by contracts to providers. This is reflected in contracts delivered by all contract bodies which are a % up front and a % upon successful completion of outputs.
- Contract holding bodies and providers will need to have stable cash flow – they will be doing work which they haven't yet been paid for.
- There are two types of consortia – those which deliver and those which support their members e.g. CPD.
- Identity is essential.
- 'It is no picnic' said one consortium.

- 6 week procurement cycles – need relationships and expertise in place.
- Will the VCS compete or link with FE?
- Will not go back to individual provision – Gershon report. County size at the very least.
- ‘Shape should be based on demand rather than creating something for the sake of it.’

3. The Working Groups

An overview

The development work revolved around four working groups:

- Model
- Communication & engagement
- Quality & systems
- Finance & legal

Working groups consisted of cross-sector representatives who were keen to progress the work of a Norfolk Third Sector learning and skills consortium.

Responses from the learning consortia survey (see previous section) were fed back into the working groups. The working groups also directed the Norfolk Unites Development Co-ordinator to undertake further research to inform discussions. Additionally, a 'project' would be commissioned for each of the working groups to further explore an issue.

Between sessions 1 and 2 (around March 2008) the results of the LSC ESF round came out which resulted in a seismic shift in the way in which Norfolk Unites viewed its work. Regional contracts had been awarded to FE colleges and the Third Sector had been completely marginalised in that process as the contract shift from individual, local delivery (as previously experienced by Third Sector – and other – providers) to larger, regional contracts was felt with full force. This necessitated a change in emphasis in approach which conflicted with some of the preparation work laid out in the first sessions. This was not without its difficulties, as one member from the Communication & Engagement group succinctly put it:

"The goal posts have not so much shifted, as are we still even playing football?"
(Working Group Member)

By and large, working group participants were able to work within this shift and were able to produce some key recommendations that would enable the work of a Norfolk Third Sector learning and skills consortium to progress.

Finance & legal

The finance and legal working group was tasked to focus on the financial and legal aspects, to explore the commercial viability of a consortium and what legal nuances would need to be clarified. This group enabled the other working groups to work within the parameters of what was physically possible, either financially or legally.

- How many Third Sector organisations have passed PQQ and how many Third Sector organisations have (recently) delivered LSC contracts? What is the potential market for a learning consortium?
- Added to on-costs, felt £150,000 would be needed to run a consortium, as a ball park figure. At 20% management fees, would need to get in £750,000.

The following PQQ mapping was produced. This looked at organisations in the East of England who had achieved PQQ for the winter 07/08 LSC ESF round, what sector they worked within and what the county of working was. A follow-up exercise was conducted of Third Sector organisations within Norfolk, identifying of those who had PQQ, who had actually applied, given the regional focus of those contracts.

PQQ mapping

Eastern Region PQQ holders



County	Statutory sector (FE, HE, local authority, adult ed.)	Private	Third Sector
Beds and Luton	8	3	17
Cambridgeshire and Peterborough	6	12	16
Essex	14	14	7
Hertfordshire	11	7	13
Norfolk	7	12	13
Suffolk	10	7	9
Regional/national body	8	10	5

Norfolk PQQ survey

Of 13 Norfolk Third Sector PQQ holders, 9 replied to a request for information. Of those, 4 applied for a contract (45%) and none were successful. Across the eastern region, 36 Third Sector organisations applied for contracts. If 80 Third Sector organisations achieved PQQ (from table above), this means 45% of Third Sector organisations across the eastern region holding PQQ applied for contracts, which directly correlates with patterns in Norfolk. Although issues of 'what is Third Sector' could be interpreted differently by LSC compared to this work, it is clear that patterns of contract application are at least similar in this sector.

A 'league table' was produced of learning consortia development per region, which showed the Eastern Region firmly at the bottom. This could have a bearing when it came to regional support required/offered.

Learning consortia development by region

The results below come from the map of learning consortia development produced by Niace, spring 2007.

1) London

Well established	2
Getting established	1
Early stages of development	0

2) South East

Well established	2
Getting established	1
Early stages of development	0

3) North East

Well established	2
Getting established	2
Early stages of development	0

4) Yorkshire and Humber

Well established	2
Getting established	1
Early stages of development	1

5) East Midlands

Well established	2
Getting established	1
Early stages of development	2

6) North West

Well established	2
Getting established	1
Early stages of development	2

7) South West

Well established	2
Getting established	1
Early stages of development	3

8) West Midlands

Well established	0
Getting established	3
Early stages of development	2

9) Eastern Region

Well established	0
Getting established	1
Early stages of development	5

A survey was also carried out as to potential provision into a Norfolk Third Sector learning consortium:

Norfolk Third Sector provider mapping

- There were 9 responses.
- 6 had delivered before on an LSC/Jobcentre Plus contract (66%), 3 had not (33%).
- 33% of the organisations were able to offer courses as available on the Learning Aims Database and 66% could not.
- Larger providers did not respond to the request for information. The numbers offered by organisations were variable. The total numbers given have not been recorded here as a misrepresentative figure would have been given (e.g. 500 learners was given by one respondent for short/one day courses not on the Learning Aims Database whereas a figure of 50-60 learners was given by another respondent for a full NVQ).

From the above, it was felt that a learning consortium, in the traditional sense, was not financially viable for the Norfolk Third Sector.

To debate legal structures, 12 models of consortia, as proposed by the Norfolk Unites Development Co-ordinator, were put to the group and discussed using SWOT analysis – see minutes for full details. In summary, it was felt that a flexible approach would be required, thinking cross sector and cross-region as and when issues arise and not purely focused on contract management.

Commissioned additional work

A member of the Finance & Legal working group was commissioned to produce a Business Plan for Norfolk Unites. This set out a process to be undertaken in the period October 2008 – Mar 2010, presenting a business case to potential funders and members alike. This document is available separately.

Key issues/findings

The following key points were highlighted by the group:

- Deliver locally, work regionally.
- Needs flexibility – seen as critical.
- Not to be reliant on large chunks of grant funding and especially not to be reliant on LSC funds to support the work.

- Needs commitment from providers and other counties/regional.
- Decision-making role for members is important.
- Requires influence/lobbying role – e.g. ACER (Association of Colleges in the Eastern Region – network of FE colleges in East Anglia) and Shaw Trust meet with Ministry of the Third Sector, EEDA (East of England Development Agency) etc. and seek to influence contracts that come out. We would need a similar intent to be able to compete.
- Unless the consortium is intending to hold those larger LSC and Jobcentre Plus contracts, it was not felt the necessity to set up the consortium as a separate legal entity.
- Has to be a vehicle for regional and this needs to be followed through, not just recommendations in a report.

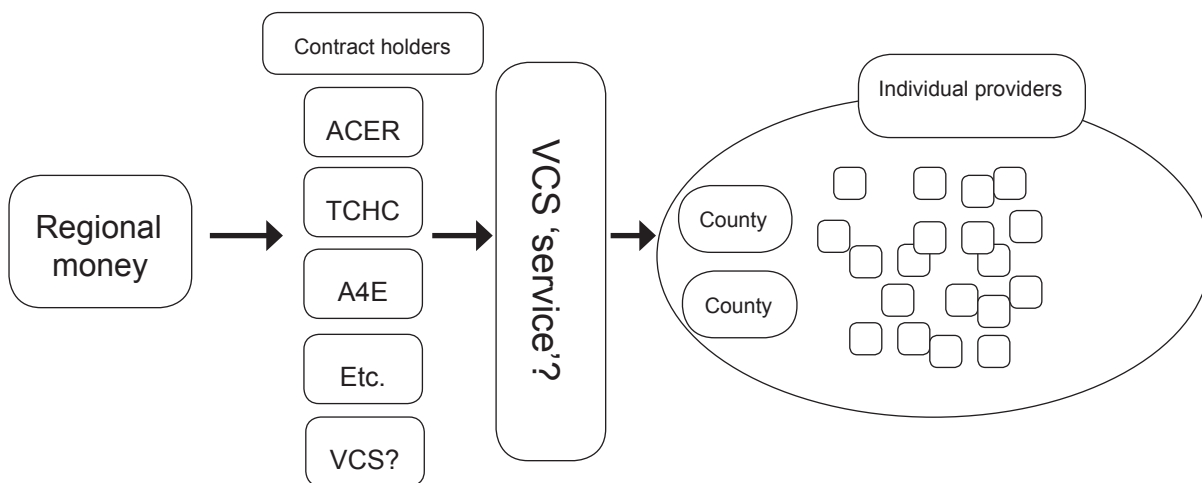
Overall, a need to be:

- Practical
- Realistic
- Financially attractive

Model

The aim of the Model group was to provide the 'vision' and ideas. A proposal was put forward that instead of a legal entity or lead body, we should look at 'lead bodies'. In this, there would be a 'loose confederation of members' with a common secretariat/project manager. Openness and sign-up would be important here e.g. Membership agreement. The lead bodies approach recognised that expertise/experience already resided within constituent members and that it was financially difficult to sustain a consortium core staff team – an appropriate lead body would go for the appropriate contract on a case-by-case basis.

At the moment, the 'vehicle' for getting regional money to the providers is perhaps 7-8 contract holders. Therefore the model could be seen as:



Steps for how the eastern region Third Sector should put together regional bids and also what would be needed to manage regional contracts are contained in the full minutes.

Opinions of the direction of the Norfolk Unites work were sought through a 'soundings survey' of relevant stakeholders:

"Although contract winners are sub-contracting with smaller providers, including the voluntary sector, the steer and the choice of sub-contractor will be coloured by the ethos of the traditional prime contractors who have often been selected because they feel safe to awarding bodies."

"Contracts are (inevitably) dominated by FE and I'm not sure that FE is always the answer to the region's employment and skills needs."

"We frequently end up working with the same few organisations...An effective webpage which contains simple but concise details is a godsend!"

"I think VCS should approach the situation with confidence in their strengths, but retain an awareness of the direction that public policy is moving in. The irony is that as governments recognise increasingly (and cross-party) the need for intervention through social policy, the more what was the remit of partially funded third sector organisations will become a market for commercial organisations.

VCS strengths are seen as:

- Engaging hard to reach customers who may not be accessing statutory services
- Specialist support for individuals with multiple barriers before they reach the point of re-engaging with employment and skills
- Having knowledge about local people, local opinions, local employers, local barriers in a way that commercial company struggle to replicate – and local as in Swaffham and Sea Palling, not local as in Norfolk!

Accentuate these strengths and acknowledge any weaknesses you do have – the honesty is refreshing in a cynical commercial world."

"It is our experience that the Third Sector is not fully aware of the required Ofsted quality levels!"

"We see a future whereby there could be several different models working concurrently for different projects... At the end of the day it is the learners that are the most important consideration"

Key issues/findings

- This is not a spoon feeding exercise for provider organisations – needs to be dynamic, requires commitment, quality/delivery standards to be met.
- Control of destiny and management fees. Commercially you get away with what you can get away with, wouldn't it be good for the VCS to be in charge of this and not be subject to unknown management fees? Private, FE organisations win contracts because they are the preferred option of strategic funding agencies – we (the VCS) are, however, delivering to those target groups, so how can we improve our

professional approach to be seen to be capable of holding those contracts in the first place, especially across the eastern region? It needs more cohesion, organisation and more ambitious thinking than previously.

- We are seeking to create a river, not a building as far as our Norfolk consortium is concerned.

Communication and engagement

The Communication and Engagement group was tasked with looking at the communication and engagement issues and ensuring the processes proposed were open, transparent, fair, inclusive and equal – namely that they were COMPACT compliant. Meeting was held with the Norfolk COMPACT Officer prior to proceedings to receive advice on proposed Norfolk Unites processes.

Key issues/findings:

- All Norfolk Third Sector networks were given the opportunity to engage with Norfolk Unites. However, engagement in Unite 2 and the working groups was not as evenly spread across the various geographic and thematic areas as it could have been. How do we effectively engage groups from all geographic and thematic areas? Meeting at grassroots level, meeting them face-to-face – would need to be a priority for the consortium proper.
- Production of the Norfolk Unites website was a key aspect of the Communication and Engagement front, making all relevant information easily accessible. Organisations on the Norfolk Unites contact list were automatically alerted if any update was entered to the website.
- 'Information fatigue'. Members regularly receive e-mails containing masses of information sent out to dozens of recipients and it was felt that it was sometimes difficult to discern what was relevant and what was not. All too often members said they ignored items that perhaps were vital for them to be aware of. Promotion of 'clusters' where relevant information went to the relevant people to be explored.
- To enable Norfolk Third Sector organisations to 'be on the radar' (of contract holders) and 'in the know' (as regards access to relevant information) it was felt that a Directory was required.
- Ensure the functions of the consortium are clearly articulated – what is its Unique Selling Point?
- Need to engage effectively with Norfolk Third Sector and relevant stakeholders.

Commissioned additional work

A tender was made for the production of a Norfolk Third Sector training Directory. In summary, a demand analysis was conducted of commissioning agents to ascertain the information of providers that they would like to find in a Directory. On the basis of this, a template was produced enabling providers to market their service more fully than simply 'course name' and contact details. Therefore, a more holistic, fit-for-purpose directory will be able to be produced to better engage appropriate stakeholders. This report is available separately.

Quality & systems

The Quality & Systems group was charged with the responsibility of exploring issues relating to contract management and quality processes contained within the consortium. The work of this group was particularly affected by the changing learning and skills funding landscape as presented midway through the project. The realities of actually holding the contracts became apparent and instead of setting up a step-by-step approach to contract management, a more flexible approach was perceived to be required.

Key issues/findings:

- LSC funding going to local authority for 16-19 affects the FE more than it does the VCS. Even then delivery may be within clusters of local authorities, so in the 16-19 bracket the consortium will still need to consider partnership working beyond Norfolk.
- ACER – we could work better with them in partnership (e.g. against private contract holders), providing them with a more coherent, organised outlet than previously and in doing so possibly be able to negotiate lower management fees than we have had to cede to such contract holders previously.
- Need a clear process laid out. What will the contracts be, can we get 'ahead of the game here' instead of continually reacting as a sector? Quality requirements are seen to be crucial.
- Performance related payments means that work is paid in split terms, a percentage initially and the final percentage upon successful completion of intended outputs. This could present a cash flow burden upon the consortium (and of their providers) in doing the work first and being paid later.
- MIS were seen to be required for larger contracts. LearnerTrack was the software most recommended by other consortia.

- Consideration of outsourcing data inputting to the MIS organisation:

"We pay LearnerTrack to do the entire inputting etc. – enrolment, registration on course and completion. It is their business to get it right and cheaper for them to do it than for us to employ someone of our own to do it. They send reports etc. and we approve them, then send to the LSC. We can pull off management records as and when."

(Learning consortia survey respondent)

Working group feedback and evaluation

Evaluations were undertaken of the working groups to canvas whether people felt it had been a valuable process:

- Preparing: materials made available etc. – 89% customer satisfaction
- Reporting: accuracy of minutes and prompt availability of these – 91%
- Develop ideas: how attendees have felt able to explore ideas – 85%
- Impact of input: how attendees have felt able to contribute, have opinions listened to – 91%
- Results: how attendees felt intended outcomes were achieved – 72%
- Overall satisfaction: Overall perception – 65%

4. Added Value

Introduction

Whilst it was intended that the Norfolk Unites would be feasibility and development work, it became apparent that there was a need to provide a service as demand arose. This gave us the opportunity to put some key ideas into action. The following actions occurred in order to support this process of developing a consortium.

Events and continuing professional development

- Train to Gain. A training awareness event, funded by COVER, was held in April to enable Norfolk Third Sector organisations the chance to find out more about Train to Gain and also the new tutor requirements, re: Preparation to Teach in the Lifelong Learning Sector.
- Funding obtained through COVER enabled a PTTLS course to be organised by Norfolk Unites.
- Delivery of contract management training (for organisations wishing to hold contracts and potentially contract manage other providers) and provider training (for individual providers, informing them of how to meet the common Inspection Framework etc.) was organised by Norfolk Unites, bringing in Learning Plus, an established learning consortium from Devon and Cornwall, to deliver this training over 2 days.

Brokering, facilitation, signposting of contract opportunities

- DWP Flexible Routeways Provision contract, taking information from members to a regional meeting of DWP Prime Contractor applicants. Upon notification of who had won the contract, Norfolk Unites met with the contract holder on the members' behalf to scope out the service offered. By placing this information on the website in an easily understandable format and encouraging members to send this link to other organisations they felt could benefit from knowing about this, this enabled members the best opportunity to engage with the programme. This approach meets the Norfolk Unites Impact Statement, with it not being essential for Norfolk Unites to hold the actual contract with which to have the desired impact:
- We will increase life opportunities offered to the Norfolk population through learning and skills
- We will improve the competence and opportunities of Norfolk Third Sector organisations to deliver the impact above

- We will present a responsive, credible, efficient and cohesive delivery mechanism to deliver to objectives set by strategic bodies
- ESF LSC contracts. Sourcing contract leads and putting Norfolk Unites members in touch with them. In a lobbying facility, suggestions were offered by the Norfolk Unites Co-ordinator to the production of such bids in the hope that this would afford a better deal for Norfolk Third Sector providers.

Information, communication, representation

- Gap analysis of networks to identify networks that should better link together. Member attendance of the Norfolk Skills For Life working group at the regional working group was supported by Norfolk Unites.
- Regional meetings. Attendance of relevant regional meetings and events, ensuring the interest of the organisations involved in Norfolk Unites were represented.
- Providing an information flow from national and regional down to individual providers, informing members in easily understandable/ accessible format of developments which may be of interest.
- Awareness – high take up (proportionally, when assessed against other counties) of regional funding/training opportunities by Norfolk organisations due to effective Norfolk Unites information channels.

Potential additional services

- Training Needs Analysis toolkit – completed a previously partially completed toolkit especially for TNA in Third Sector organisations that will be available as an additional service to members should funds be acquired for this and should members desire this service.

All the above points represented a potential service which members could benefit from in a real and working consortium.

5. Website Analysis

Unique visitors

E-mail alerts sent out to the contact list included summaries of the news item. The number of unique visitors – that is the different people who are entering the website to access this information in full – has steadily increased. In July this had reached 222 in that month.

With only 69 user profiles registered on the e-mail alert list, this means that in July almost 70% of website users were not actually registered with Norfolk Unites. This can be perceived as being an extremely positive occurrence, as it could represent where people who had received a news link and had forwarded this onto people in their own networks.

Month	Unique visitors	Number of visits	Pages	Hits
Jan 2008	4	18	1,396	8,766
Feb 2008	74	139	6,508	40,154
Mar 2008	110	227	3,179	12,797
Apr 2008	166	319	1,837	8,248
May 2008	145	213	1,166	5,266
Jun 2008	191	289	1,715	8,246
Jul 2008	222	358	1,307	6,403
Total	912	1,563	17,108	89,880

Hits

In the January and February, the 'hits' totals in the main can be attributed to website development therefore not representative in the final totals. However, in the 5 month period March to July there have been 40,960 which equates to an average of over 8,000 hits per month.

Visits

There were obvious peaks after news alerts. For example, on the day when the news of the Flexible Routeway Provision contract was disseminated, there were 30 visits whereas the average for that month was just 9. This helps to highlight a Norfolk Unites role for brokering and signposting of contract opportunities. This represents 30 different people who were interested in that specific opportunity as identified by the summary detailed on that e-mail.

6. Norfolk Unites Evaluation Survey

People were asked of their opinions of the work of Norfolk Unites to this point (January 2008 – September 2008):

Website – 80% customer satisfaction (av. 4 out of 5)

Example comments:

"I have used the Library section and the Train to Gain section on a number of occasions. It is an easy to navigate, accessible site – updates and News sections –very useful "

"It has revolutionised the information flow for providers and the updates have been especially useful, particularly in relation to funding and partnership opportunities."

Information: sourcing relevant information and presenting in accessible language – 88%

"Language/wording seem appropriate and accessible"

"I appreciate the info you send, and the format it's in, and it has assisted me on a number of occasions."

"It has been useful to have someone at the helm keeping an eye to changes and proactively sifting and filtering information and identifying the relevance for third sector providers, deciphering and then passing this on."

Aiding access to contracts – 70%

Continuing professional development and training – 72%

Participation/representation (fit for purpose for Norfolk Third Sector organisations) – 86%

"I have been welcomed to the working group and have always felt listened to and supported even though I am quite new to the learning and skills sector. I feel I have been able to contribute to the work in my capacity as manager of a small organisation."

Overall satisfaction in the work as facilitated by Community Connections – 90%

"It has been facilitated in an inclusive and participatory and transparent manner. It wasn't the easy route but it was community action research at its most thorough. Overall it was an exploratory and analytical exercise."

"We are pleased to be involved in this partnership and excited about the opportunities it represents."

"All credit to Toby (the co-ordinator) who has worked so hard to facilitate this work in the face of a rapidly changing external environment."

Other comments:

"Make sure that it utilises existing networks and structures and works with these."

Should Norfolk Unites continue? – 100% 'Yes' response

From the evaluation, respondents were asked to list the services that Norfolk Unites should focus on and the 'next steps'. Percentage figures represent the percentage of all respondents who recorded the respective response.

Service

Engage effectively with stakeholders/contract holders to enable better sub-contracting opportunities and arrangements	60%
Information and awareness	50%
Facilitate/promote partnership work/bids	40%
Bid on behalf of members	20%
Advocate role for Norfolk VCS	20%
Support training needs of members	20%

Interestingly, the initially perceived idea of the consortium (bid on behalf of members) met with 20% of responses, whereas work effectively with stakeholders met with 60% and promotion/facilitation of partnership bidding from within members an extra 40%.

Next steps

Pilot the consortium – put into place the work	50%
Approach strategic stakeholders/contract holders	50%
Engage Norfolk Third Sector/ build up membership	30%
Bring in funding to continue the work	20%
Work with infrastructure organisations outside of county	10%

7. Findings and Recommendations

Key findings

See learning consortia survey for further findings (page 15).

1. A lead bodies approach (in the short/medium term) would provide a resource-light model which would still enable key services to be undertaken. As relevant opportunities to apply for learning and skills contracts arose, the most appropriate organisation from within the membership would be chosen to lead on that application, with other, relevant members supporting those efforts. This process could operate at local, county or regional level and did not necessarily require a Norfolk Unites member to be the lead body for that application if it was felt that a more suitable candidate existed outside of the county (e.g. regional bids) and who would offer Norfolk Unites members wishing to deliver the better chance of success, influence and 'a fair deal' on that contract.
2. A need for a central, trusted point of information relating to training and skills opportunities and for this communication flow to be COMPACT compliant.
3. In regards to contract management, robust systems seen to be critical. This to include correct data inputting (risk of 'claw back' if incorrect paperwork); monitoring of providers to minimum performance levels, to include effective Management Information Systems. LearnerTrack MIS received the most recommendations.
4. In regards to contract lead organisations, it was seen that contract management/ experience was as/more important than an organisation with appropriate 'subject specific' experience in terms of achieving larger contracts.
5. It was feasible to outsource data inputting to the MIS organisation:

"We pay LearnerTrack to do the entire inputting etc. – enrolment, registration on course and completion. It is their business to get it right and cheaper for them to do it than for us to employ someone of our own to do it. They send reports etc. and we approve them, then send to the LSC. We can pull off management records as and when."

(Learning consortia survey respondent)

6. Reduction in LID money available and withdrawal of LSC Preferred Provider Status has necessitated a review as to possible services of Third Sector learning consortia.
7. One learning consortium had evidenced £900,000 additional funds to have been acquired by members due to the consortium in a brokering/ signposting role.

8. Of those learning consortia surveyed, only those that were 'well established' had achieved contracts in the OCT, regional contract environment. For non-established consortia it will be difficult to build up a track record to achieve success in contracts in this respect.
9. Trend towards larger, regional contracts.
10. How the Third Sector facilitates more effective sub-contracting relationships with contract holders is seen to be increasingly important.
11. Commissioning agents reported that they didn't always get enough tenders to deliver desired training.
12. No Third Sector organisations in the Eastern region achieved contract success in the ESF LSC and DWP rounds of 2007/08.
13. Average of 37% management fees for FE franchising was reported as opposed to the 20% recommended by the LSC. 15-20% Third Sector average reported from consortia survey.
14. 67% of consortia reported strong links with FE/adult education.
15. There was relatively little provision within Norfolk that meant constructing a Third Sector learning and skills consortium in 'the traditional sense' (i.e. contract management) was not financially viable.
16. Engagement of groups from some geographic and thematic areas was limited.
17. Well established providers already had strong relationships with contract holding bodies for contracts more relevant to the core of their work.
18. Greater awareness was needed from potential providers as to what types of provision could be funded by the LSC – i.e. courses from the Learning Aims Database which were predominantly NVQ in nature.
19. Minimum Levels of Performance mean that smaller cohorts are vulnerable as with one drop out it could mean these levels cannot be met and therefore at risk of claw back.
20. Review of the National Qualification Framework, upon which the Learning Aims Database is produced, and its re-focus as the National Qualification and Credit Framework could lead to an increased need for unit/credit-based provision to be delivered which would fit more comfortably with provision offered by smaller providers.
21. Clarity needed when presenting to stakeholders as to what it is that the consortium would/could do.
22. Increased cross sector work would increase the prospect of smooth progression of learners.

23. USP of the Third Sector is its function in working with the priority groups that strategic funding bodies are trying to support with their Programmes – any contract holder would need to work closely with the Third Sector in order to deliver to Programme outcomes. The Third Sector could either translate this USP into a position of strength as regards negotiation or; in applying for said contracts with a partnership approach, if the Third Sector co-ordinated and organised itself effectively.
24. A need to be flexible to different funding streams, mindful of the fact that it is difficult to support a large core to the consortium in the current funding and learning and skills environment.
25. A need not just to communicate, but also following up – needs to be active, not passive.
26. If providers from within the eastern regional Third Sector presented themselves as a united provision under the auspices of 'the eastern region Third Sector consortium (of providers)' then this would add weight to lobbying ability and potential influence with key regional bodies such as ACER (Association of Colleges in the Eastern Region) and EEDA (East of England Development Agency).
27. A number of PQQ holding Third Sector organisations not currently involved in the learning consortia work with the eastern region Third Sector.
28. The eastern region Third Sector needs to review whether it is seeking to compete against other sectors or work more effectively in partnership – the Third Sector can also do both on a case-by-case basis.
29. Performance related payments for learning and skills contracts means that work is paid in split terms, a percentage initially and the final percentage upon successful completion of intended outputs. This could present a cash flow burden upon the consortium (and of its – especially smaller – providers) in doing the work first and being paid later - a key constraint for DWP contracts (with LSC contracts paid monthly/quarterly depending on profiles).
30. Learning Plus, an established Third Sector learning consortium in Devon and Cornwall, lobbied their local LSC to deliver mainstream FE learning, based on shortfalls of FE engagement with learners from target groups in their area and co-ordinated Third Sector provision to meet that need.

Key recommendations

1. Pilot the Norfolk Unites consortium in the period October 2008 – March 2009 supported by a part-time co-ordinator.
2. Form a Steering Group of members who will task the Consortium Co-ordinator and to whom the post shall be accountable – managed by the lead body organisation.

3. Adopt a 'lead bodies, contract responsive' approach.
4. Adopt Terms of Reference (to include Vision; Impact Statement; Core Values; Objectives) as proposed in this document.
5. Engage stakeholders and contract holders of all sectors delivering in Norfolk to forge positive cross-sector working relationships.
6. Promote Norfolk Unites to ensure all Norfolk Third Sector organisations of all geographic and thematic areas are aware of the opportunities afforded by Norfolk Unites. Map member organisations and identify gaps in relation to geographic and thematic spread and seek to engage groups from under represented areas.
7. Engage Third Sector organisations outside of Norfolk to provide effective Third Sector regional working in terms of achieving/accessing contracts offered by the LSC, Jobcentre Plus. Providers from within the eastern region Third Sector to present themselves as a united provision under the auspices of 'the eastern region Third Sector consortium (of providers)' to add weight to lobbying ability and potential influence with key regional bodies such as ACER and EEDA.
8. Promote and facilitate joint bidding and partnership work for learning and skills opportunities as appropriate on local, county and regional levels.
9. Encourage lower management operated in relevant learning and skills delivery contracts through the Third Sector and appropriate strategic funding bodies more effectively requesting contract holders of all sectors to deliver contracts at or close to recommended 20% maximum management costs to enable greater numbers of beneficiaries to be supported by those programmes; to include monitoring of actual engagement with Third Sector organisations named as partners on applications.
10. Promote fees to be paid to Third Sector organisations for referring individuals to appropriate learning and skills programmes to increase engagement of the Third Sector, to recognise the contribution of the Third Sector and to ensure target interventions of contract holders are met.

Other specific recommendations

11. No separate legal entity to be created for the purposes of a learning and skills consortium for the Norfolk Third Sector but to be reviewed if Norfolk Unites becomes a contract holding body.
12. Steering Group to initially, in the Pilot Period until end March 2009, consist of individuals from those organisations involved in the working groups who wish to be involved at this level.

13. Membership to be offered at £75-£100 to all Norfolk Third Sector organisations delivering learning and skills – only courses from members will be marketed through the Norfolk Unites on-line directory. This fee to contribute towards the running costs of the consortium and provide visual commitment of members which will enhance chances of successful funding applications.
14. Associate membership applications to be accepted from both Third and non-Third Sector organisations where members feel their relationship adds value to the consortium.
15. Funding to be sought to continue the work of the Consortium Co-ordinator beyond March 2009 initially on the basis of 2 days a week.
16. Links to be made with Public Services Commissioning Project delivered by Voluntary Norfolk.
17. Specialist training to be sourced as regards members' need and then avenues sought to fund and deliver to this need.
18. The eastern region Third Sector to consider approach to regional and national Third Sector organisations holding PQQ in the eastern region but not currently involved in any of the county Third Sector learning consortia of the eastern region. This approach would be in relation to those regional/national Third Sector organisations potentially being a contract lead on behalf of the eastern region Third Sector learning and skills providers and to whom the available eastern regional Third Sector provision will be directed towards to support any such application, on proviso that appropriate consultation and partnership working is undertaken.
19. Any regional Third Sector application to have county hubs to ensure decisions are made as close to the community/beneficiaries as possible, enabling these hubs a decision-making/influence role in where the funds should be spent in their county – more able to serve local needs.
20. Closer links sought with the Norfolk Infrastructure Consortium, to include Local Area Agreement working group.
21. Production of the Directory, as recommended in report, to be made available on the Norfolk Unites website.
22. In the event of success in achieving contracts to purchase the service as offered by LearnerTrack, to include data inputting, and to adopt Learning Plus provider contract when signing up providers to be contract managed.
23. Promote awareness of Quality Assurance requirements as highlighted in the Quality research report to Norfolk Third Sector potential providers.
24. Promotion of 'clusters' of like-minded organisations within Norfolk Third Sector.

25. Continual evaluation of the consortium to ensure it is fit-for-purpose and serves the needs of its members. If it is seen to not 'add sufficient' value to member organisations, then consideration as to dissolving of Norfolk Unites upon recommendation of members.
26. To research gaps in LSC provision delivered to target groups in Norfolk and seek to co-ordinate Third Sector provision to meet that need.

8. Norfolk Unites Working Documents

All the above work has led to the below proposed working documents for Norfolk Unites.

Name: Norfolk Unites
(This keeps 'the brand' and builds on awareness)

Tag line: the one start shop for Norfolk Third Sector learning and skills
(This portrays Norfolk Unites as the starting point for work.)

Norfolk Unites Terms of Reference

Terms of Reference will be reviewed end March 2009 and then annually.

1) Norfolk Unites

Norfolk Unites is a consortium of Norfolk Third Sector learning and skills providers.

2) Our core values:

- Committed to partnership and collaborative working
- Championing cross-sector recognition of Norfolk Third Sector learning & skills provision
- Actively seeking learning and skills opportunities
- Dynamic information exchange
- Open; Transparent; Fair; Inclusive and; Equal – COMPACT compliant
- By the members, for the members

3) Vision:

To present a cohesive approach for maximising the value of the contribution made by organisations in the Norfolk Third Sector across the learning and skills agenda

4) Impact statement:

We will:

1. Increase life opportunities offered to the Norfolk population through learning and skills
2. Improve the competence and opportunities of Norfolk Third Sector organisations to deliver the Impact above
3. Present a responsive, credible, efficient and cohesive delivery mechanism to deliver to objectives set by strategic bodies

5) Objectives:

We will achieve the above Impacts by:

1. Acting in a brokering, signposting and facilitating role through engaging commissioning agents and presenting accessible information to Norfolk Unites members, actively promoting two-way relationships/awareness/information to enable more effective sub-contracting arrangements to take place and increasing the take up of opportunities available to members.
2. Promoting and facilitating joint bidding and partnership work for learning and skills opportunities as appropriate on local, county and regional levels.
3. Positioning the consortium as a contract holder on learning and skills offers where appropriate on behalf of, and for the benefit of, members.
4. Exploring funding potentials for desired services, as perceived by members, to be offered by the consortium and seek to deliver or facilitate delivery of those services.
5. Engaging effectively with the Norfolk Third Sector at infrastructure and provider level across all geographic and thematic areas, to ensure all appropriate organisations are able to benefit from the service of the consortium.
6. Actively seeking and making available to members information on the latest developments and initiatives in the learning and skills arena.
7. Providing a strong strategic and representative voice for Norfolk Unites members at the local, county, regional and national levels.
8. Ensuring communication and processes are COMPACT compliant: that is they are open; transparent; fair; inclusive and; equal.
9. Identifying training need from within Norfolk Unites membership and seek avenues to resource and deliver to this need.
10. Enabling members to have a true influence in the direction and work of the consortium.
11. Engaging effectively with bodies and providers of all sectors to offer improved progression of learners supported by members and to increase the opportunities of Norfolk Unites members to benefit from cross-sector partnership working.

6) Membership

1. Membership open to any Norfolk Third Sector organisation delivering learning and skills.
2. Associate members will be accepted from both Third and non-Third Sector organisations if members feel that that organisation represents added value to the consortium.
3. Only full (not Associate) members will have voting rights.
4. Observers may also be invited to attend meetings and participate in discussion but may not be permitted to vote.
5. Norfolk Unites members to have first refusal on training/funding opportunities made available through the work of Norfolk Unites.

7) Decision-making

1. The Steering Group shall consist of those members who wish to have an active say in direction of the consortium and it is the Steering Group who will vote on issues at meetings.
2. The Steering Group will ensure they are providing a fair and representative voice on behalf of all members.
3. Steering Group meetings will take place quarterly.
4. Members will determine action points to be undertaken by the Norfolk Unites Co-ordinator and the Norfolk Unites Co-ordinator will report back to the members on this progress at each meeting.
5. The Norfolk Unites Co-ordinator (or any other member acting in a proxy arrangement) is mandated to represent the voice of the members at appropriate events/meetings, having first canvassed the views of members.
6. Steering Group members will be expected to attend at least 50% of all meetings in each year. Attendance will be reviewed annually.
7. A proxy may attend a Steering Group meeting on behalf of a nominated representative no more than 2 out of 4 times. (The term "proxy" establishes that this role is to speak and vote on behalf of the absent member.)
8. Chair and vice chair to be elected annually by Steering Group.
9. All Steering Group votes will be on the basis of one member one vote. All votes to be decided by a majority.
10. The quorum necessary for the transaction of the business of the Steering Group shall be one third of its members at the prevailing time.

8) Representation

1. Any Norfolk Unites member attending an event/meeting on behalf (at least in part) of members is expected to ensure the views and interests of the membership (as mandated to do so by the membership) are presented accurately and to ensure awareness of opportunities and relevant information cascaded to members is unfiltered and within reasonable timeframes, ensuring all members are offered equal opportunity.

9) Information and awareness

1. All members will be expected to make Norfolk Unites aware of any funding/partnership/training opportunities from which other members may benefit.
2. Norfolk Unites will ensure that awareness of these opportunities reaches the appropriate members.

10) Ethos

1. Members are expected to behave in a manner which is not detrimental to the consortium or to any of its individual members. Members will be expected to work in a non-discriminatory, non-judgmental, inclusive and 'a-political' manner, respecting the views of other members at all times. Norfolk Unites reserves the right to request the withdrawal of the membership of any organisation that fails to work within this ethos or brings the consortium into disrepute.
2. Norfolk Unites is for the members and by the members and will seek to serve the members' interests at all times.

9. Next Steps

Activity will be based on a 6 month pilot period, Oct 08 - Mar 09. The decision was reached on the basis that the next ESF round will be Autumn 08 and the next mainstream round will be early 09. If Norfolk Unites does not achieve success (as perceived by the members) in this period, then a decision will need to be made by members as to the value of a consortium in Norfolk. It is felt we will be able to judge that in this period.

This sits within overall phases of development towards a Norfolk Third Sector Learning & Skills Consortium as follows:

Phase 1: Research and consultation – Reports and Unite event leading up to Unite 2 event

Phase 2: Development – Unite 2 to Unite 3, the Norfolk Unites work

Phase 3: Pilot period – putting proposals into place from Norfolk Unites and delivering services within that

Phase 4: Consortium – this phase will be delivered pending pilot period evaluation, buy-in from membership and achieving additional funding to do so.

10. End

As a process, a full feasibility work has been undertaken, seeking to explore all the problems and possible solutions as fully as possible. The work has endeavoured to make the best educated guess within the rapidly changing landscape in order to achieve the maximum possible impact from the time on this project.

The timing of this work has meant for a challenging environment within which to work. Whilst it would have been possible to 'create a consortium' and therefore meet the initial aims of the work it was deemed that this in itself would not necessarily 'solve the problem.' With work shifting to a wider focus, impacts of this can only be judged as part of a longer term process.

Community Connections has facilitated a 'bottom up' rather than 'top down' approach, not enforcing a certain way to do things but enabling participants to suggest the most practical, realistic and fit-for-purpose ways to approach a developing learning consortium. Interestingly, when organisations were surveyed in the Essex learning consortium development (2008), the most requested function of the consortium was for 'Signposting' (e.g. to training opportunities). Similar evidence acquired by listening to the members' needs in Norfolk has translated into a consortium with a small 'c' approach, in not being wholly focused on contract management.

In terms of responsiveness, with 6 week procurement cycles, there is a need not to react but to be ready to respond through proactive preparation. This ethos of proactive preparation has been very much at the core of the work.

Instead of 'a consortium', Norfolk Unites should perhaps read as 'a consortium of providers' which requires a paradigm shift as to 'what is a consortium?' In this instance, a consortium is flexible, resource light and able and ready to respond as the need arises.

Some final words from people who have benefited from and contributed to the work of Norfolk Unites:

"Norfolk Unites has provided a valuable chance to work with other similar organisations in the area, to look specifically at how we might best respond to subcontracting or consortium-based opportunities to access statutory funding, and how we can share best practice in the area of quality assurance."

– working group participant

"Well done to Toby Cullingham who has led the process in a truly enthusiastic, professional way with integrity and honesty. He has approached this development phase realistically and this has led Norfolk VCS providers to be in a positive position for future partnership work.

In relation to the original brief for this phase of the work Community Connections has exceeded the original targets and added great value to the project which will continue to benefit the VCS providers in Norfolk, e.g. CPD opportunities, information events, quality toolkit and provider directory."

- working group participant

Statement from the Norfolk COMPACT Officer:

"My concerns as Norfolk Compact Officer are always related to process as followed by any new developments that may affect or impact upon the voluntary and community sector. In terms of the development of a Learning Consortium my main issues concerned engagement and communication hence my involvement with the Communication & Engagement Working Group.

In my view the processes for the development of the Learning Consortium have embraced the Norfolk Compact principles and undertakings in all respects.

The Norfolk Unites website has been particularly valuable, both as a source of information and as an excellent means of communication between all parties either directly involved in the development process or those organisations that have had no direct involvement in the development process but will nevertheless be affected by the final implementation."

- Dennis Mawson, Norfolk COMPACT Officer

And to end:

"The work of Norfolk Unites has highlighted what is best about the voluntary sector - passion for the cause, ability to work in partnership and creativity combined with effectiveness in delivering results for beneficiaries."

- working group participant

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