

AGREEMENT BETWEEN GATESHEAD COUNCIL AND NEWCASTLE CVS
PERFORMANCE MANAGEMENT FRAMEWORK

1) Introduction

This report gives a nine month update on performance and delivery for the period 1 January 2017 to 22 September 2017 against the outcomes of the agreement. It is monitored on a quantitative basis (performance measures) and a qualitative basis (impact reports), against the three key functions of this Agreement, namely:

- Networking and Representation of the Voluntary and Community Sector
- Support and Development of the Voluntary and Community Sector
- Engagement, Marketing and Communication

There are also the obligations under contract monitoring:

- Reports are produced each quarter
- Regular meetings held with the Service Director
- Regular meetings held with responsible officer

The performance measures and targets are outlined in the table below, followed by some further detail regarding the three key functions, in paragraphs 3-5.

As the period concerned spans two municipal years, the figures for 2016/17 and April 2017 onwards are included

PERFORMANCE MEASURES AND TARGETS 2016/17

| Indicator | Baseline Position March 2016 | March 2017 Target | Position at Q4 (20th April 2016 to 31st March 2017) |
|---|-------------------------------------|----------------------------|--|
| Number of community groups directly engaged | 109 | 200 | 321 individual groups |
| Increase the number of community groups accessing support for the first time | No baseline | Baseline to be established | 321 individual groups |
| Provide advice and guidance to organisations to enable them to submit funding applications for a combined total value of between £500,000 and £1 million | £56,028 | £500,000 | £987,914 |
| Number of Gateshead VCS organisations provided with funding advice | 29 | 50 | 60 individual groups |
| Increase the number of groups actively using Our Gateshead website | 2030 | 2,250 | No way of recording accurately how many groups use OurGateshead |
| Number of pages viewed of OurGateshead website per year | 66,682 website visits | 120,000 website visits | 128,973 website visits |
| Maintain and update a database of community and voluntary organisations in Gateshead | 184,486 page views | 300,000 page views | 325,346 page views |
| Provide performance management reports for the Partnership Board, to include feedback from service users, emerging intelligence and progress on meeting the performance framework targets | n/a | Ongoing management | Provided on 9 th November 2016 |
| Produce a State of the Sector report for Gateshead | n/a | 1 (by December 2016) | Report produced and disseminated in February 2017 |
| Produce and present a performance management report to the Council's Corporate | | | This took place on 13 th February 2017 |

| | | | |
|---|---|-----|-----|
| Resources Overview and Scrutiny Committee | | | |
| Increase number of consultation and community engagement events | 0 | 10 | 14 |
| Councillor feedback process | | tbc | tbc |
| Service users feedback | | tbc | tbc |

PERFORMANCE MEASURES AND TARGETS 2017

| Indicator | Baseline Position March 2017 | Target December 2017 | Position at Q2 2017 22 September 2017 |
|--|-------------------------------------|-----------------------------|--|
| Number of community groups directly engaged | 321 | 150 | 102 |
| Increase the number of community groups accessing support for the first time | No baseline | Baseline to be established | No way of accurately recording |
| Provide advice and guidance to organisations to enable them to submit funding applications for a combined total value of between £500,000 and £1 million | £987,914 | £375,000 | £56,193 (current amount pending is £138,917) |
| Number of Gateshead VCS organisations provided with funding advice | 60 | 38 | 35 |
| Increase the number of groups actively using Our Gateshead website | 2030 | 2250 | No way of accurately recording |
| Number of pages viewed of OurGateshead website per year | 128,973 website visits | 90,000 website visits | 69,422 Website visits |
| Maintain and update a database of community and voluntary organisations in Gateshead | 325,346 page views | 225,000 page views | 185,808 page views |

| | | | |
|---|-------------|---------------------|---|
| Provide performance management reports for the Partnership Board, to include feedback from service users, emerging intelligence and progress on meeting the performance framework targets | Report made | Ongoing management | We will provide reports for the Partnership Board, date to be set |
| Produce a State of the Sector Report for Gateshead | Report made | One (by March 2018) | We will produce a report by March 2018 |
| Produce and present a performance management report to the Council's Corporate Resources Overview and Scrutiny Committee | Report made | One | We will produce a report to the Corporate Resources OSC (this report) |
| Increase number of consultation and community engagement events | 14 | 8 | 6 |
| Councillor feedback process | | tbc | We would welcome suggestions |
| Service users feedback | | tbc | tbc |

Doing Good in Gateshead presented by Sally Young

Number of Feedback Forms returned 9 out of 11

Cllr Gannon (Chair), Caffrey, Mole, Wallace, Duggan, S Green, Haley, Bradford, Hood, B Goldsworthy, Simpson

"Good general survey"

"This is a large issue and we need to continue with it" - Cllr Mole

"Regular updates in this sector please, new ways to raise funding with new initiatives as well need to be explored - CT Bills? Options?"

| | | | | |
|--|--------------------|---------------------------|------------------------|----------------|
| The topic presented was | Uninteresting 0 | Interesting in parts 1 | Very interesting 10 | |
| The content of the presentation | Too simple 0 | Just right 9 | Too complex 0 | |
| The length of the presentation | Too short 0 | Just right 9 | Too long 0 | |
| The amount of time left for questions | Not enough 0 | Just right 9 | Too much 0 | |
| Quality of presentation | Poor 1 | Satisfactory 1 | Good 5 | Excellent 3 |
| What learned will be useful in my role as Councillor | Not at all 0 | Partly 0 | Mostly 3 | Totally 6 |

PERFORMANCE MEASURES AND TARGETS

2) Background

In Spring 2016, Newcastle CVS was invited by Gateshead Council to provide support, development, networking and representation to the voluntary and community sector in Gateshead. The contract started on 20 April 2016, and also included management of the provision of OurGateshead, the online resource used for community groups, events and activities, which include support for health and wellbeing.

Since this time, Newcastle CVS has extended other services within the organisation to include and involve Gateshead. This includes HAREF (Health and Race Equality Forum), BSBT (Home Office funded project on Building a Stronger Britain Together) and also SkillsBridge (professional volunteering support – which had worked in Gateshead previously).

3) Networking and Representation of the Sector

Although there are three separate functions, the reality is they are all inter-related. The community intelligence that comes from the support and development work, feeds directly into the representation of the sector, and enables CVS to tailor more appropriate services to local groups in Gateshead.

Initially there was a significant demand for support for the sector as there had been minimal support from GVOG for some time. We are now finding we are working more intensively with some smaller community organisations, particularly those groups which have older volunteers, or are unclear about governance requirements and those groups which cannot access information and services digitally.

Inevitably community groups and larger voluntary organisations make different demands on Newcastle CVS; albeit all are valid. Larger, well-established organisations tend to ask for strategic information, representation and access to key leads; whereas smaller community organisations tend to ask for and need direct support such as form-filling for funding applications, help with policies and procedures and *“Being kept on the right track.”*

The Voluntary Sector Leaders Group has now been established and has met five times. It met with Gateshead Council’s Chief Executive in July and with the Interim Commissioning Lead in October. It provides information about the sector, encourages networking with each other, and provides access to key decision-makers.

Invitations have been sent out to Gateshead groups engaged in children and youth work, mental health, carers, disability to come together about particular issues, policies, and local and Government consultations. This will increase and enhance not just the knowledge, but their positive relationships with each other, which could lead to partnership working in the future.

Wellbeing and Health Open Forums take place every four months with the recent September meeting focussing on arts and culture as a mechanism to improve wellbeing and health.

An example of this networking approach is the Wellbeing and Health Open Forum and CHYP IN. These fora are open to voluntary and community organisations across Gateshead and Newcastle. Both Forums met in summer and the main item for the Wellbeing and Health Open Forum was a presentation from Julie Ross, Director of Integration in Gateshead and Newcastle about Health and Social Care Integration in Gateshead and Newcastle. The integration model for both local authority areas was shared; comments about the model included criticism of underpinning assumptions about voluntary organisations' abilities to be part of the integration model without adequate funding and minimal thought given to harnessing the capacity of the voluntary sector. The Open Forum also included a presentation about OurGateshead and a discussion about use of Asset Based Community Development approaches in Gateshead and Newcastle.

The representation of the sector, the provision of its voice and advocacy, comes mainly through representation at key meetings. The Health and Wellbeing Board has a Voluntary Sector Health and Wellbeing Advisory Group the day beforehand. An invitation is sent out to around fifteen key voluntary organisations to attend. The meeting is chaired by the CVS Chief Executive, who is the voluntary sector representative on the Board. The Gateshead Council Officer leading on Health Policy attends and briefs the group, taking it through the Health and Wellbeing Board agenda. This mechanism enables voluntary sector organisation leads to be very well-briefed on local health issues, to feed into the process and to inform the CVS Chief Executive to reflect the voluntary sector's perspectives at the Board.

The Chief Executive is a member of the Gateshead Health and Wellbeing Board and in July presented a report on the '*contribution of the voluntary and community sector to improving health and wellbeing in Gateshead*'. The report drew up on findings from *Doing Good in Gateshead*, the survey of the Borough's voluntary and community sector produced by Newcastle CVS. The report detailed the significant development of the sector's role in improving health, wellbeing and care, during the past twenty five years. These roles include service provider, advocate, co-producer of services and strategies, source of local and historical information, campaigner and a general force for good. Risks to the sector were also listed including assumptions about voluntary organisations capacity and willingness to fill the gap left by shrinking or cut public services and navigating the procurement and contracting environment.

There are regular meetings with senior Gateshead Council officers, quarterly meetings with the Leader of Council, meetings with Gateshead Cabinet Portfolio Holders and regular mailings to councillors and meetings as appropriate.

The Chief Executive is also a member of the Newcastle Gateshead CCG Joint Integrated Care Programme Board in which she aims to reflect the views of the voluntary and community sector in Gateshead on health issues. The voluntary sector has expressed frustrations about current NHS reviews and plans (e.g. Deciding Together / Delivering Together and the Sustainability and Transformation Plan). She engages in high level discussions to promote the views of the voluntary sector and challenge some of NHS perceptions. She meets regularly with Newcastle Gateshead CCG directors on issues such as future funding (past March 2018) for voluntary organisations, information governance, and involvement and engagement.

As a member of the Blue Stone Consortium, the Chief Executive sits on the Well Newcastle Gateshead Steering Group. This has now appointed both members of staff and is ready to start investing in arts and cultural work in Felling and Chopwell to improve wellbeing and health. This will be through a mixture of commissions and grant aid. The investment is worth around £175,000 in each area (over three years).

The CVS Chief Executive meets with external funders such as staff from Big Lottery, Virgin Money Foundation, Community Foundation (Tyne, Wear and Northumberland) and others and highlights the good work that is going on in Gateshead.

During May, the Chief Executive hosted and organised a visit from Sir Stuart Etherington and Bruce Gordon, Chief Executive and Treasurer of NCVO (the leading national voluntary organisation), to Gateshead and Newcastle. Sir Stuart and Bruce visited the Comfrey Project, Gateshead Citizen Advice and Gateshead Carers. At all three organisations they held private meetings with the Chief Executive / Directors and trustees and discussed finance and sustainability, as well as visiting the premises and meeting volunteers and people who used the projects. This was important as there is a tendency for national organisations to focus on larger, national and London-based voluntary organisations. Sir Stuart will be the keynote speaker at the Newcastle CVS AGM, which is being held on 13 November, in St Mary's Heritage Centre, Gateshead.

Doing Going in Gateshead was carried out in early 2017 and the results were disseminated widely. The findings have been used by a number of organisations in their funding applications as well as by officers in strategic reports.

Headlines findings from *Doing Good in Gateshead* included:

- Funding is the most pressing issue for voluntary and community organisations
- Seven out of ten respondents noted increased demand for services
- Recruitment and retention of volunteers is the second largest area of challenge
- Two thirds of respondents had developed new service areas, projects or initiatives during the previous twelve months

The report *A Changing Wind: views from the frontline : voluntary organisations in Newcastle and Gateshead working with people with physical and sensory disabilities* was issued in March 2017 and disseminated widely. This indicated key concerns around welfare reforms for people with disabilities; the increase in levels of stress on disabled people, their carers and staff who support them and also gave some positive examples of how local organisations had changed some of their services.

The report '*Voluntary Sector Trends in Newcastle and Gateshead*' was produced in July 2017 and disseminated widely and presented to a Gateshead Council members' seminar. It is a very short paper, pulling together key trends in major local, regional and national reports and identifies the Gateshead position. It is appended for information.

4) Support and Development of the Voluntary and Community Sector

The majority of the CVS resource is focussed on this part of the contract. This enables small and local organisations to thrive, develop and become more sustainable. The three support and development staff (Gateshead Support Team) are

based in the Age UK Gateshead office. Each staff member relates to the specific five areas of Gateshead, as well as working to themes, based on their individual experience. They are backed up by the full CVS staff including Funding Advice, Governance Support, Policy, and Marketing and Communications.

This work itself involves:

- setting up local charities, community groups or social enterprises
- helping organisations identify the resources they need to develop
- supporting organisations with funding applications
- providing advice on appropriate funders
- advising on governance – how to run an organisation properly
- discussing policies and procedures and working with organisations so they understand and own these
- identifying and providing appropriate training
- connecting groups together, particularly in local areas

There is a Support and Training Programme, based on the needs identified through this work. Although each group is individual, there are common needs and themes that keep emerging. Local groups often have strong relationships, and in some cases dependence, on Gateshead Council support. As the Council Budget is decreased further, CVS staff are working with groups to make them more resilient than ever, as there is less support in the whole system.

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One of the initiatives that Newcastle CVS has introduced is inviting organisations to meet with a funder. These are invited sessions with 8-10 participants, facilitated by our staff and the funder (usually a local funder) talks about what they are looking for in applications and what they have funded. This approach can give significant insight to applicants. A recent successful event was held with the Sir James Knott Trust.

The Gateshead Support Team (the three dedicated staff members) has also become more experienced and knowledgeable. There is always access and support from the more specialist governance, policy and funding advisers, but the team are more able to deal with more complex issues. There has been a noticeable increase in the amount of support given to a smaller number of groups since July. We are not sure yet if it is 'a summer blip' or a trend.

Case Study: Gateshead Team Gym

The Gateshead Support and Development Team is supporting the community managed Team Gym Club. The club is based at the Elgin Leisure Centre and has over 100 members aged 5 – 15 years. Since an increase in the rent of 100% this club is struggling to cover its costs. Also, the current governance structure limits the Club's ability to secure grants. The support provided to date includes the following:

- Financial planning
- Advice relating to appropriate governance structure and moving from an unincorporated organisation to a Charitable Incorporated Organisation
- Consultation with members and their parents / carers
- Advice relating to funding opportunities and support with applications

Recent funding success includes a grant of £1,000 from the Community Foundation's General Fund towards the cost of new equipment. Additionally, as a result of the Club's efforts to increase the involvement of parents and carers, there is now a group of volunteers engaged in fundraising activities. This group has already raised £500 for the Club.

In terms of long term viability various options have been considered including an increase in fees and relocation of the Club. Neither of these options is viewed as desirable given the Club's loyalty to Deckham and the people from the area that use the Club. Therefore, to address the rent issue, the Gateshead Support Team is supporting applications to funders for running costs. Applications have been made to the Gateshead Housing Fund and the Gateshead Capacity Fund. The Gateshead Support Team has helped the group to achieve a meeting with Children in Need.

Future support includes work towards British Gymnastics Association (BGA) accreditation. This accreditation will need a full review of policies and procedures.

Many of the volunteers are not used to computers and digital application forms, so there has been quite intensive support given. As more funders move towards digital systems, there is concern about the groups that can't access and use digital information. Even when written forms are accepted, some groups can't fully access all the information provided online and are at a disadvantage.

This is an example of a small community group who does a huge amount of good work in a local community which has a lot of needs. The Gateshead Support Officer has been able to establish a regular and trusting relationship over time. The amounts of money requested are not very large, but will make a huge impact on the local people who use the Club.

The volunteers involved do not want to be professionals, they do not have the time or capacity; they want to do good things locally. However governance and funding requirements mean they have to engage in a particular way and it is the role of the Support Officer to help them achieve these aims.

5) Engagement, Marketing and Communication

A key strand to the work has been to underpin it with a strong marketing, communication and engagement approach. Our key e-newsletters, the fortnightly e-inform, the monthly On the Hoof, and the monthly HAREF Ebulletin are edited to include Gateshead information and profile Gateshead activities and events. Inform, the CVS quarterly newsletter, includes Gateshead organisations and the information is appropriate for them. There is a dedicated Gateshead flier, business cards, banner stands. All the material makes it clear that CVS supports Gateshead organisations and activities. Gateshead items are regularly promoted through our social media twitter accounts and Facebook.

Each Gateshead Councillor has received information and receives the quarterly newsletter and e-inform. Some councillors have signed up to On The Hoof.

There have been multiple communications aimed at voluntary and community organisations in Gateshead; letting them know about the services offered, contact details, and specific information e.g. safeguarding, ensuring Gateshead contacts and

groups are highlighted in our general communications. There have been tailored communications on other resources – Ellison Services, the Bluestone Consortium, paid for support and development services and others which could be of value to local organisations.

There have been regular meetings with Neighbourhood Management officers about further development of OurGateshead have continued. Following on from a presentation about OurGateshead to the Senior Management Team, Mark Shilcock from the Gateshead Support and Development team has undertaken a series of presentations to council teams about scope and potential of the website.

The last eighteen months have been busy, hectic, energising, challenging and rewarding. There is a vibrant voluntary and community sector in Gateshead. Newcastle CVS hopes it can continue to contribute to the activity in the future. The highlight of our time has been the Gateshead Awards ceremony and we hope to attend the one next year.

Sally Young
Chief Executive, Newcastle CVS

Voluntary Sector trends in Newcastle and Gateshead July 2017

This paper summarises current trends within the voluntary and community sector. It draws upon several sources, most of which are reports published during the first half of 2017 that offer national, regional and local perspectives on the state of the sector.

The voluntary sector makes a significant economic impact contributing £12.2bn to the UK economy; this is similar to the GDP of Cyprus. Registered charities employ a workforce of 853,000, while civil society as a whole (other not-for-profits such as social enterprises, housing associations and mutuals) employ 2.2 million paid staff, equivalent to 7% of the UK workforce.

Across the North (North West, Yorkshire and Humber and the North East) voluntary organisations employ more people than the area's financial and insurance sector. The voluntary sector's value in the North East (measured by salaries) is £750 million. The workforce is relatively stable with 37,500 full time equivalent employees, though a 10% rise between 2010 and 2016 to 45% of staff in part-time work shows a shift in working patterns.

Volunteering also makes a significant economic and social contribution. Nationally, the economic contribution of formal volunteering is estimated at £22.6bn. In the North East 150,000 volunteers deliver 10.8m hours of work at a value of £78m to £131m. 62% of the region's voluntary organisations report that many of their volunteers are currently, or have been, service users.

The Newcastle CVS reports, *Doing Good in Gateshead 2017*, and *Taking the Temperature 2016* found only 1% of Gateshead organisations and 9% of Newcastle organisations didn't use any volunteers at all. Indeed 6% (in Gateshead) and 8% (in Newcastle) had 100 or more volunteers. Gateshead Council's website notes "*Volunteering is one of our greatest assets, with 34% of Gateshead residents regularly taking part in an activity*". In Newcastle, 23% of adults told the 2016 Residents' Survey that they had volunteered in the last month.

Grant aid remains the most important source of income, especially for the region's small and medium sized voluntary organisations. Contracts remain a significant income stream for larger organisations (incomes above £500,000) but grants are regaining importance and creating more competition within the sector. The most recent North East Third Sector Trends study continues to find social finance and borrowing of marginal interest to the sector. Less than 3% of respondents reported borrowed money to be important and only 9% of the larger organisations was planning to borrow money in the next three years.

The national picture finds 81% of earned income from the public sector is from contracts or fees. The largest slice of this (42%) goes to major charities (incomes between £10m - £100m). It is worth noting the 61% growth between 2008 and 2015 of 'super-major charities' with incomes above £100m, whose share of public sector funding grew by 9% in 2013 - 2015. However the NCVO UK Civil Society Almanac reports individual donations as the largest source of income for the voluntary sector. These comprise donations, legacies, as well as membership fees, income from shops and trading.

In the North East, 42% of large voluntary organisations earn more 61% of their income. This compares to medium sized organisations earning 30% of their income, and small organisations 21% of income. The most recent North East Third Sector Trends study finds the voluntary sector resilient and not about to '*fall off a cliff*'. However it does find distribution of income within the sector is changing though as larger organisations begin to look to grants becoming a more significant part of their income stream.

A consistent theme across many recent reports on the state of the voluntary sector is a squeezed middle as medium sized organisations face increasing competition for grant aid

from larger and smaller organisations. The House of Lords Committee on Charities reported medium sized organisations having *'problems bidding for contracts, from increasing scale of contracts to reduced focus on quality and payment by results mechanisms that disadvantage smaller providers'*.

The Third Sector Trends Study indicates 32% of medium-sized voluntary organisations in the region have used reserves for essential costs. 83% of Gateshead respondents and 80% of Newcastle respondents said that without additional income they would use all their reserves up in less than 12 months. The House of Lords (HoL) Committee describes charities as the *'eyes, ears and conscience of society'*. However it also makes clear that *'the environment in which charities are working is altering dramatically'*.

Some of the challenges facing the voluntary sector are down to its own mixed performance, for example in the take up and use of technology and digital platforms. Another area highlighted for improvement is the diversity of trustee boards. Additionally the HoL Committee states more support is needed to increase the ability of trustees to provide the leadership and direction necessary for a sustainable future.

The HoL Committee report claims that against a background of lost income (since 2009/2010) small and medium charities are struggling to adapt to changing circumstances. The Road Ahead (NCVO) and Facing Forward (Lloyds Bank Foundation) both look at the challenges for the sector and what voluntary organisations can do to adapt and respond to them.

Facing Forward is concerned specifically with small and medium voluntary organisations. It lists ten trends to watch including Brexit, a slowing economy, changing public sector and public services, digital technology, social division, public trust in charities and the Government's vision for civil society. It includes seven steps to help organisations prepare for the future include diversifying funding streams, collaboration, better use of technology and planning for the future with care. This last step means asking questions about how organisations can best meet their charitable aims with options including merger or closure.

The Road Ahead focuses on a number of structural factors some of which directly affect voluntary organisations, for example funding and charity regulation. Others have wider impact on beneficiaries and communities. These include rising prices, stagnant incomes, Brexit, political (and economic) uncertainty and the sector's relationship with Government. NCVO calls for a resetting of the voluntary sector relationship with (central) government. It notes that anti-voluntary sector rhetoric from the Government and its supporters, the Lobbying Act, anti-advocacy clauses in contracts have led to an all-time low in the relationship between the Government and the sector.

The final report from the Independence of the Voluntary Sector Panel highlights a drop in trust among the general public, largely as a result of poor fundraising practices among some very large national and international charities. The Panel also cites uncertainty about the Government's intentions towards the sector and asks whether Theresa May's ambitions to create a Shared Society and to tackle burning injustices will have more substance than David Cameron's Big Society; questions that have all been thrown into the air as a result of June's General Election.

Sources

- A Shared Society, the Independence of the Voluntary Sector in 2017, Civil Exchange, 2017
- Doing Good in Gateshead, Newcastle CVS, 2017
- Facing Forward, Lloyds Bank Foundation, 2017

- Stronger Charities for a Stronger Society, House of Lords Select Committee on Charities, 2017
- Taking the Temperature, Newcastle CVS, 2017
- The Road Ahead : a Review of the Voluntary Sector's Operating Environment, NCVO, 2017
- The UK Civil Society Almanac 2017, NCVO and Cazenove Capital, 2017
- Third Sector Trends in the North of England, IPPR North, 2017
- Third Sector Trends in North East England 2016 (key findings), Chapman et al for Community Foundation (Tyne, Wear and Northumberland), 2017