

Vital ingredients when collaboration and merger are on the menu

A London Voluntary Service Council
& Voluntary Sector Forum
case studies report

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1. Introduction

There are many pressures being exerted on voluntary and community sector (VCS) organisations to work in partnership, develop consortia, work more collaboratively, share services and merge. These pressures come from funders, politicians and the current economic situation. They influence funding decisions and express political ideology. They also come from within the VCS itself.

Collaborative working and merger can be extremely beneficial and improve services, resulting in more cohesive delivery that avoids duplication and saves money. Most importantly, it can help to provide service users with better services that most effectively meet their needs.

The overall aim of this London Councils' funded project is to produce a report reviewing examples of VCS organisations that have merged, worked collaboratively or shared services in order to support Voluntary Sector Forum (VSF) members in a time of financial uncertainty. The project will also inform London Voluntary Service Council's (LVSC) work under Transforming Local Infrastructure¹ funding.

The objectives are to:

- Review models across the spectrum of collaboration and partnership working from shared services to full merger
- Produce case studies of VCS organisations that have merged, worked collaboratively or shared services
- Review the learning from these examples
- Make recommendations for VCS organisations, policymakers and funders
- Launch and publicise the report with VSF members, policymakers and funders

All the case studies presented in this report provide lessons that can be taken and used by anyone looking to work better together.

What is clear from all the case studies is that working together, collaborating and merging is a process that evolves over time. It doesn't just happen and is then over: even when a merger fails, there is still work to be done. The key finding from all the case studies is that it takes huge amounts of time, energy and resources to work collaboratively and/or to merge. To think that it is somehow an instant money saver is a myth.

The economic climate of recession and public funding cuts makes it inevitable that more organisations will have to think about merger more seriously if services that beneficiaries rely on are to survive. Merger might be the answer for some organisations but other forms of collaboration that

¹ http://www.biglotteryfund.org.uk/prog_transforming_local_infrastructure

ensure that both specialist and generic services remain viable might be a more appropriate solution for others.

1.1 Policy context

This continues to be a difficult time for London's VCS. This year's fourth LVSC Big Squeeze² survey (2012) shows that London's communities and the VCS groups that support them continue to suffer as spending cuts and new policy initiatives bite. There is less money around, higher demand for services and so, pressure for more efficient ways of working. However, the sector is showing flexibility and initiative in fighting to keep services going for its users in these hard times.

LVSC's survey reinforces other research and analysis showing more and more cuts to the services that people need, especially preventative services. Londoners are also affected more negatively than those in other English regions by recent welfare reforms and worse unemployment. The longer-term social impacts of these, such as worsening health, poverty, debt and crime are increasingly being reported by the capital's VCS organisations.

Big Squeeze (2012) results show that 90% of organisations are making organisational changes to cope with the public spending cuts, recession and reforms. 47% are working in collaboration with other VCS organisations; 23% are working in collaboration with private sector organisations; 17% are sharing back office functions with other organisations; 48% are doing more informal partnership work; and 11% are considering merging with another organisation. In 2010-11 none of the respondents said that they were considering merger with another organisation.

A Charity Commission survey published in March 2010³ found that 9% of charities said they had considered merger, collaboration or forming a consortium compared to 3% in February 2009⁴.

Third Sector's State of the Sector survey⁵ in December 2011 found that 23% of those surveyed said they had considered merger, collaboration or forming a consortium.

In the Big Squeeze survey, when asked what support organisations needed to respond to economic and/or policy changes; organisations cited help

² Big Squeeze research looks at the impact of the recession and public spending cuts on

³ *4th Economic survey of charities*, Charity Commission, 2010, http://www.charitycommission.gov.uk/Charity_requirements_guidance/Charity_governance/Managing_resources/economic.aspx

⁴ http://www.charity-commission.gov.uk/RSS/News/Archived_press_releases/downturn.aspx

⁵ <http://www.thirdsector.co.uk/Governance/article/1155693/analysis-charity-mergers-finding-shared-vision/>

with fundraising, lobbying or campaigning for sustainable funding/contracts, and demonstrating impact most often. A close 4th at 43% was the need for more support with collaboration and partnership working; 21% needed support with consortia development and 11% with mergers. In addition, 27% wanted more support to work with the private sector.

This years' survey showed that in 2011-12:

- 60% of respondents had seen a reduction in their overall funding
- 41% had closed services over the year
- 54% had had to use free reserves to cover running costs and
- 90% had changed the way they work to adapt to less funding and increased demand for their services so that they could still meet their users' needs

The policy environment in which London's VCS organisations work continues to be one of constant change.

The following summarises those policy issues:

- London's VCS has seen disproportionate cuts in funding (26% cuts to local authority funding of the VCS compared to 9% to local authority funding) since 2010⁶
- London groups are more dependent on public sector funding (especially in deprived areas and amongst those working with the most socially excluded)⁷
- Welfare reform (such as the cap on housing benefit and the introduction of Universal Credit) will see increasing poverty. There is already evidence that more people are accessing food banks in the capital⁸
- London is the region most affected by housing benefit cuts resulting in more homelessness, overcrowding and people moving to cheaper boroughs⁹

⁶ LVSC 'VCS funding cuts report 2012' a working document

⁷ TSRC 'Voluntary organisations working with deprived groups most likely to be reliant on public funding'.

<http://www.tsrc.ac.uk/NewsandEvents/dependenceofthirdsectoronpublicfunding/tabid/742/Default.aspx>

⁸ Guardian, 'Demand for food parcels explodes as welfare cuts and falling pay hit home: early-warning indicator should set alarm bells ringing about poverty levels', <http://www.guardian.co.uk/society/2012/jun/25/breadline-britain-growth-food-parcels>, June 2012

⁹ Navigant Consulting, 'Does the cap fit? an analysis of the impact of welfare reform in London: a research report commissioned by London Councils', 2011

- Advice services have been hit hard by cuts in funding at the same time as experiencing a large increase in demand¹⁰
- There have also been cuts to legal aid¹¹, which have further impacted on advice services
- London has the greatest need for advice services, but will be the greatest loser in legal aid cuts¹² with
- 77,000 Londoners predicted to lose housing, employment, debt, welfare benefits and immigration advice¹³
- Londoners will lose £9.33million in funding for housing, employment, debt, and welfare benefits law cases. It is estimated that this will cost the government £55million in other expenditure¹⁴
- Children and young people's services have also been disproportionately cut¹⁵
- London's child population is growing (0-4 year olds rising by 12% from 2008-33)¹⁶
- There will be a shortfall of 70,000 school places in the capital in the next four years¹⁷
- Youth unemployment in London affects one in four (against one in five nationally)¹⁸
- Local authorities account for at least 60% of funding for children and young people's services in London¹⁹
- The end of the Educational Maintenance Allowance and changes to student grants are reducing young people's aspirations to continue into higher or further education²⁰
- The huge re-structuring of the NHS and £20 billion efficiency savings have created major upheavals across the health and social care system²¹

¹⁰ LVSC, Big Squeeze, 2012

¹¹ Justice for All, 'Advice needs: what local advice charities need to continue serving their communities', 2012

¹² Trust for London, London Advice Watch, 2012

¹³ Ibid

¹⁴ Ibid

¹⁵ LVSC, Big Squeeze, 2012

¹⁶ London Funders, 'Less than the price of a 1st class stamp: children and young people', 2011, <http://www.londonfunders.org.uk/what-we-do/funding-landscape-2012/childrens-and-young-peoples-services>

¹⁷ Ibid

¹⁸ Ibid

¹⁹ Ibid

²⁰ LVSC, Big Squeeze, 2012

²¹ The King's Fund, 'The voluntary and community sector in health: implications of the proposed NHS reforms', 2011, <http://www.kingsfund.org.uk/publications/voluntary-and-community-sector-health>

- Spending by local authorities on older people's services in London has shrunk, despite increased numbers of older people in the capital²²
- Increasing unemployment since the recession began (London has the highest unemployment rate of all regions) at the same time as the introduction of the Work Programme has reduced referrals to specialist VCS employment and skills support for those furthest from the labour market²³
- VCS equalities groups in London have been disproportionately cut²⁴
- VCS infrastructure support has also been disproportionately cut (almost twice VCS frontline cuts) while demand increases²⁵

1.2 Rationale

The evidence cited above from LVSC's Big Squeeze research suggests that London's VCS requires much greater support around the issues of collaboration, partnership working and merger, as public spending cuts continue. This is particularly the case for small specialist and equalities and infrastructure organisations.

This, combined with the economic and political drivers, makes it inevitable that partnership, collaboration and merger are more on the agenda than ever before, if VCS services are to be maintained as resources are reduced and demand increases.

A further reason why LVSC has focussed on this project is that VSF members have consistently told us that support for partnerships, mergers and collaboration is something they would value. In addition, the latest London Borough Grants Scheme application process has emphasised the importance of partnership working amongst London's VCS organisations.

²² Age UK London and Greater London Forum for the Elderly, 'Don't cut care in London', 2011

²³ London Skills and Employment Observatory, 2012, <http://lseo.org.uk/>

²⁴ LVSC, Big Squeeze, 2012

²⁵ Ibid

1.3 Defining terms

The report focuses on VCS collaboration and acknowledges that there is much useful work on VCS/public sector and VCS/private sector collaboration that lies outside the scope of the project. The report adopts the following definitions in order to set the parameters for the project.

Merger

The Institute for Voluntary Action Research (IVAR) says that there is no single agreed definition of merger. “It can be understood as a formal long-term arrangement to work collaboratively”²⁶. The Charities Act 2006 defines merger as “one or more voluntary organisations passing its assets to another voluntary organisation and then dissolving...or two or more charities passing their assets to a new voluntary organisation and then dissolving”.

Using these definitions this report understands that merger happens over time, is a formal collaborative arrangement, usually accompanied by changes in the legal and governance arrangements and involves a process by which one or more organisations come together and during which one or more organisations dissolve.

Collaborative working

This report takes collaborative working to be “joint working by two or more charities in order to fulfil their purposes whilst remaining as separate organisations”²⁷ They do this “to enable a greater overall output than if they pursued the activity alone”²⁸.

Partnership working

This report adopts The Prince’s Trust²⁹ definition of a partnership that is based on that set out by the Audit Commission, which states that partnership can be defined as a working arrangement where the partners:

- Are otherwise independent bodies
- Agree to co-operate to achieve a common goal
- Create a process to achieve this goal
- Plan and implement a jointly agreed programme, often with joint staff or resources
- Share relevant information

²⁶ IVAR, ‘Thinking about merger’, p8

²⁷ Charity Commission, ‘Collaborative working and mergers’, p6

²⁸ Bassac, ‘Sharing without Merging’, 2005

²⁹ The Prince’s Trust, ‘Making partnerships work: a study of partnership working in The Prince’s Trust and a practical guide to building and maintaining effective partnerships’, 2005

- Pool risks and rewards

This report takes collaboration to be a more general catch-all term that includes partnership working.

1.4 Literature and research

There is a wealth of literature on this subject stretching back many years. IVAR in particular has looked in depth at the topic of merger and collaboration and this report does not intend to duplicate that work. However it will highlight some key work and provide a bibliography (see Appendix 1) of all the literature found during the desk based research.

There are many drivers towards more collaborative working, partnership or merger. However, it is important to underline that, as IVAR states, “the primary purpose for a merger should be to better meet the needs of the beneficiaries or users of all the charities involved, and make best use of their charitable funds and property”.³⁰

In addition IVAR lists seven other major reasons why VCS organisations consider merger³¹:

- To meet user’s needs more effectively
- To reduce the vulnerability of smallness
- To address financial pressures (uncertain and scarce resources; pressures arising from commissioning and contracting; funder pressure)
- To solve governance problems
- To be more able to influence the external environment
- To broaden the organisation’s offer
- To build on a successful history of collaboration

Often a number of these are involved in the final decision to undertake a formal merger.

NAVCA research³² states that the merger of five Councils for Voluntary Service (CVSs), that resulted in a new, larger merged organisation, Cumbria CVS, was an “incremental evolution from informal collaboration to full merger over a significant period of time”. In fact it took three years dedicated development following 15 years of collaboration between the organisations involved.

³⁰Charity Commission, ‘Collaborative working and mergers’

³¹ IVAR, ‘Thinking about merger’

³² NAVCA, ‘Anatomy of a merger: the Cumbria experience’, 2007

Cumbria CVS came about over a long period of time. “In 1989 the district CVSs, Voluntary Action Cumbria and other infrastructure bodies came together informally to discuss issues of mutual concern and interest”. This ‘coming together’ was formalised in 2003 by the registering of a company limited by guarantee which became a ‘testing ground for merger’.

Key drivers for the merger of Cumbria’s CVSs were “to improve infrastructure service provision by better use of resources” as well as maximising opportunities for funding. The merger provided the opportunity to harmonise the delivery of generic organisational support across the county, resulting in economies of scale that allowed for specialist expertise to be added across the new organisation. It is interesting that this merger was not driven by the need to make cost savings and yet benefited from them in the end.

Although partnership working is often less formal, The Prince’s Trust³³ draws conclusions that demonstrate that partnership working is still a significant move for organisations. They state that:

- Partnerships, when effective, can lead to service improvements
- Partnerships are time consuming, complex and require a great deal of commitment in order to be effective
- Organisations must be selective, learn how to forge appropriate partnerships and recognise which ones will be of most benefit to the organisations involved and, most importantly, to their beneficiaries
- Complex issues remain, even once a partnership has been developed and more support is often required to take the partnership forward
- Models for funding bids need to reflect the time it takes to plan and agree good quality partnerships
- Guidance is needed on the legal implications for joint-work because organisations remain wary about sharing risk
- Because data sharing is problematic for the VCS, government should work with the sector to develop greater data sharing within and between sectors

1.5 Due diligence

‘Due diligence’ is a phrase that describes the steps organisations take to assure themselves that a merger, or other change in working pattern, is in their best interests. One charity (or an independent facilitator) examines

³³ The Prince’s Trust, ‘Making partnerships work: a study of partnership working in The Prince’s Trust and a practical guide to building and maintaining effective partnerships’, 2005

one or more other charities before the completion of the merger. The result of the exercise is that a charity has full knowledge of the organisation(s) they seek to merge with to ensure that there are no surprises, each having a full understanding of the benefits and costs of moving forward in this new direction. Due diligence checks fall into three main areas; commercial, financial and legal³⁴. Charity Commission guidance lists the steps you need to go through during the process of due diligence³⁵.

NCVO guidance³⁶ indicates that much of the advice on due diligence during merger processes is equally applicable to collaborative working.

1.6 Shared services and sharing back office functions

A distinction needs to be made between:

Sharing (delivery of) services - the case study on the secondment of the Head of Policy from Advice UK to Action for Advocacy is an example of a shared policy role that results in the shared delivery of a service to members from across two organisations.

Sharing back office functions – sharing functions such as ICT, HR, finance or health and safety. One example of sharing back office functions is the option of using a cloud system to share ICT across compatible organisations.

Many organisations are now outsourcing these functions or coming together to share officers (e.g. finance) or an outsourced contract across organisations. Age UKs in West London are discussing sharing these kinds of functions to deliver better services to older people and to save money across organisations. Of course, it is acknowledged that organisations need to invest in order to make effective savings.

³⁴ The Charity Commission has a very useful checklist: <http://www.charity-commission.gov.uk/library/chkduedil.pdf>

³⁵ Ibid

³⁶ NCVO, 'Due diligence demystified: what it is and how you manage it', 2006

2. Method

The research methods adopted in producing this report involved:

- Desk based research – two phases
 1. Review of literature
 2. Review of models of collaboration
- Semi-structured interviews of senior staff in organisations where collaboration work or merger had been carried out
- The sample was chosen through the researcher's knowledge and in consultation with VSF and HEAR³⁷ steering groups and other colleagues in the sector
- All interviewees were asked the same questions:
 1. Why merge/work collaboratively?
 2. What model did you use?
 3. What are the benefits for service users?
 4. What challenges did you face?
 5. What lessons did you learn?
 6. Do you have any tips or advice?
- Development of case studies, through consultation with interviewees
- Report drafting and review

³⁷ HEAR is the London network of equalities organisations. For more information go to <http://www.lvsc.org.uk/policy-areas/equalities/hear.aspx>

3. Review of models of merger and collaborative working

Merger

There is no legal definition of a merger and the term is used to describe a range of processes. Some mergers may be better referred to as takeovers. NCVO³⁸ describes two models of full merger.

Model A is where “both/all organisations transfer their staff, assets and activities to a new organisation with similar objectives and then the original organisations wind up” as in the case study of Disability Rights UK.

Model B is where “organisation A continues and other organisations transfer staff, assets and activities into organisation A before winding up” as in the case study of Harrow Association of Disabled People.

There are options where one or all organisations dissolve involving³⁹:

1. Taking the name of one of the merging charities (i.e. Harrow Association of Disabled People)
2. Combining names (i.e. Age UK Kensington and Chelsea incorporating Sixty Plus)
3. Taking a completely new name (i.e. Disability Rights UK)

Group structure

This model is an alternative to merger and allows a parent body to govern subsidiaries that retain a good deal of their independence and crucially their legal identity. This arrangement may be used as a step on the way to full merger.

“One example of group structure is where organisation A becomes a holding company for organisation B. This structure can be used to maintain the services organisation B provides whilst creating a ‘firewall’ between the organisations. There may be some transfer of senior staff, assets or projects, but organisation B continues to operate as a separate legal body, albeit one controlled by the trustees of organisation A”⁴⁰.

Organisations have adapted this group structure model differently in the case studies. Carnival Village has chosen to create a new entity as a holding company and retained the separate Boards of each of the organisations in the group plus a Board for the holding body. Age UK East London has also

³⁸ NCVO Collaborative Working Unit, ‘Merger: a model of collaborative working’, 2006

³⁹ The Centre for Voluntary Action Research

⁴⁰ NCVO Collaborative Working Unit, ‘Merger: a model of collaborative working’, 2006

followed the holding body model but created one Board for the ‘uniting direction by common trusteeship’ model that it has adopted. Finsbury Park Homeless Families Project has become a subsidiary of another larger organisation, retaining its independence to some extent, and the model only has one Board.

Collaborative working

Collaborative working is a ‘catch all’ term that includes partnership working. Most VCS organisations say that all the work they do is in partnership or takes a collaborative approach.

These partnerships may be informal such as putting on one-off events, coalitions forged to campaign together in the short-term or may be more formalised with partnership agreements. There is no one model that suits everyone. This creativity and innovation is one of the hallmarks of the VCS.

Because of the wide variety of collaborative work it is more difficult to provide a model A, model B, model C description. This review will look at a range of collaborative ways of working.

IVAR ⁴¹ provides a very broad definition of collaboration that includes “all kinds of interactions across the boundaries of two or more organisations; from temporary cooperation, strategic alliances and consortia through to takeover and merger”.

Bassac⁴² says that “collaboration is as much about outsourcing⁴³ as it is about developing any other form of collaboration, for example strategic partnerships, coalitions, joint ventures or shared services”.

Bassac’s report lists four groups of models of collaborative working projects in the VCS on a spectrum from short term collaboration projects with a single, defined deliverable; through long-term collaboration with standalone activities and some shared objectives; to permanent collaboration, separate budgeting and complex and varied deliverables. They break this into four groups:

Group 1

- Networking groups
- Umbrella groups and membership organisations
- Affinity schemes for discounted purchasing

⁴¹ IVAR, ‘Thinking about collaboration’, 2011

⁴² Bassac, ‘Sharing without merging: a review of collaborative working and sharing back office support in the VCS’, 2005

⁴³ Outsourced and shared services often focus on operational functions such as HR and IT. The drive is to reduce costs.

Group 2

- Joint research and development projects
- Joint trading groups

Group 3

- Buying groups
- Lobbying groups
- Fundraising groups
- Sharing building facilities and space
- Organisational incubators⁴⁴

Group 4

- Outsourcing services to a corporate or private sector organisation
- Outsourcing services to a VCS organisation
- Creating a separate organisation to provide services to shareholding partners and possibly to third partners (also called Shared Services or Management Services Organisation)

Bill Mathers' categorisation⁴⁵ takes a more outcomes focussed approach to collaboration within the VCS but also categorises four levels of engagement:

- Joint benefit – active co-operation between organisations in operational activities e.g. networks
- Joint project – co-operation between organisations to achieve common objectives e.g. campaign alliances or joint event
- Joint management – builds on the joint project level by operating a joint management structure e.g. housing associations within group structures
- Joint strategic development – development and implementation of plans and priorities leading to inter-dependency. Long term collaboration to fulfil missions but preserving organisational identity

Charity Commission guidance⁴⁶ helpfully gives three common structures for collaborative working in a formal way:

1. Group structure – a formal association of separate organisations

⁴⁴ Where an organisation 'hatches' another organisation

⁴⁵ Mathers, B, 'Merging Interests', 2000

⁴⁶ Charity Commission, 'Collaborative working and mergers', 2009

2. Affiliated or federal structure – a parent body offers support, strategic and central services to its members of affiliated bodies
3. Coalition structure – a group of charities work together for a common purpose

The guidance also provides models of formal collaborative working arrangements through:

- Contracts
- Service level agreements; and
- Memoranda of understanding

Examples have also been provided of models that work well for particular sub-sectoral services. For example, a model of collaboration that focuses on women in the criminal justice system (ex-offenders, those at risk of offending and women with multiple needs) is provided in The Corston Report.⁴⁷ The report recommended services in women's centres (such as Asha in Worcester) to provide alternatives to custodial sentences for women. Another example, Calderdale Women's Centre, is adapting a MARAC⁴⁸ model to ensure the provision of women centred services. This model is particularly appropriate for these services as it empowers and supports women to make decisions and choices for themselves.

A small Black, Asian and minority ethnic (BAME) organisation in London, Mosaada, is working on developing a similar collaborative hub to help women leaving prison with issues such as employment, skills, training and self-esteem.

However, the arguments for and against collaboration are again illustrated by the fact that women's centres may be appropriate in some cases, but not all. Many in London's VCS argue that specialist women-only services that are targeted towards specific communities of women are vital for the women that access them and the diversity and strength of the sector. They express concern that collaboration may weaken these specialisms.

Specialist provision and collaboration are the subjects of Voice for Change England's project 'modelling fair and equitable collaborations'⁴⁹ that directly supports and encourages mainstream and BAME organisations to build collaborations and partnerships to support the continued provision of specialist services. One of the main aims of this project is to break down the barriers that "prevent London's BAME and mainstream VCS

⁴⁷ The Corston Report: a review of women with particular vulnerabilities in the criminal justice system, Home Office, 2007

⁴⁸ Multi-Agency Risk Assessment Conference, a public sector model where information about high risk domestic abuse victims is shared between local agencies

⁴⁹ V4CE, 'Barriers to collaboration and partnerships between BME and mainstream organisations in London', 2012

organisations with common aims from delivering better and sustainable joined-up and cohesive services to local communities”.

Key findings published in their 2012 report are that there are barriers to collaborations between BAME and mainstream organisations, such as the capacity of BAME organisations to engage in partnerships; a low profile and reputation of BAME organisations that reduces their visibility; different organisational cultures; ideological and political factors; and issues of trust and control between small and large organisations.

Race on the Agenda’s (ROTA) Female Voice in Violence Coalition (FVV)⁵⁰ was set up to monitor progress on the recommendations made in the London Female Voice in Violence (FVV) Report (February 2010)⁵¹. The coalition has 16 members and aims to progress with these previous recommendations by:

- Developing further support for the recommendations of the FVV report
- Engaging in and influencing policy development
- Building on the evidence base produced in the report
- Seeking to work in partnership to develop specialist services and events
- Representing the views of the FVV report to decision-makers

The case studies presented in this LVSC/VSF report look at seven different models of collaboration and partnership including:

- Informal partnership working
- Secondment
- Inter-agency working
- A women’s centre
- A coalition
- A consortium
- Networks

⁵⁰ In partnership with Imkaan and nia

⁵¹ <http://www.rota.org.uk/content/female-voice-violence-events-and-publications>

4. The case studies

This section presents 15 case studies in total.

Part 1: Mergers

Four case studies:

- [Age UK Kensington and Chelsea \(incorporating Sixty Plus\)](#)
- [Disability Rights UK](#)
- [Harrow Association of Disabled People](#)
- [A failed merger](#)

Part 2: Group Structures

One case study:

- [Carnival Village](#)

Two case studies that describe other forms of formal collaboration that are not full merger but are similar to group structures:

- [Age UK East London: uniting direction through common trusteeship](#)
- [Finsbury Park Homeless Families Project: subsidiary agreement](#)

Part 3: Partnerships and collaboration

Seven case studies:

- [Nia and The Children's Society: partnership working](#)
- [Advice UK and Action for Advocacy: secondment](#)
- [Solace Women's Aid: inter-agency working](#)
- [Eaves, Scarlet Centre: a women's centre](#)
- [End Violence against Women: a coalition](#)
- [Pan London violence against women and girls \(VAWG\) Consortium \(facilitated and co-ordinated by Women's Resource Centre\)](#)
- [Voluntary Sector Forum and HEAR: networks](#)

The final case study presents an alternative to merger or collaboration, for an organisation that could not find an appropriate partner and so moved forward by changing its name and mission, to more effectively meet user need and going it alone.

- [Evolution of London Irish Women's Centre to Mind Yourself](#)

The case studies are all different but all present the background to the collaboration; the process; challenges; and lessons learned.

Semi-structured interviews for all the case studies took the same format and asked the same basic questions as outlined in the method section:

- Why merge/work collaboratively?
- What model did you use?
- What are the benefits for service users?
- What challenges did you face?
- What lessons did you learn?
- Do you have any tips or advice?

Part 1: Mergers

Age UK Kensington and Chelsea and Sixty Plus: merger



Photo: Age UK Kensington & Chelsea and Sixty Plus ©

Background

In 1998, when Cynthia Dize (now Chief Executive of the merged organisation) first came to Sixty Plus it was a small grassroots organisation which focussed on volunteer involvement, community development, health promotion and inter-generational work. At the time Kensington and Chelsea Age Concern⁵², was a larger organisation that saw the future in contract delivery, had expertise in dementia, had already won a large personal care contract and provided a dedicated information and advice service.

There were particular risks for Sixty Plus in considering any merger with Age Concern Kensington and Chelsea, such as losing its name, which would have been a big wrench for both the organisation and the trustees. The loss of the name might have meant a loss of trust by service users and that special grassroots focus.

Decision to merge

In this case merger was “the intelligent thing to do” as Cynthia says. Merger would benefit service users and crisis wasn’t forcing the situation. Both Age Concern and Sixty Plus were getting funding from the local authority, which stood back and let them get on with it. In addition, there was no time pressure.

⁵² Age Concern England merged with Help the Aged in 2009 and became known as Age UK in April 2010

The key issue that underpinned the process from initial discussions through to full merger was to ensure a benefit for the service users. The bottom line was always – “will it produce a better service for service users from low level help to intensive dementia support?” It was also obvious that efficiencies needed to be made.

So the decision to merge was primarily to benefit older people in Kensington and Chelsea and secondarily to save money.

The merger process began in 2008 and after 15 months the two organisations officially merged in April 2009. There were no redundancies because there were no duplicated services.

The merger process involved carrying out SWOT⁵³ analyses and consultation with funders and other stakeholders.

Having merged, the first two years were the most difficult. For example, integrating areas of work such as dementia and health promotion proved complicated as it involved linking the work of many volunteers with that of paid staff from the two organisations.

The merged organisation has now trebled in size in terms of staff (60⁵⁴), turnover is now £1million per year and the merged organisation now runs many additional projects.

Why this model?

This model was preferable in this example because it simply merged two organisations into one. In this case Sixty Plus merged into Age UK Kensington and Chelsea and the choice of name meant that the trust that service users had for Sixty Plus as well as its reputation were retained.

Benefits

The huge benefit of the process was that post merger all the expertise was now in one organisation and service users only needed to contact one place so there was no chance of getting passed from one agency to another.

An additional benefit was that the merged organisation, Age UK Kensington and Chelsea (incorporating Sixty Plus), is now affiliated with Age UK and receives benefits such as:

1. Using the Age UK brand name, which is widely recognised.
2. Free Age UK information leaflets on a wide array of subjects.
3. Support for campaigns through publicity material.

⁵³ Strengths, weaknesses, opportunities and threats

⁵⁴ 35 permanent staff and 25 sessional care assistants in the home care service

4. Specific expertise and areas of work provided by the national body.
5. Chief Executive Officer (CEO) meetings providing opportunities to learn from good practice and link with other Age UKs.
6. The possibility of claiming legacies through the national Age UK body.

Lessons:

1. Assess and understand the culture of organisations to be merged early on in the process. Look at attitudes to fundraising, external relations, community and corporate status as well as attitudes to change, which can all differ from organisation to organisation.
2. Pay attention to the feelings/the emotional aspects of people management early on. There was a lot of anxiety at Age UK Kensington and Chelsea, but less so at Sixty Plus because they knew Cynthia was there throughout the process and was going to stay. Interestingly, very few of the old Age UK Kensington and Chelsea staff have stayed, which shows that the attention paid to people management at Sixty Plus paid dividends in retaining trained and experienced employees.
3. Assess the internal systems and processes (i.e. the way the merged organisation will work) to support growth early on in the merger process.
4. Make sure trustees are fully behind the merger. This process merged both Boards into one and both were very supportive throughout, which made for a much easier transition.

Disability Rights UK: merger

Background

Disability Rights UK is a disabled people's organisation⁵⁵ resulting from the merger of Royal Association for Disability and Rehabilitation (RADAR), Disability Alliance (DA) and National Centre for Independent Living (NCIL).

RADAR was an umbrella organisation which worked with and for disabled people to remove structural, economic and attitudinal barriers. It campaigned and produced policy statements and briefings on particular issues and provided support services for member organisations.

⁵⁵ 11 of its 12 trustees are disabled people



Photo: Birmingham Culture ©

DA was a membership organisation which highlighted the links between disability and poverty and worked towards improving the living standards of disabled people. It provided information on social security benefits and tax credits to disabled people, their families, carers and professional advisers and undertook research into the needs of disabled people. DA was the former publisher of the Disability Rights Handbook.

NCIL was a charity which promoted independent living for disabled people. It provided information, training, expertise and policy development on all aspects of direct payments and independent living for disabled people.

Decision to merge and merger process

“The main driver for merger was financial”, says Lesley Baliga, the Director of Finance and Resource, “the three organisations were not sustainable alone, there had to be cost savings”. Lesley was brought in to oversee the merger in August 2011 and the three organisations became one on January 1st 2012.

Radar was the biggest organisation and had a wide remit that had already taken on independent living work (NCIL’s core activity) and ending disability poverty (DA’s key area). Radar had growth aspirations and their growth strategy began to tread on toes. In 2008 the three organisations started talking more about working together and agreed not to compete for the same funding streams.

Sue Bott, the Director of Development at the merged organisation says that taking on an independent facilitator for the process was very helpful. “An independent facilitator can get people to say the unsayable”, she says “they can challenge without damaging relationships and that helps to make partners more accountable”.

In January 2010 the CEOs and trustees had an away day where no one could agree to full merger so they decided to adopt what Sue describes as a ‘try

before you buy' approach. The idea was to work together on a few projects and, if it went well, go for full merger. However on moving forward it was soon realised that the business plan they had devised wasn't going to save any money - in fact it was increasing cost.

Following this, the three CEOs had a constructive meeting where they openly and honestly discussed frustrations, particularly the lack of agreement between CEOs and trustees from the different organisations about the best way forward. The CEOs then went to trustees to say 'try before you buy' wasn't going to work and that the commitment to a full merger was the best solution for their beneficiaries. Eventually, all three boards agreed and the idea to merge was put to respective Annual General Meetings (AGMs) in autumn 2010. The final decisions to merge were taken a year later in autumn 2011.

The majority of the work required to merge was done between October 2010 and 2011. Committees for each of the eight work streams were established to address:

- Communications
- Risk
- Resources
- Premises
- Fundraising
- Due diligence
- Vision, mission, values and priorities

The decision to merge the three organisations into Disability Rights UK had considerable legitimacy because of the investment in consultation across all the organisations and their members.

Lesley arrived in August 2011 and her job was to work with other staff to ensure that the merger happened. There was a big exercise to address Transfer of Undertakings (Protection of Employment) (TUPE)⁵⁶ regulations that Lesley had to manage. "A lot of time, money and energy has been invested in this merger", Lesley says and suggests that some things could have been done more simply and that would have saved them money. Only five members of staff were made redundant during the TUPE process and Disability Rights UK now has 35 staff.

⁵⁶ The Chartered Institute of Personnel Development says that The Transfer of Undertakings (Protection of Employment) Regulations 2006 apply to what are known as 'relevant transfers' which may occur in a wide range of situations. The two broad categories are business transfers and service provisions changes.
<http://www.cipd.co.uk/hr-resources/factsheets/transfer-of-undertakings-tupe.aspx>

Lesley says that the merger journey has not ended yet and they are now working on translating the business plan into operational reality, whilst still working on policies and procedures for the new organisation. “Solid foundations are important for a successful merger” she says.

Both Sue and Lesley talk about the process of change being very demanding on staff but now people are working well together and the organisational cultures are integrating successfully. As with the entire process it takes time for such merging of organisational cultures to happen. Both say that paying attention to the emotional side of things for staff and trustees is very important.

Lesley says “focusing now on what we’ve achieved is really important. The first year is bedding down and identifying what people want from us”.

The key piece of work for the new organisation now is defining its new remit and clearly communicating it to the outside world. They also need to work on integrating the memberships of the three legacy organisations, which consist of both individuals and organisations.

Benefits

The new organisation will benefit disabled people by providing a stronger, more influential voice. As Sue Bott (who was there throughout the entire process) says;

“It will be harder for the government to ignore us, the organisation will work more effectively and the sum of the parts makes for a better whole”.

Lessons

1. It doesn’t happen overnight. The merger process itself took a year but initial working together began in 2008 and work on the new organisation’s remit is on-going.
2. If the merger involves membership organisations make detailed plans for the integration of those memberships early on. Also make detailed plans for the remit of the new charity and the day-to-day reality of the merger. Make sure that all policies and procedures are in place before merging.
3. Lesley suggests that her post might have started sooner in order to enable the detailed policies and procedures, and new systems, to have been developed prior to integration.
4. Lesley suggests that some external objective challenge (from someone not involved in the process), over and above the independent facilitation mentioned might have been helpful.
5. Trust is vital. Sue said that this merger process wasted a lot of time and paper work through organisations not trusting each other and not being

open enough. This was addressed when the CEOs came together to agree to proceed in a more open way.

6. Trustees must be kept fully informed and must be committed to the merger so that things happen more quickly and more effectively. This can only be done through regular briefings and meetings between senior staff and trustees and ensuring that trustees are convinced of the benefits of merger in the first place.
7. Get the right facilitator. Sue says you need someone who knows the VCS well, is a driven person, is committed, is independent and understands the organisations involved and the sector the organisations are working in.
8. The independence of the facilitator is essential. A mistake was made in this example when the independence of the facilitator was blurred. The CEO of Disability Alliance left and was not replaced, the facilitator then took on that role and tensions arose

Harrow Association of Disabled people: merger

Background

Angela Dias is the Director of Harrow Association of Disabled people (HAD) and describes a very positive but challenging experience of the merger processes she oversaw. Angela has been at HAD since 2006 and loves her job, loves the freedom it gives her to initiate exciting projects and make a difference to people's lives.

HAD has merged with two organisations both of which approached Angela and asked her to take them over. HAD currently has 36 staff.

The first organisation to approach Angela was Community Link Up, which had existed for around 40 years supporting people with learning disabilities. Its funding had been precarious for years and they realised that they could no longer just hope that funding would materialise. The CEO approached Angela in February 2011 with a deadline that the merger had to happen by the end of March the same year. Angela agrees that this is the worst way in which to carry out a robust merger process, there was too much pressure and not enough time to plan or work things through properly. It is a measure of the woman and a credit to HAD that they took it on.

In addition the Board of Harrow Healthy Living Centre (which was also experiencing financial problems) approached Angela in November 2010 with a view to merger with HAD. The centre offered opportunities for all, including disabled people, to participate fully in the community. It was highly valued by local people and by the council.



Photo: Harrow Association of Disabled people ©

There were huge issues for HAD with taking on the Healthy Living Centre mainly because it came with a service charge arrears liability. Angela and the Healthy Living Centre's trustees successfully negotiated with the council, which wrote off the £60,000 debt. HAD finally took the Centre over on 1st March 2011 so, for at least a month, Angela was negotiating both mergers at the same time. The second merger (with the Healthy Living Centre) therefore happened over five months, the first (with Community Link Up) in a matter of weeks. In comparison then with the previous two case studies they happened over much shorter time periods.

Angela re-structured and HAD made a commitment to keep the ethos and the names of the organisations with which it had merged and both are now departments of HAD.

Service users were consulted about the merger to ensure there was little change to the services they valued. There have been operational changes though and systems have been tightened up. For example, at the Red Brick Café (which was the Harrow Healthy Living Centre) there is better impact measurement of the benefits to trainees of placements. This in turn demonstrates how people are spending their personal budgets. So HAD is building up more of an impact evidence base.

As with all mergers there has been huge investment of time, resource and energy and many challenges such as the huge amount of financial and legal work that needed to be done. Angela called in favours and now realises the benefits of her previous networking, having asked a contact in the council she had once supported to help her with the TUPE negotiations⁵⁷. They later also harmonised the staff's terms and conditions across the organisation.

⁵⁷ see previous footnote on TUPE for definition

During the due diligence process there were 14 different bank accounts to reconcile in addition to three lots of accounts to produce. There were some gaps in knowledge. For example, Angela didn't know that when you close a company the bank account and assets are frozen and so it has been a long process to get the Red Brick Cafe's money back from the Treasury following the closure of its bank account. There was considerable work in negotiating leases and how Big Lottery commitments would continue to be delivered. There was slightly less complexity with the Healthy Living Centre's funders but with Community Link Up, Angela had to contact each funder to renegotiate contracts and there were a lot of very small pieces of funding.

However, merging the staff and the organisations had been relatively easy compared to the challenges presented by integrating the cultures of three different organisations. The staff at the Healthy Living Centre (Red Brick) found it much easier to adapt to change because they had more time to digest the decision to merge but for Community Link Up staff it was much harder. The merger was sprung on them with no consultation. They were told after the CEO had approached Angela and some staff found it very difficult. There was no time for them to adjust and the first time they met Angela they felt there was a conflict situation of takeover. However, Angela insists she is not sorry HAD took on the responsibility of trying to maintain services for the users of these other organisations. In the end the services were retained and all the staff, who wanted to, kept their jobs.

As in all mergers there were people (such as founder members) who still felt connected to their respective organisation who could have been better considered. In this case it wasn't possible for HAD to consult with founder members of the other organisations, as they didn't know about them until the merger had happened. As a result these founder members found merger particularly upsetting and it has taken time to rebuild relationships with them within the new organisation.

Benefits of the mergers

1. The mergers ensured that services that were valued by users provided by two organisations, that otherwise would have closed, were retained.
2. More partnership working and other opportunities have been identified, such as a new planned service with Age UK and Harrow Community Transport providing day centre activities and lunch following council cuts to older people's services. The Red Brick Cafe is also used as a perfect venue for other events such as a regular night club: open to people with learning disabilities and their friends, the night club is a safe place, with usually about 80 people attending and recently as many as 115.
3. HAD is now much more sustainable because it is larger, delivers more services and can see more possibilities for expansion of service

provision. It is, therefore, able to offer so much more to service users and because it has the space and the expertise drawn from three organisations it can be more experimental and consider accepting more risks that it would have been too small to accept before.

4. The Red Brick Café (formally Harrow Healthy Living Centre) has gone from strength to strength and is now making a surplus. The café, staffed and run by people with learning disabilities, offers affordable and healthy meals and snacks to the public. It offers trainees both on-site work experience and training towards certification in basic food hygiene, within a supported commercial environment. This prepares trainees for further employment and full integration into the workforce. Without the merger, this valuable service that improves so many people's lives would have been lost.

Lessons

1. Allow time to do things properly. Even though the second merger described happened over a longer time period there was still too much pressure, and time constraints, to get everything done.
2. Never attempt to carry out a merger process in six weeks because it is too stressful and there is the potential to miss things.
3. Try to assess the extent of the impact on existing stakeholders, including those who have historical links to the organisations being merged.
4. Consult properly with staff and involve all the right people, especially clients and people who have emotional connections to the organisation. Use the staff, Board and organisational contacts to assess and identify everyone who needs to be involved in decision-making or consultation.
5. Prepare a clear statement for funders and carry out funding negotiations in advance.
6. Focus more on preparatory work, to ensure everything is ready to go when the merger becomes a formal reality.
7. If you have to close a company as part of the merger close all bank accounts first, but ensure you have considered how any assets will be transferred in a timely fashion to the resulting merged organisation.
8. During the financial due diligence process be sure about the number of accounts each organisation holds and reconcile every penny.
9. List ALL assets (even down to knowing how many knives and forks are in the cafe).
10. Never underestimate the time to do these things and to do the paperwork e.g. archiving three organisations' records and shredding any confidential paperwork.

11. Enlist help and call in favours: expertise and support can significantly improve the process, and can be provided for free if you have previously developed close working relationships.

A final piece of advice from Angela, during the due diligence process was to look through everything with a fine toothcomb to see if there is anything that might have been overlooked but which could turn into a subsequent financial liability e.g. photocopier leases, carpet cleaning contracts etc.

A failed merger

This case study examines a merger that failed. The parties involved wish to remain anonymous so that continuing working relationships are not challenged. The case study is slightly different from the others in format, with less detail about the process and no information about the individuals concerned.

The three organisations that came together to merge were all providing specialist services, recognised commonalities in their work and wanted to develop a more holistic model that met the needs of the communities they served in a more co-ordinated way. They hoped that by joining together they would be bigger, stronger and more than the sum of their parts. They had growth aspirations and wanted to provide more services, whilst saving money, for example through sharing back office functions.

The model they wanted to adopt was a merger of the three organisations into one, with a new identity.

The organisations set up weekly meetings of the three CEOs, fortnightly working group meetings involving all three boards and away days for staff and board members. They also benefited from external consultant support to help direct a clear strategic plan which was supported by all staff.

Lessons:

The following is a list of some clear lessons about this particular process and provide indications as to why it failed. The implication is that if some of the lessons were addressed or had not arisen; this merger might have succeeded with additional benefits for the organisations' service users.

1. Do not avoid difficult issues such as the structure, governance and leadership of the new organisation: confront and address them early on in the process. This may involve challenging yourselves and each of the organisations you are working with, in a constructive way to carefully consider issues and come to an agreement.
2. Ensure that all organisations involved are able to be honest with each other, and themselves, about bottom line issues. As discussed in previous case studies, this may be best facilitated by an independent, who is not employed directly by any of the individual organisations.
3. Communicate effectively and insist on openness and honesty from all parties.
4. Make sure the Boards are brought in early on, convinced that merger is the best way forward and believe that it will work – ensure that all Board members are open and honest about their attitude towards the merger and their minimum demands. Also be aware of the way in which Boards function. If there are problems within one Board and you retain these members, the problems will be transferred to the merger process and any developing new Board.
5. Discuss control, legacy organisations and organisational culture at an early stage.
6. Each organisation in this case study carried out a valuable staff cultural analysis which helped prepare everyone for the changes ahead, but this should also have considered Board management issues, which proved a future issue of contention.
7. Don't try to do too much of the merger process yourselves. As has been shown in other case studies, enlisting help and calling in favours makes the process easier, and can provide specialist expertise.
8. Don't underestimate the time, energy and financial cost that the merger process takes – try to get *pro-bono* support to save costs. This merger process used the *pro-bono* legal service at Law Works⁵⁸. The service did legal due diligence for all three organisations and it would have drafted the new Memorandum and Articles of Association and Charity Commission registration had the merger gone through.
9. Don't underestimate the amount of good will from all sides that you will need to rely on to take things forward. Funders can be very supportive and may offer suggestions to assist with the process.

⁵⁸ www.lawworks.org.uk Another pro-bono legal service at <http://www.barprobono.org.uk/>

10. Prioritise financial and legal due diligence by all parties and remember it will require a lot of time and resources.
11. Don't set arbitrary deadlines as these will inevitably slip. Communicate clearly when things should happen, but with a degree of flexibility in order to cater for any unplanned delays.
12. Involve staff in the process from an early stage. Communicate effectively and consult genuinely with staff to ensure that they have ownership of the merger and different organisational cultures can be integrated effectively.
13. If for example there are more than two organisations in the process, think about choosing one person from amongst the CEOs to lead the process, rather than selecting multiple leaders.
14. Even if before you start you have good relations, work together, communicate well, are open, honest and friendly and have built a relationship based on trust, this process will test all of that: it will be hard, for example, to choose one CEO from three.

Think through at an early stage in the process:

1. The staffing structure for the new organisation.
2. Financial and budget decisions i.e. the financial model for the new organisation – pin it down early on (with budgets) and ensure that the new organisation will be financially viable.
3. What services will the new organisation deliver?
4. What will the vision and mission for the new organisation be?
5. Use an independent facilitator to lead you through the process so that you do not, and are seen not to, favour one organisation over another.

When a merger does not succeed, it is important to communicate the decision in a way that does not damage the collaborative relationship that has been built up between the organisations involved. Plans should be put in place to support staff and boards through a failed merger, just as you would with a successful merger. Recognise that staff, boards and other stakeholders have invested time and energy in the exercise and will need to be supported through the loss.

Part 2: Group Structures

Carnival Village: a group structure



Photo: Ebony Steel Band ©

Background

The four organisations in this case study which formed Carnival Village have all been around for a long time:

- Mangrove Community Association and Steel Band - a steel and carnival band
- Association of British Calypsonians - a member driven collective that represents the music of Calypso in Britain and in Europe
- Yaa Asantewaa - London's leading and longest established Black community arts centre
- Ebony Steel Band – amongst its work are school workshops; workshops for disabled and unemployed young people and training for young people

‘Carnival’ is not just about the August bank holiday in Notting Hill: it is about poetry, music, dance, costumes and steel bands and there are many skills required for all of these. “Industries have been built around costume making and playing pan”, Steve Roberts (who was Director of Yaa Asantewaa from 1986 - 1989) says. Young people can learn a multitude of other skills (such as team work, organisation, meeting deadlines etc) through being in steel bands and associated involvement with arts and ‘Carnival’.

Yaa was based in an old taxi meter factory in North Paddington, which was a Labour ward with a diverse community from the Harrow Road and nearby challenging areas like the Church Street and Mozart estates. Yaa was the new incarnation of the Factory, a centre run by the Maryland Community

Association, and it was written in the deeds that it should remain a community space. The building was used as a platform for Black arts projects in the 1980s and the Black Theatre Co-op was also based there. At the time, organisations began to think about working together there had also been some issues in the centre with drugs and community policing.

Yaa was a founding partner of the Paddington Development Trust which got a Single Regeneration Budget grant to develop the neighbourhood during the extensive development at Paddington Basin. Yaa was awarded Lottery arts money to refurbish the space in the old Factory centre. Meanwhile, the Ebony Steel Band which previously had a space under the Westway in North Kensington, got evicted and was looking for a new home.

Decision to come together and process

All four organisations were successful specialists in their field but had never been able to attract significant and sustained funding as individual organisations. A prime driver for coming together was to raise money in order to be more sustainable and benefit service users whilst preserving a long history of working on Black community arts. Another key motive for coming together was to find secure space in which to rehearse, hold classes and provide a secure base for them.

The four organisations chose the group structure model which established a new organisation, Carnival Village. This was done in order to preserve the identities and companies of the four specialist organisations, and avoid reducing trust in their grassroots community engagement work. Initially, Yaa had thought it would be the lead partner but the group structure model enabled them to create a new entity and develop a more equal partnership. The interest in the buildings is vested in Carnival Village as a whole. However, one disadvantage is that there are five different boards engaged in the project.

The four organisations started talking about partnership in earnest during 2002 when:

- Yaa was in North Paddington with some money and a space
- Ebony was looking for somewhere to go
- Mangrove was almost decimated
- British Calypsonians had always been based at Yaa (an objective of Yaa's is to 'hatch' other organisations)

Yaa and Ebony first discussed looking for a space and found The Tabernacle in Powis Square, round the corner from All Saints Road. As Carnival Village they negotiated a long lease with Kensington and Chelsea Council at the Tabernacle and were able to attract additional money to refurbish both the Tabernacle and Yaa's existing space. Now there were two decent buildings run by Carnival Village. Yaa and Ebony continued to be based at Yaa in

North Paddington whilst Mangrove and the British Calypsonians situated themselves at the Tabernacle.

Benefits of coming together

1. The four community organisations are now more stable and all have space – they have a base that includes offices as well as rehearsal and performance space.
2. Increased ability to raise income – both Yaa and the Tabernacle have performance spaces that can be hired out.
3. The organisations share back office functions and therefore save money.
4. Service users continue to receive services, previously at risk.
5. From a community perspective these organisations are not competing so much but collaborating. However, this doesn't extend as far as steel band competitions at Carnival where rivalry is as strong as ever!
6. An additional benefit is that there are closer ties between North Paddington and North Kensington – closer ties across borough boundaries ensuring better cohesion of services and communities.
7. Carnival Village now consists of a large, passionate group of individuals with strong characters. The long history of community personalities drives them forward but retains their grass roots identity.

Lessons

1. This is collaboration between relatively equal BAME organisations – that helps!
2. Yaa had wanted to be the lead partner and the principles initially agreed would have allowed for that, but in the end it was decided not to have a lead organisation. All partners' roles were recognised and valued equally, which in the case of four relatively equal organisations proved to be the best solution.
3. Keep on top of the partnership. Organisations need to be aware of the potential and real weaknesses in the partnership, ensuring that all can contribute and are doing what they are meant to be doing, whilst receiving support throughout.
4. If all partners are strong then the partnership is strong, so ensuring that all partners receive equal support.
5. Economies of scale have been achieved through sharing back office functions.

Age UK East London, Uniting Direction by Common Trusteeship: a group structure



Photo: Age UK Kensington and Chelsea and Sixty Plus ©

Background

Age UK East London is not a full merger: it follows the model of a Uniting Direction by Common Trusteeship and consists of Age UKs Hackney, Newham and Tower Hamlets.

The model is a group structure and whilst not a legal merger, operationally it acts to produce many benefits of the merger. Age UK East London is the holding charity and consists of three linked charities with a linked charity number. Each of the constituent charities retains its own charity number and the Board of Age UK East London (the Uniting Direction) is a Board of all the three linked Age UKs in the structure. However the Memorandum and Articles of Association have not been altered for each of the Age UKs involved.

Debbie Walker, who had been CEO of Age UK Tower Hamlets since 2003, is now the CEO of Age UK East London and was appointed in May 2011. Age UK East London now employs 83 staff on split sites.

The belief, that has become accepted wisdom in the sector, is that Age UKs are best modelled as independent local charities in order to best serve their local beneficiaries. Therefore, an initial risk of coming together, as in this model of working, might have been the considerable difficulties posed for organisations accustomed to working to this local ethos.

The three Age UKs had a history of joint working e.g. Age UK Tower Hamlets had employed a Somali advice worker to work across Tower Hamlets and Newham. Unsurprisingly Somalis, like many other people, move across borough boundaries and so this method of working allowed much better

continuity of service provision for users. There was also a history of sharing volunteers across Tower Hamlets and Newham and even a joint finance manager between the two boroughs.

Decision to come together and proceed

By 2010 it became clear to the three Age UKs in Hackney, Newham and Tower Hamlets that a single organisation in each of their boroughs was (financially) unsustainable.

They employed Charity Business to carry out a feasibility study and present options for what should be done. Charity Business recommended the Uniting Direction by Common Trusteeship model which was presented to their Boards in April 2010, where the decision was taken to develop this model further.

The focus throughout the process was on the best outcomes for beneficiaries. This was continually emphasised throughout the process by Charity Business and reinforced by the CEOs and the Boards of each Age UK.

The decision to unite was taken partly based on financial considerations. The incomes of the three Age UKs differed considerably⁵⁹ and, whilst it might have been possible for one or more to continue alone, the decision to come together was made for the benefit of service users and sustainability of the organisations. The overheads for the three organisations were enormous i.e. three CEOs, three finance managers, three sets of insurance, three advice Quality Marks etc. and whilst it was not a merger undertaken in a crisis, it might have become so had the decision to proceed not been taken sufficiently early.

Process:

1. A steering group was established with representatives from all three charities
2. Three people from each of the three boards became trustees of Age UK East London – each had expertise in the issues affecting the area they came from e.g. specific knowledge of Hackney
3. The steering group became the Board of Age UK East London
4. The charities were linked through the Uniting Direction by Common Trusteeship model
5. Debbie Walker, the new CEO of Age UK East London, has now set up a new management structure that is less ‘top heavy’ and the entire organisation has a budget of £1.9 million and a revamped mission, which better reflects the needs of its service users

⁵⁹ Tower Hamlets income was £1m; Newham £750k and Hackney £450k

The process was easier than some of the mergers mentioned in previous case studies because they didn't have to renegotiate contracts with funders and others: all contracts remained with individual charities.

Debbie says that "it took a while for people to get their heads around the shift from their local Age UK to a regional Age UK East London model. Everyone had an emotional attachment to the area they had come from." They overcame this by listening to what staff were saying and managing change well. She continues "Age UK East London may not stay with this model forever but it is working for now!"

Benefits of this model:

1. The assets and liabilities are retained at a local level so they don't impact on the group and local contracts don't need to be re-negotiated.
2. The group can pick which entity is best placed to bid for contracts and grants, either at a local or three-borough level.
3. They can better bid for contracts as a partnership across all three boroughs, as they are already working closely together.
4. The three Age UKs as Age UK East London are now working from a position of strength. They are stronger together and not scrabbling around for money or competing with each other.

Benefits for service users:

1. Age UK East London can provide better services because they know more together than separately – staff have learnt from each other and have different areas of expertise.
2. Staff share their local expertise across the region.

Debbie emphasises that "service users shouldn't really notice a change. They still access the services they want where they want them or where they've been accustomed to accessing them. Service users are only interested in an organisation's operational matters when they impact upon them, for example, when prices for lunch go up because we are paying for too many overheads. We saved £3,000 on insurance – we are saving money on things that don't concern service users like back office functions."

Debbie reiterates that this is all about developing the best services for older people and spending public money in the most appropriate way too. Ideally she is also looking to be less reliant on public sector funding and generating more income.

East London has a very diverse community and many people use local specialist services that they trust and have been developed to most appropriately meet the needs of that area. Age UK East London provides a

personal service that is tailored to people's differing needs across the region. Debbie says that "we can't necessarily meet all needs individually, so we must work in partnership. If we deliver a service, great, if someone else does it that's fine. This is not about taking over or doing everything, we need to communicate effectively so that there is no overlap."

Lessons

1. Don't retain more than one CEO to manage the change. This process kept all three for seven months. This was costly and made it more difficult for the three organisations to integrate.
2. Strong leadership is required to drive through any merger.
3. Change management is a difficult process e.g. three charities had three organisational cultures and bringing that together to create a shared culture was hard, not just for staff, but Boards too. In this case, Debbie was very skilled and experienced at change management and so was able to lead the process effectively.
4. In order to make a new beginning it might be a good idea to appoint a new chair. In this case all three chairs agreed this was required. It might also be useful to review Board membership and conduct a skills analysis. This will ensure you have the best people taking the process forward and changing the dynamics to result in better partnership working.
5. It is important to have good communication with those involved, being open, honest and allowing them to understand and own the process.
6. The consistency of communication with staff is important, to guarantee clarity and comprehension behind actions.

Finsbury Park Homeless Families Project: Subsidiary Agreement

Background

Sirtaj Rahman set up Finsbury Park Homeless Families Project (FPHFP) 28 years ago in St John's Church, Finsbury Park. FPHFP works to provide support and improve the quality of life for homeless families living in temporary accommodation in London.

Sirtaj states she wants to ensure the organisation becomes more sustainable because there have been so many successes for families over



Photo: leadercorps20102011 ©

the years, knows that the work is effective and that beneficiaries value the services provided. If she had not done something to protect the organisations' future, FPHFP would probably have closed, with service users deprived of the support they needed. For Sirtaj there is also the issue of her own legacy: she doesn't want to leave the organisation in an uncertain and vulnerable place and is committed to ensure the sustainability of their work.

"The funding situation is too difficult at the moment. There has been a lack of stability for us over a long period of time. We set up projects, they are effective, the money runs out and we have to close services," Sirtaj says.

Decision

FPHFP took out a subsidiary agreement in May 2012 with Newlon Housing Association and Outward (an organisation offering support to people with learning disabilities). FPHFP didn't want to lose its identity, brand, reputation or client group and the subsidiary agreement meant that the three organisations could retain their independence with three charity numbers and three company numbers. The agreement also allowed for one Board with small sub-committees.

Benefits

The way Sirtaj describes the change is "holding the hand of the larger organisation rather than die". "It is heartbreaking" she says "to close services and make people redundant, if I can prevent that happening I will".

The benefit of this model preserves the identity of the organisation, and their positive work with their community can continue. The fundraiser that the organisation had recently employed could also be retained, which provides future opportunities in maintaining and expanding services for their users. In addition, FPHFP gets support from its new partners and the new Board has a broader range of experience and ideas.

When LVSC interviewed Sirtaj, the agreement with both Newlon Housing Association and Outward had very recently been signed and the benefits seemed limited, as there had been insufficient time to assess the implications. However, the key driver for this agreement was to keep the organisation going, in order to continue to provide valuable services that its users would not receive elsewhere. For FPHFP, merging with the larger organisations they were working with was obviously a step too far, whilst this model initially seemed more benign.

Part 3: Partnerships and collaboration

The remainder of the case studies in this report are of models of collaborative and partnership working.

The first is of a small equalities organisation working with a large national charity; the next looks at secondment with two organisations sharing a policy officer; the rest look at collaboration, inter-agency working, a one-stop-shop women's centre, a coalition and a consortium. The report presents a case study of two networks before the final case study, 'If your ideal partner doesn't exist, is going it alone the answer?'



Photo: UK Parliament ©

Nia and Children's Society: Partnership work

Background

This type of partnership is particularly interesting because it is between a very large national organisation and a much smaller equalities-focussed one. This arrangement is one that many groups have suggested can prove problematic because of a tendency for the larger organisation to 'take over' the smaller one.

Nia is a small women's organisation working to prevent violence against women and children and to protect women and children who have experienced gender-based violence.

The Children's Society is a national Christian children's charity which wants to create a society “where children and young people are valued, respected and happy”.

Karen Ingala-Smith (nia's Chief Executive) says that “the women's sector has a long history of partnership working to protect women”. When asked why she wanted to work collaboratively, Karen answered that she wanted “to end violence against women, we can't do it alone, it helps to use allies.”

Partnership work has been crucial to the success of nia. Behind its central mission to end violence against women is the belief that working together with other agencies and sharing skills, services, and experience, a difference can be made more easily.

Nia believes that men and boys have a part to play in tackling gender-based violence, which evidence suggests results from gender inequality, stereotypical gender roles and women's oppression. They believe that educating boys as well as girls is essential to tackling violence against women and girls. So working in partnership with organisations, such as the Children's Society who engage with men and boys, is a good way for nia to help achieve its mission.

Nia is proactive about partnership working and strives to build relationships with different services and organisations. This allows them to improve signposting, referral pathways for the women and children they work with and develop new services.

Currently there is no service level agreement or partnership agreement between nia and the Children's Society; both partners are working on trust established through a five year history of collaboration on sexual exploitation projects.

Benefits for nia working with the Children's Society include:

1. The combination of the organisations' employees' different experiences that improves support to users.
2. Improved geographical connections e.g. the Children's Society is more active in south London whilst nia is more active in north-east London.
3. Cross-fertilisation of knowledge, expertise and the ability to attract a greater range of users through the difference in the scale and focus of the organisations. The Children's Society is bigger, more stable and national whilst nia is little, specialist and edgy.
4. Nia works from a feminist perspective, which is not so emphasised by the Children's Society and this difference is overt in the partnership relationship. Nia also hopes to influence the Children's Society's work on other equalities issues.
5. Nia benefits from using some of the larger partner's resources such as their media, communications, press and legal team.

Karen says that the most important aspect of partnership working is to be genuinely user-focussed to ensure the development of the best services for users. As important, is to be accountable, to retain your integrity, to trust and be trusted and to do what you say you'll do, to be committed and optimistic.

On the whole the partnership works well for nia but there are some issues that affect the working relationship. For example, because of its size and bureaucracy the Children's Society takes time to make decisions, whilst nia is 'fleet of foot' and can make decisions quickly. This can be a source of frustration for nia, with what can often seem like the Children's Society's risk-averse nature. However, in the future, if a particularly complicated issue arises, nia may benefit from the additional expertise on HR and other costly specialist issues that the Children's Society could offer to their organisation. As with many of the other case studies discussed, there are benefits and frustrations involved in these ways of working.

Karen's tips for good partnership working are to:

1. Be careful who you chose as a partner. Work with people you know and trust or people who are recommended to you
2. Respect each other's expertise and don't infringe on each other's areas of specialism
3. Support each other when things go wrong to ensure continuity of services
4. Work with a genuine sense of co-operation
5. Be assertive when you need to be



Advice UK and Action for Advocacy: Head of Policy Secondment

Background

Phil Jew is seconded from Advice UK for two days a week to Action for Advocacy (A4A). The secondment began in 2010 for two years. Funded by the Baring Foundation, this secondment (a shared Head of Policy post) was neither a thoroughly planned arrangement nor a strategic decision. It happened more by chance and the right person being in the right place at the right time!

The Baring Foundation had previously funded both organisations and when A4A applied for funding for a Head of Policy they offered half the money. This meant that A4A had to make a decision about whether to create a part-time post or to do something more radical.

The two organisations knew each other, had done some joint work and identified some commonalities between them. Both realised that there might be benefit and learning for both parties and the advice and advocacy sectors in working more closely together.

The idea of sharing the Head of Policy was mooted and practicalities discussed. The idea of a secondment from Advice UK to A4A seemed the most attractive proposal, which for Advice UK held the added bonus in cash-strapped times of off-setting salary costs for a period.

Phil says that a real benefit of the shared post is that he has learned more about the advocacy world, which like many sectors is a complex one. There are sometimes tensions between the advice and advocacy sectors that this shared role has identified and found useful to explore further. There are also areas where advice and advocacy cross over, link and are ripe for further exploration and future partnership working. There is potential for the two organisations to share other services, areas of work and functions that have been discovered through this initiative.

Advice generally focuses on social welfare and social welfare law e.g. benefits, debt, immigration and housing, whilst advocacy tends to focus on choice and control issues in health and social care. Phil says he has learnt that: “advocacy purists will say that there is no advice in advocacy, and there are many reasons why advice is totally different from advocacy, but if people are advocating on behalf of someone they need to know about legal rights.”

A key area of Advice UK’s work is based on the Vanguard Method, Systems Thinking approach and there is scope, according to Phil, for further exploration of how advocacy and advice can work together using this approach as a basis. The key thing is to adopt a user-focussed approach to service development: delivering and designing services that improve people’s lives.



Photo: LVSC ©

Applying this learning from the advice sector, and translating it to the advocacy sector, is potentially a very positive outcome of this collaboration and provides scope for further work.

Phil says that as a result of this collaboration “we’ve begun to see advice and advocacy in a different way, as access to a range of services, not just helping people to solve problems, but also improve their lives”: “It may no longer be sufficient for the advocacy sector to promote advocacy in the way

that it has up to now. We need to adopt other approaches, partly because the Government is not yet convinced about the cost effectiveness of advocacy, but also partly because it shouldn't be about protecting services and organisations, about having a right to funding, but about what is best for service users."

Advice UK⁶⁰ found that better collaboration between advice and statutory services reduced preventable demand for advice by addressing the failures in the system and helped to improve public services. This secondment allowed A4A and Advice UK to consider how such partnerships could be extended further to include the advocacy sector and so improve services.

Phil says: "You need to understand why collaboration might be a good thing and to do that you need to gain thorough knowledge of how the system works. What matters to the people in the system? Dealing with preventable failures means cutting out waste and reducing cost. If we re-design things we could deliver a better service and measure performance against what really matters to people."

Through this secondment Phil is trying to bring this systems thinking methodology to the advocacy sector.

In practice Phil says that he is doing one-and-a-half jobs, as well as balancing competing interests. He finds it challenging keeping on top of the work and the demands of the two roles, as well as just remembering where he is with particular pieces of work for either organisation.

Being Head of Policy has meant that Phil also became involved in the management of the organisations, which has sometimes felt to him as though he has no real authority (in the organisation to which he's been seconded) but lots of responsibility. He felt that perhaps a better drawn up job description might have helped resolve this issue. However he's had really positive feedback from A4A staff during the secondment so far.

The biggest challenge has been the potential conflict of interest between A4A and Advice UK. As Head of Policy, Phil is not only thinking about policy but also about managerial issues such as fundraising and business development. He felt problems might still arise where the two organisations compete for the same pot of money. It might be equally problematic if each organisation expected Phil to argue for either advice or advocacy as a priority in a policy response.

Phil thinks that there is the potential to work on a case management system for the advocacy sector, as they do in the advice sector, but again that raises another potential conflict of interest when the system he thinks

⁶⁰ Advice UK, BOLD, 'Radically Re-thinking Advice Services in Nottingham: interim Report of the Nottingham Systems Thinking Pilot', 2009
<http://www.adviceuk.org.uk/projects-and-resources/projects/bold>

might be appropriate is the one that Advice UK offers. A4A staff may see this decision as biased in favour of his original employer.

Phil's solution is to pay constant attention to potential conflicts of interest and be honest with both his bosses in each of the organisations. As an aside, Phil says that having two bosses might potentially have been a problem but in the end hasn't been. He is positive about the experience and there is potential for this successful secondment to continue.

Solace Women's Aid: inter-agency working

"When women access a women-only domestic violence (DV) service they rarely present with the sole issue of experiencing domestic violence, and often have multiple needs. They might need a mental health service, a homelessness service, sexual violence counselling or help with substance or alcohol misuse", says Sim Mandair, Senior Drugs and Alcohol and Domestic Violence Worker at Solace Women's Aid.

"Often when women try to access drugs and alcohol services they face barriers such as the male-focussed service provision or they go with partners who may try to prevent them from talking freely about violence or drugs issues". These are issues that generalist services often fail to address adequately or provide support to overcome.

In order to provide a solution to these issues Solace has been working in partnership with AVA Project to employ a specialist drugs and alcohol worker in a refuge.

Benefits of this model:

1. A refuge is a women-only space, where women find safety away from violence and abuse and receive support from key-workers in addressing the repercussions of their situation.
2. Inter-agency working means more joined-up services and;
3. Access to specialist advice and support in dealing with drugs and alcohol misuse, provided in a women-only setting.

For some service users more generalist inter-agency working may be an answer, but this model finds considerable advantages to providing a specialist women-only one-stop-shop, which are more appropriate for the needs of their service users.

Eaves, Scarlet Centre: a women's centre

“A 'one stop shop' that is a women-only safe space is important both for women feeling able to access the service and for their feeling of safety and support when they are there”, says Heather Harvey, Research and Development Manager at Eaves.

Having to go from one place to another re-telling stories and making appointments is often difficult for women with limited financial resources or time, women with children, women with lives tightly controlled by their partners or chaotic lives. There is a much greater likelihood that they may miss appointments or not access the full range of support services they need, as a result of these problems.

The range of services provided at the Scarlet Centre includes:

- Counselling
- Group work
- Body therapy
- Personal development classes (such as budgets, resettlement, independent living, relationship advice, CV skills, interview skills, computer skills)
- Specialist mental health and substance use services
- Support to exit prostitution
- Sexual violence and domestic violence services

Service users have a combination of needs across all these areas, so having it all under one roof is highly beneficial to the women; leading to better outcomes, less duplication and 'efficiency savings'.

However, it is easier for a larger organisation or a very well-funded organisation to be able to deliver in this way. It is therefore vital that such services have excellent referrals and signposting to other more niche or specialist, often smaller, organisations to ensure users receive the most appropriate services for them.

One danger of such a model, however, is that the more you try to deliver everything for everyone through one service, the more you may be assumed to be a generic service. This could result in being overloaded with calls and requests that could skew your service from the specialist Violence against Women and Girls (VAWG) services that your organisation is an expert in providing.

Some of the challenges the women's sector also faces relate to providing a women-only safe space, which can cause funders to accuse them of sexism by not involving men. In addition, cases have been cited of feminist

principles being alienating to funders. There is increasing pressure from funders to provide to both men and women as budgets tighten, so it can be a logistical difficulty that organisations have to be prepared to stand by, confront and maintain.

Paradoxically, there is also the danger that organisations and services become segregated from multi-sectoral discrimination, e.g. disabled women experiencing violence may not be signposted to the appropriate disability services in a service that solely concentrates on gender. There is obviously a careful balance that organisations need to maintain to best meet the needs of their service users. Partnership and collaborative working is part of better addressing multiple pan-equalities needs, but specialist equalities services should not be lost as a result.

End Violence against Women coalition

The End Violence against Women (EVAW) came together as a coalition (of currently 52 members) in 2005 to campaign for more strategic and integrated approaches to combat all forms of violence against women and girls (VAWG) around the UK. It grew out of the (now closed) Women's National Commission. The coalition is currently campaigning on the need to prevent violence, rather than deal with the consequences.

Amnesty International UK hosted EVAW initially as part of their global Stop Violence against Women (SVAW) campaign. Following the end of that campaign in 2009, EVAW members agreed to set the coalition up as an independent organisation because they felt that it was important to continue the campaigning work. EVAW was registered as a company limited by guarantee in 2010 and will be registering as a charity. It is currently funded primarily by Comic Relief and Trust for London.



Photo: Garry Knight ©

Members contribute to the running of EVAW in a variety of ways, from the provision of desk space (Amnesty) to helping with specialist expertise and, developing joint campaigning and a unified voice involving a broad range of stakeholders.

There are two policy advisory groups of experts; one dealing with prevention and the other more general. These provide an accountability mechanism to members. EVAW develops policy and campaigning in consultation with members, in order to speak with a unified voice on key issues and shift

debate. In this way it has secured new and improved VAWG strategies in Westminster, London, Wales and other local areas.

Benefits of this way of working:

1. Sharing of expertise improves results for women and strengthens their voice.
2. Discussing and sharing information about strategy amongst members improves practice and the coalition's impact.
3. Bringing together a wide range of diverse groups such as Amnesty and the Trades Union Congress, with small women's organisations and frontline service providers, means they can better learn from each other. There is also a greater understanding, and support for a broader range of services.
4. EVAW can focus on VAWG in the UK and link in with Amnesty's international work, so ensuring that the two are informed by each other's work, but do not duplicate.
5. EVAW is located within a human rights organisation, thereby framing VAWG as a human rights issue, and linking it with other human rights issues. This also ensures raised awareness of VAWG amongst the human rights sector.
6. EVAW is small, nimble and independent and this set-up allows that to continue.
7. Benefits for members are that EVAW can speak with a bold and independent voice and is not constrained by being government funded, which can be a problem for individual members.
8. The diversity of experience and expertise on the Board is increased through the broad range of organisations involved.

Challenges:

1. There are 50-60 organisations in the coalition and so there are the same tensions as in any other sector/coalition, such as disagreement on policy positions, and increased time to identify consensus amongst members.
2. EVAW needs to ensure it does not duplicate members' work and does not divert funding away from frontline services. It does this by closely monitoring what members are doing and how the funding landscape affects them.
3. EVAW needs to ensure that what it is doing meets a need and fills a gap, so it regularly surveys its members' needs and meets regularly to discuss and agree on strategy and direction.
4. Resources are a problem, as with all organisations, but there is more sustainability through cost savings and partner support when working together.

Pan-London VAWG consortium (facilitated and co-ordinated by Women's Resource Centre)

The pan-London VAWG consortium provides a power-sharing model of a consortium, which currently consists of 18 women's VCS organisations working on violence against women and girls. It is founded on shared principles and values. The consortium was formed so that women's groups in London could bid into the 2013-15 London Boroughs Grants Scheme administered by London Councils. In the future it is anticipated this model will be used to bid to other funders.

"If you haven't the same underpinning approach, values, ethos and principles it causes issues later on" says Vivienne Hayes, Chief Executive of the Women's Resource Centre, who was influential in bringing the consortium together. "There are issues of power sharing and a shared approach is important for the model you choose. There isn't one model and the main thing is building and maintaining relationships".

One way in which this consortium has addressed some of these issues is to draw up and agree underpinning principles (see Appendix 2) which included:

1. Acknowledging that the capacity of small organisations to engage is limited and taking account of this within the set-up of the consortium.
2. Acknowledging this proportionality: small organisations have more difficulty giving time whilst for larger ones it might be easier, so building this into the consortium approach.
3. Finding ways of including people who cannot come to every meeting or engage on the same level as others.
4. A uniting commitment to organisations led by and for women.
5. Maintaining the value of a diversity of smaller specialist organisations, which is reflected in the consortium, so maintaining diversity of provision and greater choice for service users.

There are six sub-groups within the consortium, each with a lead partner. The lead partner acts as the accountable body and holds the consortium's money. Each sub-group will contribute to a central administrative function held by one of the second-tier organisations within the consortium, which will be responsible for keeping the consortium together. This role will also hold members of the consortium to account on the underpinning principles; make sure steering group meetings happen; and ensure best practice. The holder of the administrative function in this model, therefore, takes on some of the tasks of a lead agency but doesn't hold the money or the power. This aims to ensure greater equality and empowerment throughout members of the consortium.

Lessons from building this consortium:

1. All partnership working requires time, energy, resources and commitment.
2. The consortium is being driven by organisations in response to the changing environment. The women's organisations involved have controlled the process.
3. Integral to partnership work are honesty, integrity and accountability.
4. When working in partnership, people often make assumptions and don't check them out; this needs to be addressed early.
5. Get a facilitator in if things become difficult.

Two networks: Voluntary Sector Forum (VSF) and HEAR (the London equalities network)

Networks are a fundamental way through which VCS organisations collaborate in London. They are informal but of enormous value to members and to the sector. Hosting networks and hatching projects is something that VCS organisations do on a day-to-day basis across the capital.

Voluntary Sector Forum (VSF)



Photo: LVSC ©

Background

VSF was established in 1986 through the London Boroughs Grants Scheme. Organisations are members of the Forum because they are all funded by London Councils.

VSF is an independent, unconstituted network that is hosted by LVSC and has been managed by the researcher for six years. The work of the forum is guided by a steering group elected from the membership.

VSF is adapting to change by evolving from a being a network of organisations brought together through a common funder to having a remit that focuses more broadly on policy matters of interest across London; such as homelessness, domestic and sexual violence, poverty, inequality and capacity building support.

Organisations that have valued the network, learned from each other, shared good practice and campaigned together will (from 2013) be joined by other London VCS organisations to create a larger, stronger and multi-faceted voice.

Benefits of working in this way:

1. This is an informal way for organisations to involve themselves in collaboration, which means there are very few organisational, and no legal, commitments.
2. VSF acts as a connector by bringing groups together, so encouraging more efficient ways of working, cross-sector learning and reducing duplication.
3. Connection through membership of VSF allows members and LVSC itself to better connect to other forums like the London Advice Forum, the Law Centres network, and the Black Advice Network as well as many others.
4. VSF develops policy positions in a collaborative way, creating a stronger voice for London's VCS.
5. VSF represents the membership in a range of areas such as consultation responses and promotion of members' work, so allowing engagement of organisations that would otherwise not have the capacity or resources to be involved in these processes.
6. Organisations that are members of VSF have a commonality of interest i.e. funding from London Councils and a diverse range of aims and objectives, which means they can reflect the diversity of London's communities.
7. VSF provides opportunities to meet face- to- face and share information, good practice and learning as well as access to online resources.
8. VSF acts as a single point of contact for a wide range of organisations. It allows statutory organisations to engage with a wide variety of London-focussed VCS organisations through this single point of contact.

HEAR

Background

HEAR is a network of equalities, human rights and mainstream organisations that has been managed by the researcher at LVSC for 18 months since its funding and worker were lost. HEAR has now found a new host at Refugees in Effective and Active Partnerships, although LVSC will continue to offer support to the network until it can secure funding.

HEAR acts as a strong pan-equalities voice and source of knowledge and expertise on issues impacting on London's VCS.

LVSC has participated in the network since 2006 when it was established as a sub-group of the London Regional Consortium of Change-Up. HEAR is an essential forum through which LVSC can show solidarity with, and support for, London's equalities sectors.

As a generic organisation, LVSC benefits from participation in HEAR through:

- Sharing best practice on equalities
- Understanding the challenges that equalities groups face
- Developing and improving generic services that are accessible to and appropriate for equalities groups
- Celebrating equality and diversity

Benefits for members include:

1. Adopting a pan-equalities approach allows groups to form common bonds that focus on human rights and move away from silo-thinking.
2. Solidarity with other equalities organisations creates a stronger voice at a time when equality is low on the agenda.
3. Sharing information and best practice saves time and scarce resources, ensuring better signposting between specialist equalities groups and improving work on multiple discrimination issues.

The final case study: If your ideal partner doesn't exist, is going it alone the answer?

It may be that having looked at the range of models available, researched potential merger partners and discussed other forms of collaborative arrangement nothing quite suits your organisation. It may then be that, you could better meet the needs of beneficiaries by changing the mission of your organisation, expanding the remit, changing the name, or a combination of all three.

The final case study looks at the experience of one organisation that decided to evolve from London Irish Women's Centre to 'Mind Yourself'

Background

"Mind Yourself!" Claire Barry, Director of the organisation says after discussing the change from London Irish Women's Centre (LIWC) to the new organisation called, coincidentally, 'Mind Yourself'. The name comes from the Irish parting, which translates to 'take care of yourself' in English. "The Irish will get it (the name) and they are our target beneficiaries" she says.

Claire joined Mind Yourself in 2011 and led the transition process from LIWC, which was a radical, feminist, political organisation, formed to meet the needs of Irish women in the 1980s. However, these needs had changed. "It reached a philosophical, ideological and financial end to its natural life" Claire says.

The move from LIWC to Mind Yourself was evidence-based. "We talked to clients using the centre who felt that it was more difficult to be Irish than a woman in London these days" Claire says.

The core work for Mind Yourself focuses on reducing health inequalities in the Irish community in London. Irish health inequalities are stark with high rates of poor mental health, social isolation, suicide and long term health conditions related to alcohol misuse, smoking and former occupations.

Established in 1983, by the mid-1990s LIWC had changed from being a political organisation with some services, to being a service provider with a financial shift from grants to Service Level Agreements, contracts and commissions. Claire started in February 2011 when the organisation was experiencing difficulties. In thinking about the challenges the organisation's Trustees asked themselves "if we didn't exist would you set us up?" The answer was "no". That meant that while they recognised that Irish women continued to need support, the range of reasons for establishing the centre had decreased and there was no longer a specifically expressed need for an Irish women only centre in London. "If

there had been a rationale to keep going then we would have done it” Claire says.

LIWC had become solely an advice giver, with a reducing number of clients, located in a three storey building that they owned in Stoke Newington. “Thank God for Ken Livingston” Claire says “he’s the one who gave us the original grant to buy the building”. This building gave the organisation some security because they owned it.

LIWC lost its London Councils commission and had to make two advice workers redundant in August 2011. Following that, there were only two members of staff left in a building that needed substantial refurbishment.

There wasn’t really a community of women visiting the centre (300 in 2010 275 of whom came for advice), and no huge demand for services located in a large building which was difficult to get to. New arrivals weren’t coming because the Irish were prepared for living in London when they arrived. Many Irish people arriving in London in 2011 had already obtained jobs and were accessing non-specialist advice online.

The options LIWC discussed were to:

1. Find another organisation(s) with similar values, mission and ethos to merge/form a group structure with.
2. Find collaborative partners to work with to keep working in the short-term.
3. Renovate the building and maybe rent it out or develop flats and sell them whilst keeping office space.
4. Wind up as a service provider, sell the building, invest the money and make grants to individual women, for example, to support their education.
5. Wind up completely and divest the building to another charity.
6. Sell the building and reinvent the organisation.

Lessons:

1. Make decisions before you have no options left. Claire says that decisions should ideally have been made earlier but there was fear of change, as well as the fear of potential disloyalty to the founders who she describes as the ‘absent presence’.
2. Nurture the relationship with the Chair of trustees to ensure successful change management and manage risk-averse trustee behaviour.
3. Recognise that ending is a natural part of organisational life and needs to be managed with the same thoughtfulness as growth.

Conclusion

Claire Barry explains the decision that Mind Yourself took. “It didn’t seem that there was an appropriate organisation for Mind Yourself to merge with when options were being discussed. For example, there was no specific Irish men’s organisation [that we could partner with]. Other Irish organisations had church influence and Mind Yourself was based on being non-denominational and wanted to ensure that the traditional patriarchy of the church and Ireland did not become a feature of its work. There was one other Irish organisation [we could have worked with] but it served alcohol and Mind Yourself wanted to be an alcohol-free service”.

Under these circumstances Claire says that ‘Mind Yourself’ needed to be independent, establish its own identity and leave the past behind rather than merge into, or be a subsidiary of, another organisation. It needed to reinvent itself and to do that; it needed to do it on its own.

There had been discussions prior to Claire starting at Mind Yourself between Irish organisations about forming a consortium but they didn’t work out. There was no obvious organisation for Mind Yourself to partner with in terms of values and scale, so in order to continue to meet the needs of the people it worked with, the organisation opted to change its direction and model of work rather than merge. As with everything in these uncertain times, merger can never be ruled out and Mind Yourself is considering partnership opportunities such as joint funding bids for the future.

Keeping true to the values that underpin the organisation was the key driver for maintaining independence. LIWC was established to provide an alternative to the traditional ‘Irish offer’ in London. While a lot of the reasons for establishing the centre were no longer felt to be relevant by its users, the need for something other than existing, traditional models was still required. This was to ensure that Irish identity in its widest sense was welcomed and valued regardless of gender, sexuality, religion, settled or Traveller or, socio- economic status. This need was exacerbated by the fact that certain categories of Irish people are not very welcome in Ireland, and users’ experience that lack of welcome in some specialist Irish services in London.

There hadn’t been any negative feedback from the women’s sector about opening up services to men, as that wasn’t really what LIWC had done. They had realised that the organisation in its past form was at an end, that there was no longer the original need and that the Irish community in London needed an organisation focusing on health inequalities. This is a considered adaptation demonstrating how the VCS can respond innovatively to change.

Claire says that “LIWC probably hadn’t been a strong presence for 10 years or more relating to the political cause for which it had been established and people recognise that you need to do what you need to do as an organisation”.

As part of the change process, LIWC felt that it was really important to mark the past and celebrate the history of the organisation, its services and the Irish in London. They held a big ending event in summer 2011 when the advice service closed, sold the building in March 2012 and had another event. “We needed to end something well in order to begin something else well” Claire says.

“Mind Yourself does not want to be anybody’s Irish mammy,” Claire says “you need to look after yourself!” It is this ethos of empowering people to look after themselves, to make their own choices and decisions that comes directly from the non-patriarchal ethos of the women’s sector and much of the rest of the VCS. Perhaps the change is not so great!

5. Discussion

Talk of merger is often associated with takeover, which seems to be a dirty word in the VCS. It may be that in a climate of retrenchment and budget cuts, fear is very close to the surface. Fear of closing services, users losing services they rely on and expert staff being made redundant are all fears that were voiced during the interviews for this research. Many VCS organisations feel under attack from disproportionate cuts in funding from the public sector as well as from government policy reforms. This sense of being under attack and the desire to remain independent might explain the fear of merger, and even closer collaboration or partnership working.

This discussion will focus on the case studies themselves and draw out some of the key learning. Much of what follows is not surprising, but valuable when reinforced by so many voices from the sector.

A key message was to not underestimate the time, energy and resources needed to do things properly. You can't do collaborative work or merger in a rush. All the merger participants mentioned this in the interviews.

Angela Dias had a very brief period in which to go through the process with both organisations that merged into Harrow Association of Disabled People. She advises not to carry out this process in such a short space of time. The merger that resulted in Disability Rights UK is a journey that has not yet finished and whilst the main bulk of the work was carried out in a year, discussions began well before that. The merger of Age UK Kensington and Chelsea and Sixty Plus took 15 months. The Age UKs in East London worked closely together for several years before uniting in a group structure.

It is not just merger that takes time but collaborative working in its widest sense. All the participants who talked about partnership working talked about building trust and relationships over a long period of time. For example nia worked with the Children's Society for five years and its current sexual exploitation work is a continuation of that work. VSF has been bringing together organisations funded by London Councils for 26 years.

What benefits service users is vital to the development of discussions, plans and the implementation of collaborative working. Whatever you do and however you choose to do it, it has to benefit the service users. Sometimes there is a blurring of the boundaries between what might sustain an organisation and what benefits the service users. Without organisations there would be no services but the financial health of the organisation as a lone consideration should never be the only driver for collaboration. All the participants said that, in their minds, the service users were at the heart of their decisions and plans to merge or collaborate.

Organisational culture is an important consideration when merging but also when considering partnership work. Trust, openness, honesty and integrity were values that were referred to by most participants in this research. Organisational culture is the personality of the organisation, the shared basic assumptions or more colloquially 'the way we do things around here'. Culture refers to the underlying values, beliefs and codes of practice that make an organisation what it is. It can be seen through: behaviour, standards, values, mission, organisational rules, skills, habits and shared knowledge and meaning.

By doing an exercise that asks staff and Board to comment on how they perceive the organisation (what values they think underpin it, how things are done, what are the rules), the person leading the merger can assess the organisational culture and work out what a perfect partner might look like.

It was obvious that in most cases organisations only worked with other organisations they trusted, had worked with before or who shared similar approaches, values or ethos. They built on solid foundations based on a history of joint working. One of the reasons that Mind Yourself didn't merge with any of the other London Irish organisations was that they didn't find a partner that shared the same values or had the same approach. The pan-London VAWG consortium was established with a clear set of values and principles to underpin the work, much as in group work ground rules are often established before work begins.

Good consistent communication was cited by nearly all the participants as a vital ingredient for effective collaboration. This can be achieved through good planning so that key steps in the process of merger or collaboration are communicated at the right time. Messages need to be consistent and clear. Even if there is nothing to communicate then communicate that. By consulting with, including and understanding staff teams and Boards, the most effective ways of communicating can be identified. Both Harrow Association of Disabled People and Mind Yourself identified stakeholders (they were unaware of) who should have been consulted during the process of transition. By asking staff, Board and contacts who should be involved, some of those who may have been forgotten can come to light. Close consultation with stakeholders was a lesson that nearly all participants mentioned.

Merger, in particular, will have a psychological impact on staff. All the merger case studies talked about this, particularly Age UK Kensington and Chelsea and Disability Rights UK. It seems obvious that change management, whatever form it takes requires skill, empathy and diplomacy but all the interviewees referred to it in the conversations with the researcher. The impact of change on staff can only be understood by asking and regular meetings should be set up to involve all staff in the process of transition. Supervision meetings will also help to uncover issues that individual members of staff might have with the process and the change.

There seems to be a strong argument for the benefits of merger or collaboration; most of the participants agreed that together they were stronger, either financially or by creating a louder voice; they were more than the sum of parts. The aspiration of the failed merger was to grow and Disability Rights UK felt that they were stronger together. End Violence against Women by being a coalition has a stronger voice through its membership. This has to be balanced with the potential for loss of independence or speciality and the weakening of niche areas in the VCS. Age UKs for example are known to be expert in their local areas, so this was a challenge that Age UK East London had to overcome. Equalities specialists like nia could be threatened by working together with large national organisations.

Small equalities specialists report feeling threatened because they fear being marginalised, subsumed or overwhelmed by larger more powerful organisations. In nia's case the partnership worked well and allowed nia to be assertive when needed. Central to nia's working ethos to end violence against women is that "together we can make a difference". The answer that Karen Ingala-Smith gave to the question "why collaborate?" is both clear and unqualified "to end violence against women, we can't do it alone, it helps to use allies". Identifying allies and using them effectively in collaborative work might be one way to help reduce this threat.

The benefits of working together always need to be balanced with going it alone. It may be that you just can't find someone to partner with, someone who shares the same values, ethos or mission. Therefore, it may be morally, legally and in the best interests of your service users better to stay true to your mission rather than dilute or divert from your objectives, as the Mind Yourself case study demonstrates.

There are of course financial drivers, whether through crisis (as in Harrow Association of Disabled People in the takeover of organisations that were unable to raise sustainable levels of funding themselves) or the shift from competition to collaboration (Disability Rights UK). However financial drivers should never be the only consideration. Come together only if what you plan to do will benefit your service users. If as a secondary consideration collaboration saves money or sustains organisations, then that is a bonus.

In many cases, as participants have said, it costs a good deal of money to collaborate and especially to see a merger through. Coming together often creates economies of scale in the long run so could produce a better use of resources in the future. Age UK East London felt that it was more advantageous for all three Age UKs to unite in a common direction so as not to scrabble around for money, competing with each other. Do you want to waste time and money competing for limited resources when you could invest that energy and money in working together?

For Sirtaj Rahman at Finsbury Park Homeless Families Project the terrible financial and economic situation left her with little alternative than to take out a subsidiary agreement with larger more financially secure organisations. The heartbreak (of closing services and making staff redundant) as well as the uncertainty (for service users) had become unmanageable. Crisis is often a key driver for collaborative work and merger, but crisis doesn't allow sufficient time to do the preparatory work that many of the participants on this study carried out prior to merger or collaboration.

Another key driver is that forming a consortium or a partnership might be the most effective way to develop well-designed, joined up services and a cohesive vision to bid for funding. Both are inadvisable unless well managed, well planned, based on trust and of an overall benefit to service users. A lesson from the Mind Yourself case study, and through the stress caused by the short timescale for the HAD merger case studies, is to make decisions before you run out of options.

The case studies from Disability Rights UK, the failed merger and the WRC VAWG consortium, all used an independent facilitator to see the process through. They did this to ensure some objectivity and so that they could be challenged during the process. An important element of any process such as merger or collaboration is to ask the right questions, say the unsayable, and get the perspective from someone not involved or having a vested interest in the organisations or the resulting partnership. It can also provide the underlying reminder that everything must benefit the service users. If you have the capacity, set up working groups or steering groups to organise and drive the collaboration forward. Call in favours, as HAD did, to help with some of the legal and financial aspects of the work in the due diligence process. Most of the participants said that they enlisted help in the collaborative process and some took *pro-bono* advice.

All the interviewees were excited about the work they were undertaking or had undertaken. It seems that a lot of energy, inspiration and creativity can be catalysed by collaboration. New projects and new collaborations can be sparked by coming together.

Sometimes it just makes good sense to come together (see Carnival Village). It helps to benefit service users, create voice and ensure stability and sustainability. Sometimes the exception to the rule of always planning and thinking through collaboration is that things happen by chance, and collaboration just seems like the right thing to do in a particular circumstance (see the secondment case study from Advice UK to Action for Advocacy) and this kind of collaboration reaps unexpected rewards.

Collaboration and merger structures vary and you have to adopt the model that best suits you. As Viv Hayes says in the pan-London VAWG Consortium case study "there is no one size fits all".

There are advantages and disadvantages to each of the models depending on what sort of organisation and what sort of partnership you are looking for and crucially the situation in which you find yourself. If the merger or the collaboration is driven by crisis, there may not be sufficient time to assess the advantages and disadvantages for either side but as with due diligence, this analysis is vital. Charity Commission guidance⁶¹ lists eight of the most problematic barriers to successful merger identified by charities.

These barriers can be structural, cultural, financial, professional or political and include:

- Lack of adequate communication with stakeholders
- Personality clashes
- Culture clashes
- No stated merger objectives or evaluation mechanisms
- Integration of staff from different organisations
- Integration of IT systems
- Lack of project planning/process management
- Rushing the process or unrealistic targets for merger

All the preceding case studies tell stories of particular collaborations and contain both lessons that the participants learned from their processes and challenges they experienced. Some also give tips and pieces of advice that will help readers to decide whether a particular model might be appropriate for them.

The process of collaboration and merger requires strong leadership, a strong and pragmatic CEO combined with a strong, well informed Board (see Age UK East London) and most of the participants cited these as key factors.

Key to collaborative success in the Advice UK secondment case study was the Vanguard Method, Systems Thinking approach, which focused on the system and what matters to the service users. This suggests that if you improve the system, you improve outcomes for beneficiaries. This clearly echoes the points made in other case studies about beneficiaries being at the heart of any collaboration.

Solace's inter-agency working or Eaves women's centre might be the most appropriate collaborative approach to addressing service users' multiple needs. But these may only be possible for larger organisations. Others may find coming together as individual entities in a power-sharing consortium model, as in the pan-London VAWG consortium or in a coalition such as the

⁶¹ Charity Commission, 'Making mergers work: helping you succeed', 2009

EVAW coalition, more effective ways of delivering improved outcomes for beneficiaries.

For the final case study presented here when the perfect partner could not be found the alternative to collaboration or merger was to reinvent itself. Mind Yourself rose from the London Irish Women's Centre and the evolution came from research that identified that focussing on reducing the health inequalities experienced by Irish people in London was what was needed. To do that Mind Yourself needed to change its name, its mission and go it alone.

6. Conclusion

A collaborative approach has informed this evidence based research report. It is important for LVSC to tell the stories of these collaborations and to chronicle these histories. The words and the voices of the participants shine through. The researcher aimed to add authenticity to the work by quoting from interviews and adopting the participants' own terms and definitions.

For some in the VCS the big issue now is about survival: it is the choice between co-operation and collaboration or closure. Others feel that collaborative working is being forced on VCS organisations if they want to bid for ever larger contracts, which are their only chance of survival.

Just as none of us knows what will happen to the VCS in London once the dust settles on public sector cuts and welfare reform, it seems likely that having read through these case studies, having talked to all these passionate and committed people, having written this report - something pretty wonderful will remain.

7. Recommendations

For VCS organisations:

1. Service users come first – make sure that you are sure that everything you do has them at its heart – consider partnership or merger as a solution, in cash-strapped times, as long as it benefits service users.
2. Don't underestimate the time it takes to collaborate or merge. Build relationships and establish trust. Seek support and advice and share learning.
3. Have the courage to do what's right for your organisation.
4. Use this report and the resources at the end and contact VSF for support if you need it.

For policy makers:

1. Be sure that when you talk about partnership working as a solution you understand what it entails by asking VCS organisations about their experiences and learning the lessons from case study examples like the ones in this report.
2. Just as VCS organisations must put service users before organisations it is vital that policy makers also have beneficiaries at the forefront of policy making.
3. Try to measure the impacts of your policy decisions, especially those that seem to encourage partnership working and collaboration: are these improving services for the most disadvantaged in London at a time of significant cuts?

For funders:

1. Don't cut the funding that provides good quality support and capacity building for VCS organisations, if you wish to ensure more effective partnerships, efficiency savings and reduce duplication.
2. Recognise that collaboration, partnership working and merger take time and money to see through effectively – invest money to enable groups to work more effectively together.
3. If partnership bids are a condition of funding, allow the appropriate time for them to be developed and afford opportunities for independent support and partnership brokerage.

Appendix 1: Bibliography

Merger

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Other collaboration literature

Sharing without Merging: A Review of Collaborative Working and Sharing Back Office Support in the Voluntary and Community Sector, January 2005, commissioned by bassac

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More than the sum of our parts: key findings on co-location, (2005, 2011), Romaine Hutchison and Ben Cairns

Collaborative organisational models which enable third sector providers to access MCVs, March 2011, Stephen Jeffery

Supporting collaboration and partnerships in a changing context, May 2011, a study for the Big Lottery Fund

NCVO Collaborative Working Unit resources:

- National organisations with local groups: a model of collaborative working, November 2005
- Sharing back office services: a model of collaborative working, September 2005
- Joint working for public service delivery: a model of collaborative working, February 2006
- Merger: a model of collaborative working, March 2006

- Working together to achieve your mission: a model of collaborative working, June 2006
- Collaborative working: partnership between voluntary organisations, March 2007
- Should you collaborate: key questions
- Consortia delivery of public services
- Joint working agreements: developing agreements between voluntary or community organisations

Shared services: a means to an end (the contribution of shared services to 'place shaping' and 'community well-being'), undated, a Capita white paper for local authorities and their partners

Charity Commission checklists:

- Collaborative working
- Mergers
- Due Diligence

Appendix 2: Draft principles and values for the VAWG Consortium (August 2012)

The VAWG Consortium will move forward on the basis of the following agreed principles and values. All members of the Consortium will sign up to and abide by these principles and values.

1. Consortium members will have a feminist and anti-racist ethos and work on human rights principles.
2. The consortium members will ensure that the needs of BMER women are addressed across all service strands in line with the ethos of 'led by and for.'
3. Members will have a commitment to 'led by and for' provision (This means services governed and delivered by the communities of interest which they serve, for example: BMER services will be delivered by organisations who are governed and staffed by BMER women) and women-centred services. Where there are exceptions, this will be because members have specific and specialist services for women that are considered essential in meeting the needs of women and children affected by VAWG.
4. The Consortium may choose to work with or sub-contract services from organisations which do not meet the criteria or fully agree with the principles set out below, if they judge those services to be essential in meeting the aims of the Consortium and the needs of its beneficiaries.
5. All members will have a commitment to equality and diversity and will need to meet the minimum standards set by the Consortium.
6. The Consortium will be committed to good quality design and service provision for women, and will support each other to improve quality through sharing expertise, resources and capacity and identifying any promising practises that effectively meet the needs of women and girls affected by VAWG.
7. The Consortium and its members recognise the importance of specialist and targeted services. It will ensure that all communities of interest are represented in the Consortium, and will commit to identifying and meeting gaps in need. It will develop a proper referral pathway for targeted services. It will negotiate around the needs of targeted organisations and services and will commit to maintaining and sustaining specialist and targeted provision.
8. The Consortium will recognise the contribution and limitations of smaller organisations. It will agree minimum participation in the consortium taking into account smaller members' needs and ensure that smaller organisations are supported to participate. It will ensure that proportionality is maintained in expectations of smaller

members, and that expectations of smaller organisations are clearly set out.

9. Members will be honest and accountable to each other and to the Consortium as a whole. They will commit to challenge each other and address any issues of contention which threaten the effectiveness or progress of the Consortium and are counter to its principles and values.
10. Members agree not to bid competitively against the consortium, alone or with any other provider or partnership outside the Consortium for VAWG funding from London Councils. Members will not discuss specifics of the planning or bidding process with another provider or partnership outside the Consortium. If at any stage the Consortium agrees not to go ahead with bidding for funding for a specific strand, members may by agreement with the Consortium bid for the contract with another partnership.
11. Potential conflicts of interest that may threaten the partnership and specifically its competitive advantage in relation to London Councils funding will be declared and discussed by members.
12. All members of the consortium to demonstrate financial viability, to be registered charities or not for profit, and have appropriate governance structures in place.

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