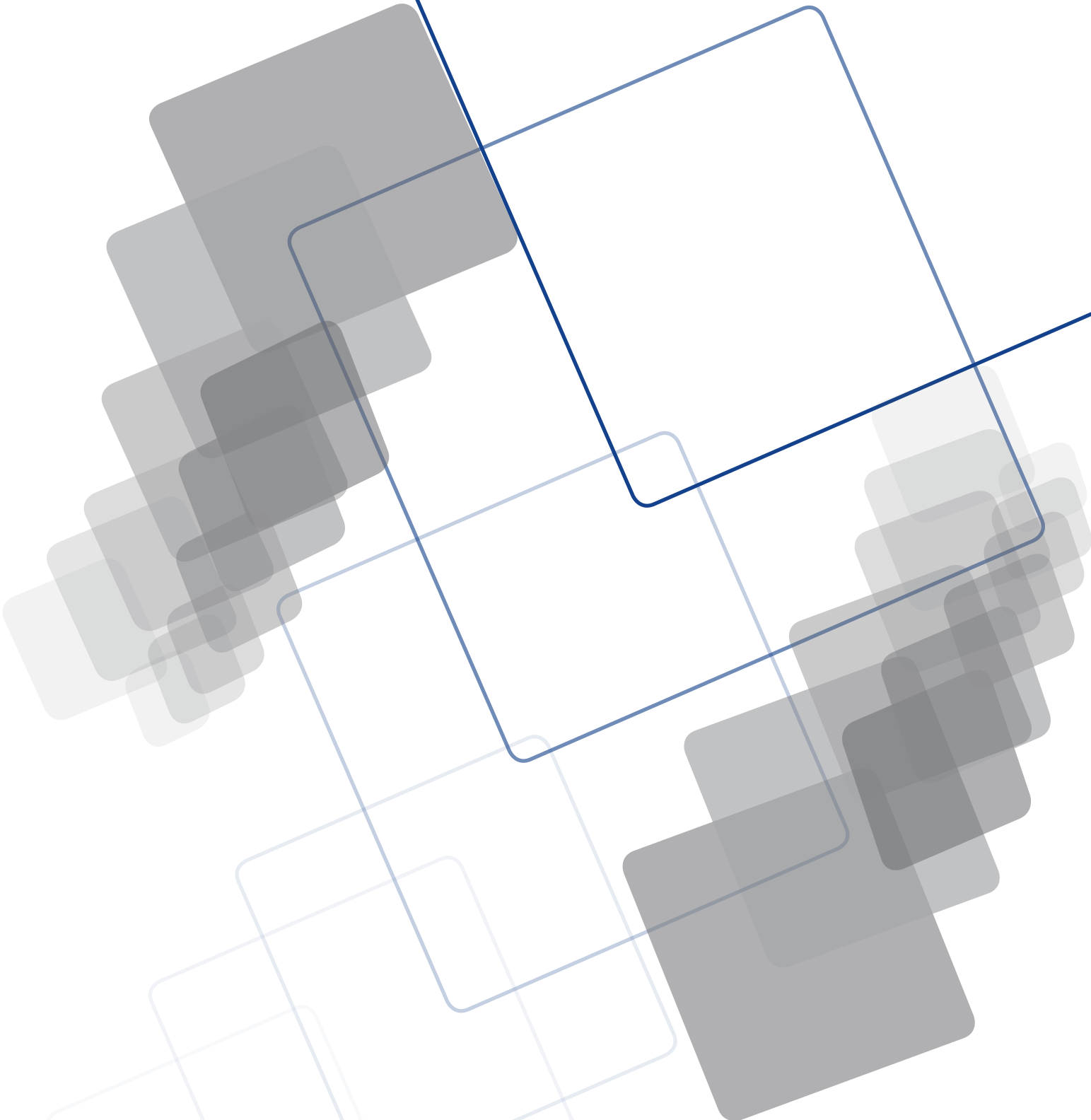


Norfolk Unites



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



Norfolk Unites



Norfolk Unites Directory Report:

*Development of a Training and Learning
Directory to enable Voluntary and Community
Sector organisations of all sizes to more easily
access larger contracts held by VCS and
non-VCS bodies*

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Delivered and written by Phillip Stone



“...all charities should consider seriously and imaginatively whether there are ways in which they could do more and better for their users by working together.”

Charity Commission, (RS4) 2003

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A. Introduction and Background to the Project

1. The Project Brief, to develop "a Directory to enable VCS organisations of all sizes to more easily access larger contracts held by regional VCS and non-VCS bodies", expresses a need for a relevant and robust resource for both purchaser and potential supplier. In addition, the resource should be easily (and cheaply) maintained and sufficiently flexible so as to be able to adapt to changing needs, at least in the short run. It was envisaged that the directory in the first instance would exist online with an option for hard copy if deemed desirable.
2. That Norfolk Unites decided that now was the time to produce such a directory was propitious. As the tender for the project maintained, the introduction of the 'contracts culture' in the early 1990s has had a major impact on the providers of training and learning in and for the VCS, some of it positive, some not. On the plus side, agencies with enough size, scope and infrastructure have been able to use their resources to make the transition relatively effortlessly, ending up both with enhanced access to commissioning bodies and excellent procurement 'strike rates'. On the other hand, many SME providers, sole traders, burgeoning social enterprises and self-sustaining training functions of larger organisations have often found themselves short of time, information, contacts and resources to respond to the often telescoped timetables of procurers. This is often the case in rural areas and where VCOs are niche providers, as applies to much of Norfolk. As a result, potential providers opt out or miss out on the commissioning process all together – thus perpetuating their fringe status – and perhaps more importantly, feel unable to explore potential collaborative ventures and developmental opportunities with colleagues. Procurers similarly lose out by not having the opportunity to evaluate the potential of a group of diverse, highly skilled and often incredibly-well grounded training and learning providers. In short, word-of-mouth and informal networks were proving insufficient in the world of procurement and tendering.
3. What was needed was a Directory that could both respond positively to the changing world of commissioning by taking into account procurement needs and delivery services and be of itself a resource with the proper design, structure and format to generate its own momentum.

B. Project Goals

1. Initial research showed that both nationally and regionally, the Voluntary and Community Sector, through its local infrastructure organisations like CVSs and VCAs, is awash with Directories that meet some of the requirements for the this sort of directory but there are very few if any examples which meet them all. In a way this is inevitable, as the 'maintenance requirement' is a hostage to fortune to the input from the organisation that hosts the directory, which in turn depends on future funding and support levels. In other ways however, the 'accessibility' and 'robustness' requirements usually founder because the resource is simply not flexible enough from the outset in terms of format and content so as to accommodate change. This results in both purchaser and potential supplier simply not feeling motivated enough to allocate the necessary time and money to keep the directory relevant and therefore, useable. The 'dead letter' drop of directories is manifestly larger than the repository of those in current circulation.
2. This project has therefore focused on developing a type of directory that would eschew this 'here today – gone tomorrow' syndrome. It has looked to develop a directory that could keep all contributing parties committed to updating their respective input on a regular basis while at the same time releasing the host organisation from its traditional 'make or break' status. This seemed to require, as a primary goal, an overall design that could encompass simplicity, creativity and a rather vaguer notion that all stakeholders could engage with it authentically from their own, unique perspective. To achieve this goal, the project undertook research into the variety of directories currently deployed in the VCS nationally, culled those aspects from these examples that seemed to meet this goal and subjected the resulting template to professional scrutiny by several consultants and trainers and Norfolk Unites.
3. From the perspective of commissioners and contract holders, research indicated a traditional format of categories of information dating back, in some cases, decades. Intuitively, this seemed inadequate, because times – and presumably information and service needs – had also changed. The second primary goal for the project therefore was to discover what in reality the respective buyers and sellers actually wanted to know about one another now and their likely requirements in the near future. A questionnaire (Commissioners Audit Survey) was designed and distributed to 15 current, recent past and likely future regional commissioning organisations to determine both how they saw their own training and consultancy needs and what they were looking for when seeking out a VCS provider in those areas. The results form the basis of the content of the category 'Areas of expertise, experience or specialism' in the recommended directory template(s) and inform other categories as well.
4. Finally, taking the requirement from Norfolk Unites that the Directory must be as easy and cost-effective to manage and maintain as possible, the project's third primary goal was to discover the best way of achieving this so as not at the same time compromise the effectiveness, efficacy and relative durability of the directory itself. This goal depends to a significant extent on final decisions concerning the format of the directory, of the technical support available to put and keep the directory online and of the available maintenance infrastructure.

Service Requirements Analysis

Norfolk Unites directory to enable VCS organisations of all sizes to more easily access larger contracts held by regional VCS and non-VCS bodies.

Commissioners, Procurers and Contract Holders Service Requirements – Analysis

A. Results

Key: ***Bold Italics*** indicates special significance for the Directory

Theme 1 - Experience

1. Experience of procuring external training or learning services.

- 1.1 All of the responding Commissioning, Procuring and Contract Holders (CPCHs) are experienced either at commissioning or brokering or holding financial contracts for a minimum of 2 years in Norfolk.
- 1.2 Combined, they represent all of the key CPCH relationships – direct delivery, partnerships and sub-contracting.
- 1.3 *Two of the respondents have dedicated CPCH teams and two have CPCH as their raison d'être.***
- 1.4 All CPCH teams and organisations commission for one or more of these broad categories: skills, advice, training and enterprise.

2. Positive aspects of CPCH procuring training services of the VCS.

- 2.1 Ensuring meeting government's agenda with the VCS and the public sector's responsibility in engaging with that agenda where appropriate.
- 2.2 *Capacity building, especially in areas of vocational and employability training.***
- 2.3 Positive impact on client / service user / learner
- 2.4 A one-door for local training solutions
- 2.5 *Commitment of provider to accommodate needs of CPCH***

3. Negative aspects of CPCH procuring training services of the VCS.

- 3.1 Varying quality of provision
- 3.2 Short-term nature of funding results of lack of strategic business planning
- 3.3 Varying ability to meet CPCH requirements viz. monitoring and data management.
- 3.4 Lack of flexibility in adapting to service users changes in learning requirements

3.5 Difficulty in identifying in advance the quality of prospective providers.

4. How past VCS training has helped CPCH to:

(scale from 1-5 with 5 being highest benefit)

Responses from 5 respondents	Deliver its objectives	Improve its services	Enhance range of training	Alternative and professional approach
Total	18	19	18	17
Mode (most frequent responses)	4	4 & 5	4	3

	Meet your commitments	Progress views of your stakeholders	Improve your organisational profile	Diversify your training and learning provision
Total	17	18	19	18
Mode	3	4	3 & 4	4

	Access to new skills	Sharing information	Ensuring best practice
Total	19	18	17
Mode	3 & 4	3	3

Theme 2 – Potential Benefits to the CPCH through engaging the VCS for its training and learning provision

5. Benefits to your organisation.

- 5.1 Diversification of delivery style and resources enhances reputation of organisation.
- 5.2 Consistency of delivery is both a marketing plus and enables minimum of infrastructural support
- 5.3 Specialism and expertise of VCS means org. can focus on its own strengths
- 5.4 Specialism and expertise of VCS works as an 'agent' for CPCH where it lacks penetration**
- 5.5 Better understanding of the VCS

6. Benefits to your stakeholders, service users and beneficiaries.

- 6.1 Greater credibility in the community – grassroots awareness, locally grown delivery**
- 6.2 Flexible approaches to delivery
- 6.3 Ability to plan progression routes for beneficiaries – organisation to organisation and organisation to mainstream
- 6.4 VCS has better networks to meet the diverse needs of service users.**

7. Barriers for your organisation or your relevant stakeholders in securing provision from the VCS.

- 7.1 Partnership working, where requirements of the sectors conflict e.g. (our) rigid rules re: funding, especially outcome funding
- 7.2 Tensions between monitoring/evaluation and delivery
- 7.3 Risk of duplication of efforts if poor communication
- 7.4 Understanding what is available in the VCS – they undersell, under advertise and under promote themselves**
- 7.5 Trusting their capacity – to deliver at all, to tender effectively (e.g. provide information on track record and previous outcomes**
- 7.6 Belief that the VCS lacks a proper commercial framework**

Theme 3 – Looking Forward

8. Future training and learning procurement needs

8.1 Of the 43 categories* offered, the following scored consistently higher: adult education / BME and faith groups / disability / diversity / education and worklessness / health and safety / life skills** / Norfolk***/ personal growth / refugees / rural life / special needs / substance misuse / volunteering / workforce development / young people.

* *culled from several extant and recognised VCS training supplier directories including the Management Development Network, Voluntary Norfolk, The Guild and ?? Suffolk*

** *includes 'basic skills' like literacy and numeracy and preparation for work skills like job hunting and application form completion*

*** *includes both generic and county-wide IAG skills*

8.2 The top scorers of these were adult education / disability / education and worklessness / life skills / health and safety / Norfolk / personal growth / young people

8.3 Lowest scorers were finance / fundraising / governance / management systems / marketing and P.R. / monitoring and evaluation

9. Perceptions of tendering environment

9.1 Most respondents said they receive a good but not full enough range of bids for contracts

9.2 Increasing the range would enhance sections 5. and 6. above

10. Information CPCH would like to know about VCS suppliers bidding for contracts.

10.1 Top scorers (not rank ordered): quality assurance statement / track record - delivering similar work, delivering publicly funded contracts / financial capability/ sector knowledge / HR info – experience of trainers, qualifications of trainers / clear course details including cost, site, qualifications on offer / networks, partnerships and consortia / delivery capability – permanent site, outreach, in-house facilities

B. Analysis

1. There is quite a lot of important information, from their perspective, CPCH organisations do not know about potential VCS suppliers, yet their experience of provision is fairly positive – sections 2 & 3
2. CPCH contractors feel that VCS suppliers have an important and at times unique contribution to make, so will in all likelihood continue to use them despite reservations- sections 2 & 3
3. Bidders/suppliers need to realise that their work is perceived as having an impact upon the organisation of the contract holder- sections 5 & 6
4. Procurers would like to see more general quality assurance awareness in bids – sections 2, 7 & 10
5. Procurers need to see how training suppliers could deliver more, different, extra and ideas for follow-on – all sections
6. Contractors are most interested in training that delivers in the areas of improvement and development - section 4

etc.

C. Implications and considerations for the Directory

The Directory should enable or provide:

1. Providers to be confident and bold in their entries – B1
2. Providers to emphasize organisational and sector USPs – B2
3. Providers to state how their work can add value to the commissioning organisation – B3
4. Fields on quality and quality assurance - B4
5. Information about their work / approach / style adds value to a commissioning brief – B5
6. Information about how their work leads to follow-ons – B6

etc.

C. The Recommended Template

(Optional) Organisational CV and Biography

The CV should be no longer than 500 words and should focus on factual information about you and your career. **The biography** should be no longer than 200 words. Please use the following format, presenting consultancy, training, facilitation and/or research histories with the most recent first.

Organisational name, address, Tel/Mob, email and web address

Consultancy history – an overview of consultancies you have undertaken in the last 3 years

Training history - an overview of training events / projects you have undertaken in the last 3 years

Facilitation history - an overview of facilitations you have undertaken in the last 3 years

Research history - an overview of research projects you have undertaken in the last 3 years

Biography – an overview which can be used in tendering for work

All sections must be completed in full.

BASIC INFORMATION

Contact details of organisation / individual

All contact details – name, address, phones, mobiles, email addresses, web address

Category	Tick boxes	Fixed choice	Open - ended	
Name of organisation / individual			√	
Contact details			postal address email addresses phone numbers mobile numbers web address	

CAPACITY, AVAILABILITY, AND GEOGRAPHICAL REACH

We are able/willing to work

- Locally: please specify e.g. only Norwich area, only W. Norfolk, Fakenham area, etc.
- Throughout Norfolk
- East Anglia
- Eastern Region
- Anywhere in England/Wales
- Anywhere in the UK
- Other

We can contribute

- Occasional advice by telephone/email
- An occasional day
- A regular day once a month/quarter
- A day a week for a few weeks
- Two or three days at a time
- A week or two at a time
- Full-time for a specified period
- Other

We charge for our work at these current rates and in these way(s):

AREAS OF EXPERIENCE AND EXPERTISE

1. Place 1 tick where you have either experience or expertise and 2 ticks where you have both.

- adult education BME and faith groups communities disability diversity
- education and worklessness environment finance health & safety life skills
- Norfolk older people organisations personal growth refugees rural life
- special needs substance misuse volunteering workforce development
- young people other(s)

2. Within these areas, indicate (up to 5) where you have **particular** experience or expertise:

- Preparing area-wide strategies
- Assessing business opportunities
- Preparing business plans
- Delivering accredited training programmes
- Developing projects and programmes
- Managing projects and programmes
- Evaluating projects and programmes
- Public consultation and community engagement
- Organisational development and change management
- Financial appraisal, support and/or guidance
- Devising and delivering other training programmes
- Other(s)- up to 5 additional

3. If you deliver or could deliver **accredited courses** in the following areas, please tick which ones and the particular accreditation e.g. NVQ Level 2 Skills for Life..

Area	Accreditation	Area	Accreditation
adult education <input type="checkbox"/>		BME and faith groups <input type="checkbox"/>	
communities <input type="checkbox"/>		disability <input type="checkbox"/>	
diversity <input type="checkbox"/>		education and worklessness <input type="checkbox"/>	
environment <input type="checkbox"/>		finance <input type="checkbox"/>	
health & safety <input type="checkbox"/>		life skills <input type="checkbox"/>	
Norfolk <input type="checkbox"/>		older people <input type="checkbox"/>	
organisations <input type="checkbox"/>		personal growth <input type="checkbox"/>	
refugees <input type="checkbox"/>		rural life <input type="checkbox"/>	
special needs <input type="checkbox"/>		substance misuse <input type="checkbox"/>	
volunteering <input type="checkbox"/>		workforce development <input type="checkbox"/>	
young people <input type="checkbox"/>		other(s) <input type="checkbox"/>	

TRACK RECORD

1. Either:

List up to five pieces of consultancy / training / facilitation / research work undertaken or underway in the format shown below. If you have not undertaken such work before please provide instead a statement of the kind of work you believe would be appropriate for you. Name of project, client, dates, type of contract, aims of the work, your organisation’s role, outcomes of the work.

Or:

Complete the box below showing up to five pieces of consultancy / training / facilitation/ research work undertaken or underway. If you have not undertaken such work before please provide instead a statement of the kind of work you believe would be appropriate for you.

T	Tick box	Fixed choice	Open-ended
Examples of recent work Project one	consultancy 1.	sector	✓
	consultancy 2.	name of client	✓
	consultancy 3.	type of contract	✓
	consultancy 4.	work brief	✓
	consultancy 5.	outputs	✓
		outcomes	
	training 1.	sector	✓
	training 2.	name of client	✓
	training 3.	type of	✓
	training 4	contract	✓
	training 5.	topics	
			✓
			✓
research	sector	✓	
as above	name of client	✓	
	work brief	✓	
	outputs		
facilitation	outcomes	✓	
as above			
	as above	✓	
other			
as above	as above		

2. Please list the places, settings and approaches you have worked within...

With others - in partnerships / in consortia / cross sector / in networks

Sectors – public, private, voluntary and community, academic

Diverse communities, divided communities, particular cultural/ethnic communities

Geographical scale – neighbourhood, district, sub-regional, regional, national

Age groups – children, young people, families, older people

Communities of interest/equality groups – women, BME groups, people with disabilities, other

SKILLSET SELF-ANALYSIS

1. I / We are good at...

Choose up to 10 and put them in order to reflect your skills

Asking open questions

Being open to new ideas

Helping other people to think things through

Being a sounding board for ideas

Helping to formulate a vision/action plan

Coming up with suggestions when no-one else thinks of anything

Facilitating meetings, events, workshops

Preparing reports, visuals, displays, models

Seeing spaces and places differently/creatively

Seeing problems and opportunities differently/creatively

Horizon scanning, risk assessment, contextualising

Helping people to overcome conflict

Managing projects efficiently

Juggling multiple tasks

Research – academic / action

Finding people who can help with a specific task

Preparing project proposals including budgets, milestones and outputs

Evaluating impact of a project or programme

Helping organisations to develop and change

Supporting, mentoring and coaching individuals

Leading teams of staff or associates to get the best out of each person

Presenting ideas and proposals

Devising and delivering training

Other (name)

2. My / Our working style, we like to think, can best be described as...

Choose up to three styles that best describe you:

Inspirational

Energetic

Precise

Concise

Factual

Humorous

Formal

Facilitative

Other (no more than 3)

3. I / We can deliver...

Staff with these qualifications...

A workplace venue with these facilities...

Our quality assurance pledge

Our membership of these professional organisations...

Insurance coverage – professional indemnity / public liability / other

ATTRIBUTES TO WHICH REFEREES COULD ATTEST

Punctuality

Reliability

Meeting deadlines

Attention to detail

Accurate record-keeping, including time-sheets where necessary

Added value

Others

D. Notes about the Template

1. The template – overall

- 1.1 The template can be used as an open directory or as one requiring approved status. This report is based on the former.
- 1.2 It should be interesting to complete and worthwhile to read.
- 1.3 It requires the contributing organisation to think about both what they have done and what they could do in the future.
- 1.4 It enables contributors to stand out and be distinctive.
- 1.5 It enables contributors to see how their resources dovetail with commissioning requirements.
- 1.6 It should be updated at least once a year and ideally twice a year by both contributors and the directory management.

2. The template – particular sections

- 2.1 Optional – Organisational CV and Biography. A web page of up to 500 words, this section of free text allows the contributing organisation to focus on its strengths and particular successes, to give examples of written work such as training programmes and to comment on its style of delivery and how it works or would like to work in partnership with other, similar organisations.
- 2.2 Areas of experience and expertise: section 1. – The number of options is considerably fewer than most similar directories. This is for 2 reasons. First, they are the composite, umbrella areas under which most of the consulted commissioning agencies defined their work, and most importantly, under which they search when seeking suppliers. Second, having fewer areas allows for greater flexibility for contributing organisations to be both inclusive and exclusive.
- 2.3 Areas of experience and expertise: section 2. – This is where contributing organisations can be more specific, but still in a general way, about their overall areas of experience and expertise.
- 2.4 Track record 1. – The first option is completely open-ended while the second option is a mix of tick box, fixed field and open-ended.
- 2.5 Track record 2. – This sort of information was specifically requested by commissioners who felt they would like to see at a glance the breadth and diversity of the tendering organisations.

- 2.6 Skillset self-analysis – This, in particular Sections 1 and 2, is the most unusual and innovative aspect of the template. It has been developed as the result of comments from both training and learning suppliers and commissioners who each felt, for their own reasons, that most directories were somewhat mechanistic and that they wanted some way of expressing their style, approach and delivery strengths other than through direct self-publicity inherent in a completely open-ended type of entry.
- 2.7 Attributes to which referees could attest – Some tenders request referees, others don't. This category enables commissioners to request certain and specific information from referees that pertains to the contract at hand.

E. Creating, Managing and Maintaining the Directory

1. It was beyond the scope of the project to take account of the technology needed to create, manage and maintain the Directory online. However, it is not believed that these requirements are onerous and therefore hopefully not too costly.
2. Like most directories, time input is front-end loaded for both contributors and the directory management. Regarding the former, this is desirable because it means that it cannot be completed in a hurry or in a slipshod manner; to do so would clearly hamper their chances of being picked up or seriously considered. For the directory management, some initial time may be spent answering queries but it is envisaged that this would be due more to the unusual sections than unclarity about what is required and therefore responses would be quick.
3. It has already been suggested that updates should be undertaken at least once and ideally twice a year. Research has shown that contributors to such directories often just cannot be bothered to update their initial entry, especially if they feel that that entry has not brought forward work results. If they are slow or non-compliant in updating, this results in a knock-on for the managing agency which may in turn lose their pre-booked technological resource. A negative spiral results which often means that after one or two marginally successful updates, no others are forthcoming and the directory becomes out-of-date and marginalised. It is believed that updating of this template should take no more than 10 – 20 minutes (excluding the optional Organisational CV and Biography) and that the task would hopefully be experienced as relevant and interesting.
4. This template is not thirsty for ongoing management monitoring or input. However, if the managing agency wants to charge for entry or institute a system of approved status or secure sponsorship or piggyback other aspects of its work onto the directory or ensure comprehensiveness of the VCS in Norfolk and beyond or otherwise explore how the directory has impacted upon the work of both suppliers and commissioners, it may well want to consider retaining the services of an external agency to overall manage the directory.

F. Template SWOT Analysis

<p>Strengths</p> <ul style="list-style-type: none"> • it is based on what commissioners want to know now and in the future • it allows commissioners to conduct a modified 'search' for tender PQQs • it allows for contributors to be distinctive • it has a mix of inputting motifs that should keep contributors interested and motivated • it is jargon-free in the sense of current social work categories and is therefore flexible • it has clear management expectations • it is not management thirsty • it is adaptable to both open (anyone can enter) and closed (entry by appointment) systems 	<p>Weaknesses</p> <ul style="list-style-type: none"> • more administration and management is required at the front-end entry level than other similar directories • because it is not a typical directory format, some appropriate potential contributors may be put off by certain sections • regular updating by all stakeholders is essential for maximum effectiveness
<p>Opportunities</p> <ul style="list-style-type: none"> • the managing agency can use it to showcase their other work • it can result in the forming of new partnerships, consortia and informal networks of VCS training and learning providers • such new configurations of working could benefit all commissioners and thereby end-users of services 	<p>Threats</p> <ul style="list-style-type: none"> • through force of habit, commissioners simply do not use it • through force of habit, it is considered a one-off achievement rather than a work-in-progress • management issues such as unclear lines of responsibility for its upkeep, staff changes, funding problems, etc. • it doesn't deliver desired outcomes • it doesn't know what outcomes it has or hasn't delivered

