

# Supporting Links to Commissioning A Leeds Voice Project

## A Commissioning Training Needs Analysis of the Third Sector in Leeds

Research & report  
compiled by TABRONA

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**TABRONA**  
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## **Supporting Links to Commissioning Training Needs Analysis Report**

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# FOREWORD

In recent years Central Government in England and Wales has recognised that Third Sector Organisations have a crucial role to play in the drive to improve public service delivery, and has committed itself to increasing the involvement of the Sector, recognising the reach the Sector has to local communities and the ability to work in pro-active and innovative ways that the Public Sector can struggle with. At the same time there have been drivers to ensure that greater efficiencies and Best Value is achieved. It is in this environment of potential dichotomy that formal commissioning arrangements have developed.

In this way Leeds is no different from other areas of the country. Where the differences arise and where the additional challenges are to be found, lies in the sheer size and diversity of the City. This is in terms of the aspirations and needs of local communities and groups, the organisations working with them and the numerous commissioning bodies within the Public Sector. Third Sector Organisations need to have the skills and resources to navigate the maze of who commissions?, what do they commission and how? And all this is with each of the commissioning bodies whose processes can vary widely even from department to department.

So is the Third Sector in Leeds fully equipped and 'commissioning ready'? Is the Public Sector satisfying its' promise to embrace the Third Sector as an equal partner in terms of planning service outcomes, procurement and delivery of service? It was the remit of the Training Needs Analysis to find the answers to these questions. There is a willingness from both Sectors to work together and some areas of good practice where partnership working is leading to commissioned Third Sector Organisations delivering real change in Leeds. There is however a long way to go before this is replicated fully across the city. The Supporting Links to Commissioning Project will work with Third Sector Organisations and the Public Sector over the next two years to support this process through to realisation.

Finally, who is the Third Sector? We have used the definition from the Office of The Third Sector, which states that, the Third Sector is, "a diverse, active and passionate sector. Organisations in the sector share common characteristics: non-governmental, value-driven, principally reinvest any financial surpluses to further social, environmental or cultural objectives. The term encompasses voluntary, community and faith organisations, charities, social enterprises, cooperatives and mutuals both large and small."

Rachel Nixon-Smith  
Commissioning Links Manager

Leeds Voice  
May 2009

## ACKNOWLEDGMENTS

The time offered by the involvement of the 82 Third Sector organisations who willingly contributed to the research is greatly appreciated. In light of the fact that time constraints were found to be the main barrier to Third Sector senior staff being engaged in commissioning, makes their contribution to the research all the more precious. This report is enriched by their honest 'tell it how it is' input, in terms of the lack of hours in the day they have to run their charities, organise their groups and represent their service users. Their insight into the quality of relationships they experience with commissioners, the gaps they endure in resources and skills along with their concerns about commissioning is greatly appreciated.

Stakeholders, including the Office of the Third Sector, 7 Leeds based commissioning agencies and political representatives in Leeds were involved in the research. Their time and contributions are greatly appreciated. Their commitment to the Supporting Links to Commissioning project is also gratefully welcomed.

I would like to thank Leeds Voice for administration support from Sarah Janicwicz, communications support from Briony Pete, and continued guidance, professionalism and humour from Jeanette Morris- Boam, Rachel Nixon-Smith and David Smith. Special thanks to Rachel Nixon-Smith for the feedback on the numerous re-drafts to ensure this is a functional document profiling a true snapshot of the commissioning training needs of the Third Sector in Leeds and recommendations on how to move towards tender readiness.

Bronagh Daly  
Director, Tabrona

## EXECUTIVE SUMMARY

In November 2008 Leeds Voice, assisted by Groundwork Leeds and Re'new, successfully won a contract commissioned by Leeds City Council entitled Supporting Links to Commissioning. The project aims to increase the number of Third Sector organisations in Leeds who are competent in responding to commissioning opportunities including competitive tenders whilst building strong relationships with the Third Sector, Local Authority commissioners and strategic leads.

This report outlines the key findings of a training needs analysis of the Third Sector in Leeds and provides an overview of the training needs and recommendations for training. The recommendations in this report form part of the process in breaking down the barriers that prevent the Third Sector of Leeds from participating fully in the commissioning processes and bid successfully for funding to deliver highly efficient and effective public sector contracts. Numerous barriers stand in the way of the Third Sector which the executive summary and the findings highlight. Certain themes appeared throughout the course of the research that highlighted that training activities need to be relevant to staff, board members and trustees of the diverse organisations within the Third Sector operating in Leeds. Senior staff working in specific areas such as women's services, Learning Disability and Black and Minority Ethnic support services raised concerns that they may be in danger of slipping off the commissioning agenda and face cultural barriers setting them at a greater disadvantage than most other Third Sector organisations.

### Methodology

The project formed three elements; questionnaire, interviews and an interactive workshop. The questionnaire was sent to 1800 voluntary and community organisations working in the Leeds area. The response to the survey was a rate of 65 organisations returning completed questionnaires representing a response rate of 3.61%. Interviews were held with 19 senior managers of Third Sector organisations and with senior representatives of 7 Leeds based commissioning agencies. A commissioning good practice workshop was attended by 25 senior staff from Third Sector organisations.

### Time constraints for the Third Sector

The major gap highlighted by the research was lack of time for the Third Sector to engage in commissioning. The results of the questionnaire showed 82% of respondents do not have enough time to engage with the commissioning process. The lack of time is considerably higher than all other elements that are lacking with 68% of respondents saying that lack of skills and resources act as a barrier to competing. In particular most Third Sector senior staff who were interviewed, or took part in the workshop were concerned about the time involved in forming partnerships, setting up consortia from scratch, compiling personnel information, recruitment planning and research. The concern was mirrored by a request for guidance about how much time is needed to be invested in their preparations to compete for tenders.

### Lack of knowledge and communication around commissioning

The Third Sector organisations involved in the research are largely unaware that the Supplier Contract Management System (SCMS) is used by 14 local authorities including Leeds City Council procurement unit to make sure that all registered organisations are given a fair opportunity to tender for work monitored in a structured way. It will be difficult to achieve a level playing field if over half, 55% of the Third Sector organisations involved in this research have not heard of SCMS. Almost half the Third Sector organisations involved in the research were unaware of the Compact which provides support and guidelines available through the codes of conduct. There was a clear request from Third Sector organisations to have more access to commissioning timetables and publicised tender specifications as early as possible.

Third Sector senior staff expressed the concern that more care is needed by commissioners in making sure there is a common language used in the commissioning and procurement processes. Language and terminology is often misunderstood and unclear to the Third Sector. Results from the research highlighted the need to raise awareness around terms like invitation to tender, expression of interest and full cost recovery. This lack of understanding and use of the terminology and support mechanism highlights the long journey that some Third Sector organisations still have to make in order to be tender ready.

## Under-representation of Third Sector at design stage

The research highlighted that there are few effective strong communication links between Third Sector senior staff and commissioners which makes representation of the needs of service users, communities and vulnerable groups difficult. Without having the conversations, meetings and joint attended events involvement in the design stages is restricted. More than half of the Third Sector involved in the research said they did not have a working relationship with commissioners even though almost a third held contracts with them. The initial conversations at pre-design stages rarely happen and there was a concern that there is a lack of guidance from commissioners and Third Sector support agencies on how this can be facilitated. Third Sector senior staff said very clearly and unanimously that there was not a range of opportunities to meet commissioners and have direct communication with them. At these meetings Third Sector organisations would like tenders to be explained by the commissioners, face to face, with more information from commissioners about their strategic plans and a clear talk-through of the guidelines of their tenders. The Third Sector is ready to have the conversations that will result in appropriate tenders to apply for, and feel that commissioners need to understand what they can do for them.

## Gaps in technical support provision to the Third Sector

Throughout the research, messages from Third Sector senior staff were clearly saying that they needed more support and advice from commissioners and skilled Third Sector providers with filling in the application forms with clarification and understanding of what commissioners want. There were also fears and concerns about what can be done when specifications are not clear in particular discussing issues to resolve cost and pricing issues. The Third Sector also wanted support and advice on who to ask for help at different stages of the process and requested a chance to experience submitting trial tenders. There was a consensus that there needs to be a central role providing an overview of terminology. More technical skills were requested in areas such as administration, personnel, legal support in forming consortium and partnership advice. There were numerous requests for facilitation and independent assessment of readiness to check organisations have the right policies and procedure in place in particular around evaluation, monitoring and information managements systems. Some asked for events that could provide tangible examples of successful tenders supported by a commissioning toolkit or guidelines. Third Sector senior staff also want support in planning for how to market to commissioners the many services they can provide that reflect innovation, value for money and expertise working with vulnerable groups.

## Moving forward

There was a genuine commitment from the 7 commissioning agencies who were involved in the research that they would like to see dovetailed training that is beneficial and aligned to their strategic aims. Third Sector senior staff highlighted that there are advantages from learning from peers and a desire to tap into the wealth of experience that exists within the sector. Requests were made to showcase success in a toolkit or to broker links with organisations who have a track record in winning and delivering public sector contracts. Some Third Sector organisations willingly offered to provide this mentor style support, others are committed in principle but would struggle because of perceived issues like time constraints and competition.

Like in any other major city, the Third Sector of Leeds is not a homogenous group, therefore the training recommendations in the report (overview on page 19) profile that the approach of the training events and workshops would benefit from being delivered on three levels; Beginner, Intermediary and Advanced matched to organisational level of need. Alongside general and technical support at events and workshops, guidance notes and website, it is recommended that the specific needs of individual organisations is met in a bespoke tailored format suited to the time constraints and learning styles of each organisation.

## 1.1 Background

Leeds Voice, the Community Empowerment Network (CEN) for the city of Leeds, commissioned this training needs analysis in order to gain an independent view of the knowledge and experience of the Third Sector and their understanding of the commissioning and procurement processes in Leeds. The research was conducted over a seven week period. The report offers recommendations to the following questions. In Leeds, how aware of commissioning / tendering processes are Third Sector organisations? How procurement ready is the Third Sector in Leeds? What commissioning / procurement training is needed? What would be the best way to address identified needs?

The Third Sector of Leeds, it's representatives and commissioners all need to do more to ensure that commissioning training and partnership working are tailored, meaningful, appropriate and most of all well planned. In this snapshot of commissioning training needs there is a minority of Third Sector organisations in Leeds who have the policies, resources and capacity needed to win and manage a range of successful contracts to deliver services. The report illustrates a rich, diverse tapestry of not for profit collectives, groups and organisations that make up the Third Sector in Leeds. Along with this diversity in size and potential for delivery (from small groups of volunteers, right through to National charities) the research report demonstrates how the Third Sector of Leeds, like in all other major cities of the UK, is not a homogenous group. The Third Sector organisation in Leeds cannot be trained in a uniform way nor approached by commissioners in a prescribed fashion. The recommendations from this report outlines an overview of a general training programme as well as recommendations that are bespoke and tailored to individual organisational need.

## 1.2 Policy in context

The context for this research is a major commitment - both nationally and locally - to improving the efficiency and effectiveness of Third Sector engagement in commissioning process to compete for and win public sector contracts. The Vision for Leeds 2004 - 2020 states clearly that **"Our Vision for Leeds is an internationally competitive European city at the heart of a prosperous region where everyone can enjoy a high quality of life"** and makes a clear commitment to brokering the links for the Third Sector and public sector agencies in that **"We need to make sure that we use public money and voluntary efforts to achieve our priorities, particularly within the communities where needs are greatest"** which is profiled in the LAA National Indicator 7 (NI7).

In March 2009 'Working Together, Public Services on Your Side' profiled that **"The capacity of third sector organisations to deliver excellent and innovative public services in local communities has significantly improved. Government investment in the third sector has doubled since 1997. The Compact, signed in 1998 between the Government and the third sector, sets out the code for a partnership which gives charities and social enterprises fair terms of engagement, while protecting the unique qualities of third sector organisations"** The report goes on to make a commitment of financial investment in the capacity of the Third Sector as a key partner in strengthening communities and promoting the role of social enterprises as a business model to achieve social change.

'Working Together, Public Services on Your side' outlines support provided by the government action plan, that will increase the opportunities for the third sector to bid for contracts, through the 'Right to Bid' to provide welfare to work services, going live in 2009. The report also outlines that the Compact between Government and the Third Sector will be refreshed to improve commissioning and engagement.

The Office of the Third Sector in their 2008 baseline report 'Evaluation of the National Programme for Third Sector Commissioning' recommended training not only for the Third Sector to build the capacity to overcome time constraints and skills barriers, it also concluded that training is needed for the commissioners themselves to understand the strategic priorities of the Third Sector. Their research highlighted a need for training and development for commissioners and procurement officers. Most commissioning organisations had not yet trained their commissioning staff on the involvement of the third sector, although some said they had planned this for the future. **"Around a quarter (23%) of commissioning organisations said that commissioners in their organisations had received training or development around the third sector's involvement in commissioning in the last two years. Some 59% said either that training had not been provided, or did not know whether it had been provided"** In reflection after the recent round of Public Sector Procurement and commissioning training delivered by OTS and IDeA, the Public Sector Partnerships team at the Office of the Third Sector points to further training needs **"The specification for Phase 2 of the National Programme on Third Sector Commissioning includes a commitment to help improve the bidding capacity of third sector organisations that wish to bid for public service contracts. Providers need to be aware of the range of different public sector commissioning environments, e.g. DH World Class Commissioning, NHS standard contracts and related guidance. There is also a need for providers (but this equally applies to commissioners) to understand the principles and practice of personal budgets and personalisation"** The perception from the Public Sector Partnership Team's Policy officer is that Leeds Third Sector organisations face similar difficulties as the rest of the UK, **"What I gleaned from the events run by IDeA suggests that, essentially, the training needs for the Third Sector of Leeds is the same as the general UK scene. Indeed, I have been struck by how often the same key issues for the sector arise around the country"**

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*When tender opportunities come through that are appropriate to our service we find it difficult to get involved when there is little or no guidelines, lack of time and commissioners seems to have no appreciation of the fact that there is not much money in the voluntary sector to employ bid writers, certainly not in our organisation.*

*Bev Gibbons, Reaching Out Service Manager, BARCA Leeds*

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This commitment at national level is mirrored by that of Leeds City Council. In their recent procurement briefing document 'Helping to Improve the Sustainability of Leeds City Council's Purchasing Decisions' there is a firm commitment to investing in the third sector, **"The Council has already picked its priorities, of which NI7 – 'environment for a thriving third sector' is highly pertinent to sustainable procurement"** the document profiles how the strategic outcome of harmonious communities will be to **"Enable a robust and vibrant voluntary, community and faith sector to facilitate community activity and directly deliver services"** Leeds City Council outlines in this document that it spends millions of pounds every year on contracts with private and voluntary organisations for goods, works, and services. **"Promoting equality and diversity through procurement is important. Leeds City Council has committed to developing their approach to ensure all services whether delivered directly or through a contractor or commissioning arrangement, take equality considerations into account"**

Leeds City Council and partners have made a commitment where possible to adhere to the Compact; administered by Leeds Initiative the Local Strategic Partnership (LSP). The Compact for Leeds in September 2003, is a voluntary agreement between the LSP and the Third Sector. It is built upon four key principles; promoting equal partnerships, encouraging the effective use of resources, improving the quality of communication, consultation and information exchange, recognising the role and value of volunteering and community activity. Codes of practice for three of the four key principles have already been developed, including the revised code for resources which is now the commissioning code of practice. The code of practice for improving the quality of communication, consultation and information exchange is due to be published shortly. A toolkit for dealing with disputes has also been developed. The four principles should be upheld throughout the commissioning process.

Funding for social care support provided by the Local Authority is changing from grants towards contracts in Leeds and this will impact on the Third Sector's ability to plan for sustainable future of service provision. The Personalisation agenda is generating concern for third sector organisations. The procurement team of Adult Social Care is committed to be involved in supporting the Third Sector of Leeds through the Supporting Links to Commissioning training programme and attending workshops and events during this period of transition.

It is at this time that the Supporting Links to Commissioning can broker the relationships needed to include the Third Sector of Leeds in the strategic planning in partnership with Adult Social Care and NHS Leeds. NHS Leeds has outlined its commitment to partnership in commissioning of services along with Leeds City Council Adult Social Care **"NHS Leeds is working with Leeds City Council to put in place partnership arrangements (the Healthy Leeds Commissioning Board and supporting structure) that will enable effective involvement to inform and support the planning and delivery of improvements in health and wellbeing, including high quality health and social care services. These partnership arrangements will take the form of networks that will include representatives of the public, service users and carers, the voluntary, community and faith sector, clinicians and other health and social care professionals"** These partnerships will provide opportunities for the Supporting Links to Commissioning project to support Third Sector involvement in the design stages of commissioning for Adult Social Care. The commitment from the commissioning team at Adult Social Care is clear.

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*We encourage voluntary organisations to let us know about the full range of services they offer, something like a menu to choose from would be useful when we are in design stages of commissioning. We appreciate that we need to develop our language and are happy to link in with this project to make sure specifications and tendering processes are easier for the voluntary sector to engage in and understand*

*Sinead Cregan, Adult Commissioning Manager, Adult Social Care Leeds City Council*

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NHS Leeds in their 2008 – 2011 strategy 'For Better Health for All' outline that **"There are few, if any, priorities that NHS Leeds is able to deliver alone. The success of NHS Leeds, with practice based commissioners and the Leeds City Council, in delivering its strategy is dependent on sustaining and developing strong and innovative partnerships with the statutory, voluntary, community, faith and independent sectors."** This commitment to working with others to provide excellence in services is a key element of the vision of NHS Leeds, as highlighted in objective 7 of their vision **"We will commission high quality care from a broad range of providers"** and state clearly that **"It is the responsibility of NHS Leeds to ensure the delivery of high quality, innovative and appropriate services that meet the diverse needs of patients, service users and carers in Leeds and reflect the values of the NHS."** To achieve this, NHS Leeds intend to work with existing and new providers from the NHS and the Third Sector to commission services which promote and support the health and wellbeing of the population of Leeds with the target by 2013 that **"a minimum of 5% of all services commissioned by NHS Leeds will have been subject to market testing through tendering"** and also by 2013 **"NHS Leeds will increase the number of patients who receive treatment through new pathways developed by practice based commissioners"**

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*"We encourage the third sector to work with us on design when we are stimulating the market, we want to know what innovative and effective services there are on offer. We are providing training internally to our procurement team to make sure that the transition is managed from traditional funding approaches; service level agreements and grants to contracts. We will also be making providers aware of the timescales when funding will be changing over to tenders in advance. We want to see outcomes for our investment and we want to see the third sector thrive"*

*Philip Robson, Commissioning and Procurement Team Leader, Education Leeds*

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For those Third Sector organisations in Leeds, providing education, skills and training services the process of engagement becomes fragmented and good practice patchy. The commissioning agencies they can promote their services to vary greatly in organisational size and procurement practice from local commissioning agencies like Education Leeds right through to regional and national organisations like the Learning and Skills Council or Jobcentre Plus, each with their own understanding of and ways of working with the Third Sector.

Education Leeds has made a commitment through this research to ensuring the training delivered through the Supporting Links to Commissioning training programme is dovetailed to the training needs of their procurement teams.

On a regional level, the Learning and Skills Council's cycle of commissioning starts with a statement of priorities in which they make specific mention of the Third Sector and any commitments about their work with the sector for the forthcoming year. The LSC although working regionally have made a commitment to supporting local need "Our commissioning plans act as the guide for what we wish to buy at national, regional and local level. We procure at regional level and our arrangements for buying services have been carefully considered so that they include third sector organisations and do not inherently disadvantage any smaller, locally based organisations."

On a national level, Jobcentre Plus' commitment to the Third Sector is found to have strong local roots in its local and regional partnerships. ACEVO in their February 2009 report 'The Potential Role for the Third Sector in Welfare to Work Reform' profile how the Third Sector is uniquely well placed to take the collaborative, effective, localised and speedy action that will be needed to mitigate the worst of the recession's impact. The concern raised in the report is "The introduction of larger, outcome-led, welfare to work contracts has already led to the influx of a number of big, mainly private sector, contractors into the market. TSOs find it difficult to engage with prime contractors, particularly in identifying opportunities and negotiating contracts that are fair to both parties. Some evidence pointed to a worsening relationship between prime contractors and TSOs as a result, with the risk of poorer outcomes for DWP clients"

The lack of coordination across all public sector commissioning processes makes it increasingly difficult for Third Sector organisations to plan and bid for contracts. Commissioning agencies should be encouraged to work collaboratively. The Office of the Third Sector profiles this concern due to the variation in commissioning and procurement principles of different central governmental departments. This impacts on the extent to which different government departments see it as within their remit to invest in building capacity of the third sector provider base, and the extent to which departments are actively engaged in promoting Third Sector involvement in commissioning.

In 2008, an ACEVO Finance Hub report outlined a change in attitude that must take place in the sector to prepare for the tendering arena. "The effectiveness of third sector organisations in winning contracts for services, developing partnerships, or engaging agencies, can be enhanced by strengthening the negotiation skills of people who work for them" An investment in meeting this need must be made from within the sector and it also must be matched by investment by National and Local government to make this much needed negotiation a reality. ACEVO outline in their report an affirmation that "Third sector leaders must now regard their funders as 'customers' or 'clients', and accept the need to compete, and negotiate, for their business"

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*We have the expertise to compete for tenders and we have to spend a lot of time on our quality monitoring, and voluntary organisations need to up the standard, but we need support to do that. Training needs to be facilitated at a strategic level. We need to know what commissioners want to buy from us, we want to communicate the needs of service users and it is important for commissioners to embrace change when working with the voluntary sector.*

”

*Penny Bainbridge,  
Chief Executive, The Cardigan Centre*

## 2.1 Questionnaire

A baseline questionnaire was developed to gauge the level of Third Sector engagement in commissioning: measuring knowledge, skills and capacity. The questionnaire also offered the opportunity to state the specific training needs of the organisation and an option to choose the style of training suited to the organisation. 1800 Third Sector organisations in Leeds received the questionnaire by postcard. An e-mail marketing campaign was sent to 1200 Third Sector worker e-mails publicising the website and online questionnaire.



There were 7 questions asked on the postcard six of which were closed ended questions and provided statistical data. One question provided a space for the organisations to state what training gaps they had in relation to commissioning. The responses to the one open ended question were grouped together under general themes. The postcards, if returned after the training needs analysis publication, will still be recorded and included to inform the training programme as it develops over the next two years.

## 2.2 Workshop

As part of the Supporting Links to Commissioning programme, a "Good Practice in Commissioning Workshop" was held for 30 Third Sector members to gain a broad understanding of their training needs. The workshop was interactive and set against national and local commissioning good practice. Delegates carried out a good practice check list on their commissioning readiness and profiled their range of training needs.

## 2.3 Interviews

A list of 400 Third Sector organisations were selected based on size, turnover, and specialist interest. Of the invited organisations 42 responded of whom 30 were interviewed. Most interviews were held with senior staff at the offices of each organisation.

Interviews with the main commissioning agencies in Leeds was agreed in conjunction with Leeds Voice including NHS Leeds, Leeds City Council departments (including Adult Social Care and Children's Services) Education Leeds, Learning Skills Council and Job Centre Plus. Interviews with commissioning agencies were held with procurement and commissioning senior representatives, conducted at their offices. One interview was conducted over the telephone. All interviews were open ended conversations with notes taken during the interviews. Unfortunately some stakeholders and commissioning agencies were unable to partake in the interviews due to their own operational or time constraints.

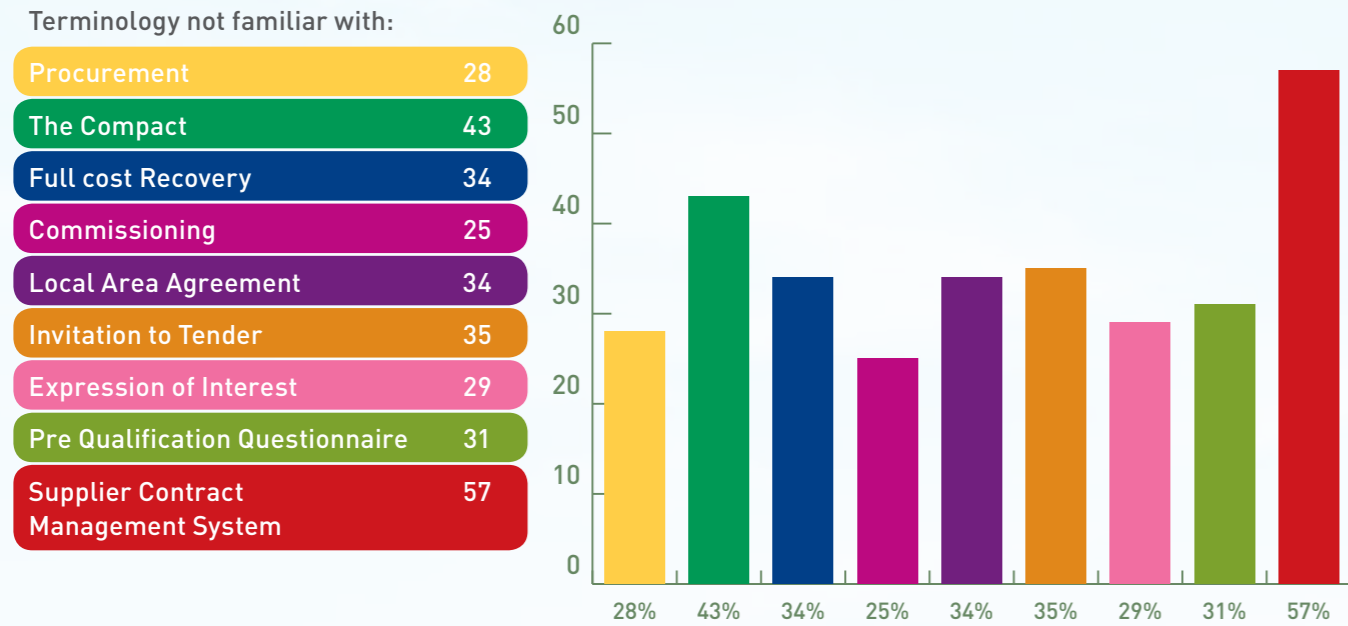
# 3 FINDINGS

## 3.1 Questionnaire postcard responses

### Question 1: Unfamiliar terminology and language

Q: Are you familiar with any of the following terms?

A: Procurement, commissioning, the compact, full cost recovery, invitation to tender, expression of interest, local area agreement, pre qualification questionnaire, supplier contract management system.



#### Results:

57% of respondents were not familiar with the Supplier Contract Management Service (SCMS). 43% of respondents were not familiar with the Compact. 35% were not aware of the term invitation to tender and 34% were unaware of the terms full cost recovery and Local Area Agreement. The terms that the Third Sector is most aware of are commissioning and expression of interest.

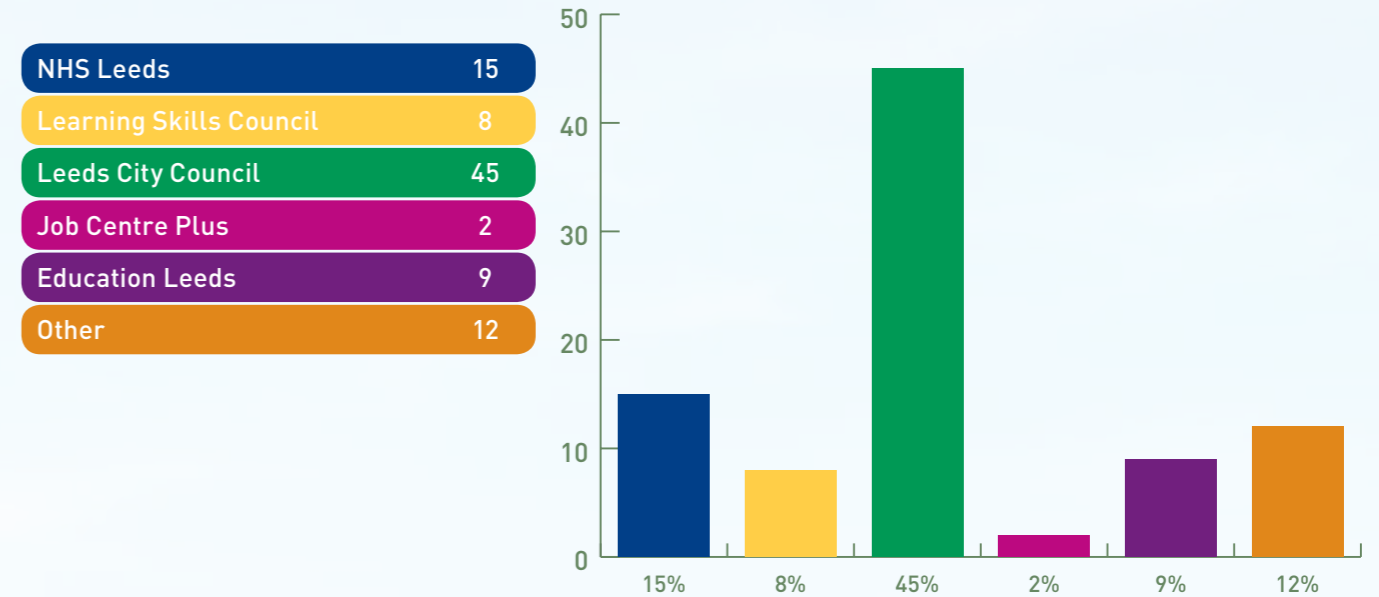
#### Recommendations

- Supporting Links to Commissioning to provide basic awareness seminar/ conference with exhibition style stands for Commissioning Agencies to display their strategic Aims
- Supporting Links to Commissioning to publish a glossary of terms
- Advertise the glossary of terms on the Funds for Leeds website
- Third Sector organisations commit to their strategic planning the principles of good practice in commissioning within their strategic planning
- Statutory organisations commit to the 8 principles of good commissioning as laid out by IDeA in the 'National Program for Third Sector Commissioning'
- Ensure that the glossary of terms is included in all commissioning events delegate packs
- Work with Leeds City Council's Corporate Procurement Unit (CPU) to schedule a ½ day workshop on how to access and use SCMS, facilitated by the SCMS team
- Supporting Links to Commissioning to provide guidance on the Leeds Strategic Plan (The Local Area Agreement), full cost recovery and Compact.

### Question 2: Contracts the Third Sector has tendered for and won

Q: Have you tendered for contracts from these organisations?

A: Leeds NHS, Jobcentre Plus, Learning Skills Council, Education Leeds, Leeds City Council, other.



“We support a range of efforts to ensure that the Third Sector were supported in being effective and competitive however we do not deliver direct support to the Third Sector here in Leeds. There are targeted funds that the RSA are involved in for example through support programmes like Urbanbiz, and Leeds Community Foundation as well as the Camberwell Project all tasked with the remit of supporting local Social Enterprise Helen Thomson, Assistant Director Economic Inclusion, Yorkshire Forward”

#### Results:

36 (56%) Third Sector organisations have tendered for public sector contracts. Of those who have, the major contractor they tendered for was Leeds City Council with 45% of the respondents bidding for contracts with them. The percentage falls dramatically to 15% for NHS Leeds and 12% bidding for contracts with other commissioning agencies which were; Department of Business, Enterprise and Regulatory Reform (BERR), Equality and Human Rights Commission, Connexions West Yorkshire, Home Office, Yorkshire Forward, Keeping House, Newcastle City Council, Wakefield Metropolitan District Council and Department of Health (DoH). 2% of the Third Sector respondents had bid for contracts with Jobcentre Plus, 8% with the Learning Skills Council and 9% with Education Leeds.

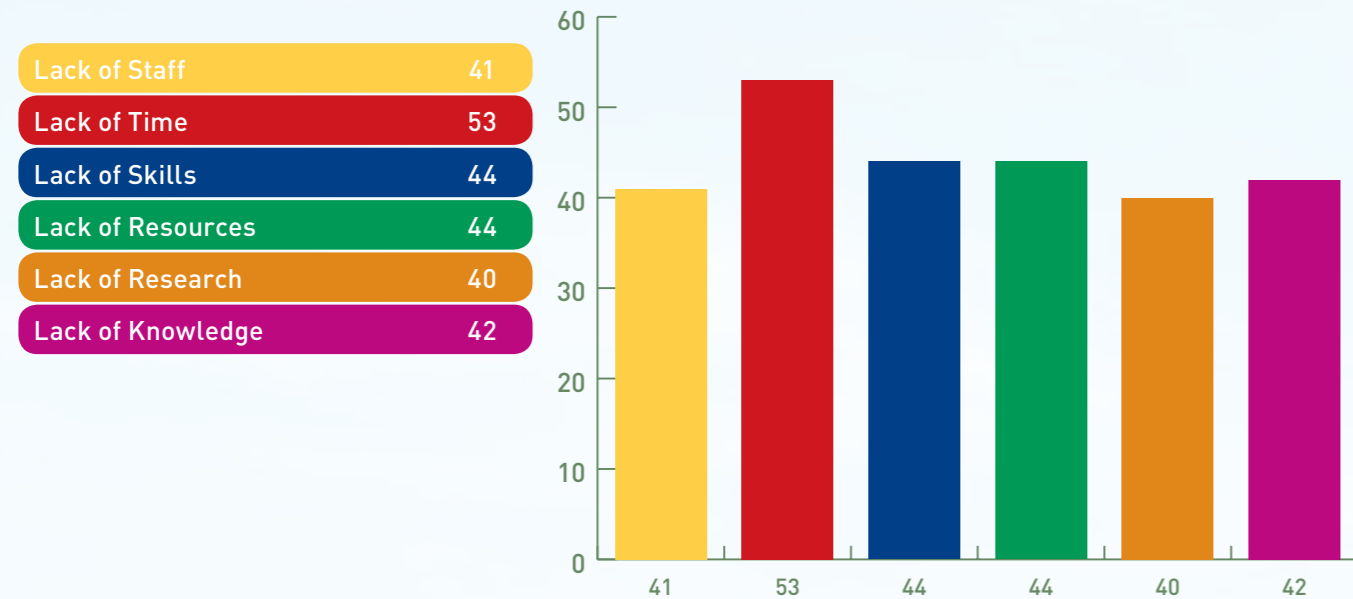
#### Recommendations

- Commissioners promote their strategic priorities via the Funds in Leeds website for Third Sector organisations to view and comment on
- Existing contracts information to be held as a register on the Funds in Leeds website. Information to be provided by procurement units in statutory organisations to the Supporting Links to Commissioning project
- Upcoming opportunities to be published on the Funds in Leeds website. Commissioners to provide the information to Supporting Links to Commissioning project as soon as details are available
- Supporting Links to Commissioning to profile the success of the Third Sector in securing contracts with case studies
- Supporting Links to Commissioning to broker links between successful organisations experienced in tendering and winning and organisations who are new to commissioning and procurement practices
- Third Sector organisations to send their strategic aims to the commissioning and procurement teams of the appropriate statutory organisations they would like to sell their service to.

### Question 3: Lack of capacity

**Q:** Does your organisation lack capacity in any of these areas which prevents you from tendering for public sector contracts?

**A:** Staff, time, skills, resources, research, knowledge



“As the centre manager, I have a dual role as delivering and developing the service which takes up a lot of my time along with numerous meetings and essential representation work. My concern is that for competitive tendering we will need to prepare and have research and statistics to evidence the impact of what we do here but how do we do that?”  
Nahid Rasool, Director Shantona Womens Centre

#### Results:

The highest area of capacity that is lacking in the Third Sector when it comes to competing for public sector contracts is time with 53 (82%) of respondents stating that not having enough time prevents them from bidding and being engaged in the commissioning process. The lack of time is considerably higher than all other elements that are lacking with 44 (68%) of respondents saying that lack of skills and resources act as a barrier to competing. Of the 65 Third Sector respondents 63% said they did not have the staff in place to engage in the tendering process and only 65% lacked knowledge needed to be involved in commissioning.

#### Recommendations

1. Commissioners to commit to the promotion of themes/ schemes of tender opportunities so that Third Sector organisations can prepare research, consortia, and job descriptions.
2. Commissioners to work collaboratively on procurement briefings and inform Supporting Links to Commissioning of upcoming tender briefings to publicise to Third Sector interested parties.
3. Supporting Links to Commissioning to tailor training and support in a timely way that takes into account the time barrier on many organisations
4. Supporting Links to Commissioning to produce and circulate a good practice in commissioning health check
5. Third Sector organisations to invest time in preparation and planning and carry out regular commissioning good practice health check as provided by Supporting Links to Commissioning

### Question 4: Support in commissioning

**Q:** What support do you need to become tender ready?

**A:** (Note to the reader: a blank space was provided for comments)

#### Results:

Links with commissioners	<ul style="list-style-type: none"> <li>• Initial conversation pre-design stage</li> <li>• Extra guidance from commissioners</li> <li>• Opportunities to meet commissioners</li> <li>• Direct communication with commissioners</li> <li>• Tenders explained by the commissioners face to face</li> <li>• More information from commissioners about their plans</li> <li>• Commissioners talk through the guidelines of the tender</li> <li>• Appropriate tenders to apply for, commissioners need to understand what we can do for them</li> </ul>
Technical support	<ul style="list-style-type: none"> <li>• Support and advice with filling in the application forms</li> <li>• What to do when specifications are not clear</li> <li>• Resolving cost and pricing issues</li> <li>• Advice on who to ask for help at different stages of the process</li> <li>• A chance to experience submitting trial tenders</li> <li>• Overview of terminology</li> <li>• Consortium and partnership advice</li> <li>• Independent assessment of readiness</li> <li>• Helpline for tender preparation</li> <li>• Good practice toolkit</li> <li>• Tangible examples of successful tenders</li> <li>• Legal support</li> <li>• Check we have the right policies and procedure in place</li> </ul> <p>“We just don't have the time to attend lots of meetings and events, even though we would love to. We would welcome support with administration like writing action plans and minutes and helping us move forward as the timescales are always tight in commissioning” Louise Megson, Group Manager, St Luke's CARES</p>
General awareness	<ul style="list-style-type: none"> <li>• Overview of what is needed to be tender ready</li> <li>• Information on the tendering process in general</li> <li>• Outline of the bidding process with all staff</li> <li>• What work is actually involved before we start</li> <li>• General understanding of procurement</li> <li>• The basics in commissioning</li> <li>• What is ahead of us</li> <li>• Understanding of the whole process</li> <li>• Detailed view of commissioning organisations</li> <li>• Understand what is expected of us</li> <li>• Basic general awareness of what is commissioning</li> </ul>

Inspiration, confidence building and innovation	<ul style="list-style-type: none"> <li>• Ideas on how far we could go, what is our potential</li> <li>• Opportunities to share our experience</li> <li>• Mentoring process</li> <li>• Is it a realistic option for us to tender</li> </ul>
Funding and resources	<ul style="list-style-type: none"> <li>• Funding to provide staff</li> <li>• One-to-one support to fill in bids</li> <li>• Consultancy support</li> <li>• More capacity support</li> </ul>
Advertisement and promotion of tenders	<ul style="list-style-type: none"> <li>• Clear direction to where on LCC website the tender is advertised</li> <li>• Early warning of contracts available to bid for</li> <li>• Timely awareness of tender opportunities</li> <li>• Information sessions on tenders due for advertising</li> <li>• Where are the tenders displayed</li> <li>• When do contracts become available</li> <li>• Identifying appropriate tenders and partners</li> </ul>
Policy and research	<ul style="list-style-type: none"> <li>• Research guidance, how much to include</li> <li>• More guidance on local area agreements</li> <li>• Risk assessments and pricing support</li> </ul>

### Recommendations for the Supporting Links to Commissioning (SLTC) project

- Organise an ideas carnival with Third Sector organisations invited to profile the services they can deliver and commissioners invited to profile up-coming opportunities available for tender
- Produce an overall document that profiles the support to the Third Sector from the supporting links to commissioning project
- Design and promote a commissioning toolkit which guides Third Sector organisations through the commissioning process
- Use the Funds in Leeds website to create and update a contracts register and commissioning calendar for Leeds City Council and other statutory bodies to contribute to
- Produce a list of commissioning posts held within Leeds detailing commissioning agencies' specialist areas and contact details
- Develop a training programme that encompasses existing training provision

### Recommendations for Commissioning Agencies

- Provide information on existing contracts and grants, upcoming opportunities and strategic aims to improve transparency in the commissioning process
- Commit to attending an ideas carnival to publicise their strategic aims and meet potential providers from the Third Sector
- Commit to supporting the training programme where appropriate

“We would need to know which commissioners would like us to provide brokerage services, working with businesses in the field of regeneration and getting involved in commissioning, without knowing this there is a threat to take us away from the actual work. We would find it very hard to tender unless we were able to speak to the procurement teams about what we can deliver on, enterprise, education, economy and employment” Stephanie Burass, Chief Executive, Leeds Ahead”

### Question 5: Relationship with commissioners

**Q:** Do you have a working relationship with commissioners?

**A:** Yes, no.

#### Results:

Only 45% of respondents said they had a working relationship with commissioners. Of the 36 respondents that have tendered for public sector contracts 66% said they do not have a working relationship with commissioning agencies. Of the 29 respondents who have not tendered for public sector contracts, 76% said they do not have working relationships with commissioning agencies.

#### Recommendations

- Commissioners to commit to attending regular 'Meet the Commissioners' events at various venues across the city.
- Supporting Links to Commissioning to design and promote a series of 'meet the commissioners' events with interactive mini lectures / workshops / question time aimed at beginners, intermediate and advanced
- Brokerage events with commissioners and themed groups of Third Sector organisations

“The Learning and Skills Council has a strong tradition of engagement with the sector to generate commissioning practices that reflect the needs of vulnerable communities. In the region we meet every 2 months with representatives from the voluntary sector, chaired rotationally so that it alternates between a VCS and LSC representative. The agenda is more responsive in that way and it ensures there is strong strategic communication between us and the third sector. In advance of tenders we hold preparation events to discuss with potential providers from the third sector”

Andy Brown,  
Regional Director for Learning,  
Planning and Performance,  
Learning and Skills Council

“We need more advance notice of tenders, the time constraints make it difficult to make partnership links and get the right information in order, we would like to be in a position to plan better to make tenders”

Jason Slack, Fundraiser, The Hunslet Club

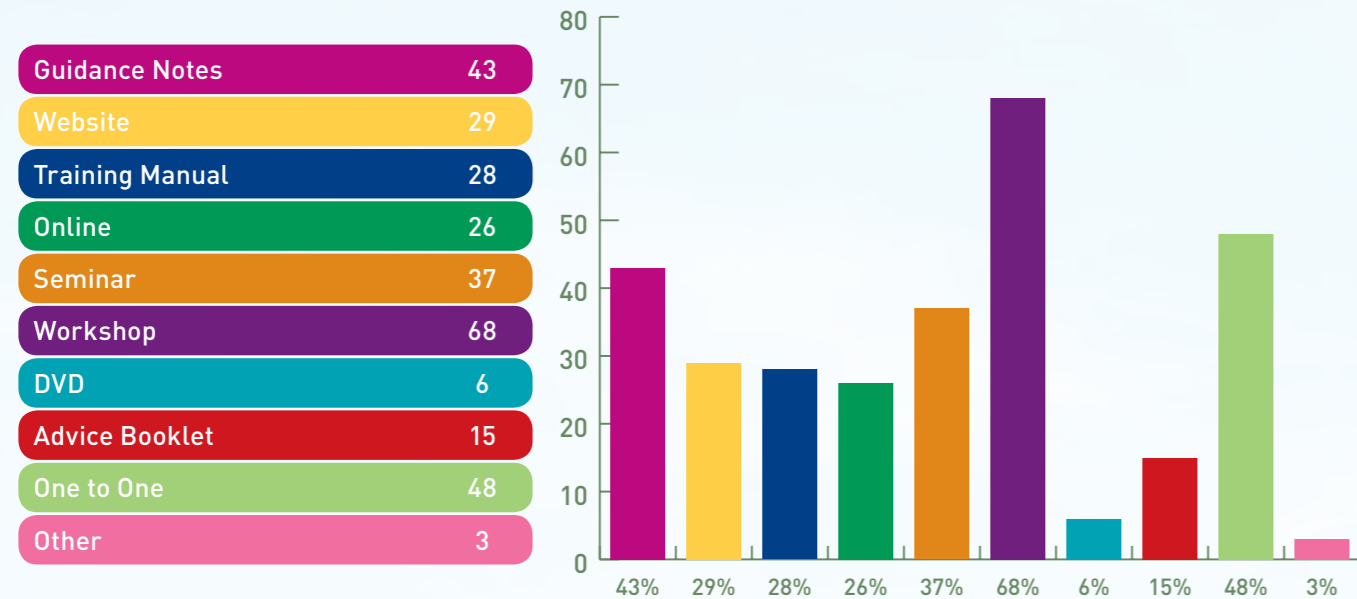
“We have to think very carefully if commissioning is right for us. It would be useful if there was an external support fund for the difficult HR issues like pensions, maternity pay, J11PE, legal costs, sick pay. Do we include all these costs in our full cost recovery or are we expected to fund that ourselves. Partnership working is difficult when that involves our competitors who may be statutory bodies or larger charities who include HR costs in their bids”

Claude Hendrickson, Manager 10 - 2 Club

### Question 6: Organisational training styles

**Q:** What level of training would best suit your organisation?

**A:** Guidance notes & case studies, website, training manual, online resource, seminar, ½ day workshop, DVD tutorial, advice booklet, one to one tutorial at work, other.



“We need to know the differing communication styles of the other commissioners, we don't know where to or even how to meet with them. We would like to see more support in group activities and share the advice that is out there with practical work and real examples of how to do it

Laure North, Co-ordinator Leeds GATE (Gypsy and Traveller Exchange)

#### Results:

The most popular form of training chosen by 68% of respondents, was the ½ day workshop. The second preferred style of training was the one-to-one tutorial, followed closely by 43% choosing the option of training by guidance notes and case studies. Training by means of seminar was chosen by 37% of respondents. The least popular forms of training were a DVD tutorial and the advice booklet

#### Recommendations

1. Supporting Links to Commissioning to provide training in a workshop format, marketed to Third Sector at least 6 weeks in advance
2. Design and produce a menu of generic one-to-one 2 hour health check workshops that can be delivered in the workplace
3. Promote a one-to-one service pro-forma for the organisations to specify the bespoke one-to-one support needed
4. Design and produce a guidance manual with real case studies profiling success

“We need support from this project in the way of general information around the basics of outcomes and outputs and working examples of how to quantify our unit price. One to one support would be useful in terms of understanding strategic commissioning links and how to forge partnerships in commissioning. An overview event of the principles of commissioning with the different commissioners presenting would be useful”

Ant Hanlon, Chief Executive, Leeds Irish Health and Homes

### Question 7: would you partake in training if offered?

**Q:** If tender preparation training was offered, would you attend?

**A:** Yes, no.

#### Results:

80% of respondents said they would take part in training if it was offered. Of the 36 respondents who have experience in tendering 75% said they would partake in training if it was offered. Of the 29 Third Sector respondents who have not tendered for public sector contracts, 90% said they would partake in training.

#### Recommendations

1. Provide a flexible, time structured series of workshops which are followed on by specific thematic workshops
2. Promote the training in a 12 month timetable format, so that smaller organisations have a clear outline of the training opportunities throughout the year
3. Design the session so that it can be delivered in small groups or one-to-one in the workplace

“We really need this training. We need help to match tendering opportunities to our service needs and the product we can provide. We want this project to make links with the commissioners and procurement people and let them know about the range of tailored services we can deliver to people with learning disabilities and their families.

Frank Plumbridge, Chief Executive, Leeds Mencap

“Yes, we would partake in training if it was provided. It would not be myself, but about 10 of our service managers might.

John Anderson, Director of Planning and Development, Community Links (Northern)

“Yes we would partake in training with sufficient notice.

Barbara Vempe, Community Services Manager, Connect Housing

“We would come to the training on the Supporting Links programme as long as the content was appropriate to our needs and the timing was right.

John Preston, West Yorkshire Manager, BCFTV Hollybush

## 3.2 Interviews

Interviews were conducted with 30 Third Sector organisations as well as 7 commissioning agencies. The interviews were informal and lasted for around one hour. Brief notes were taken during the informal interviews and general comments made are outlined below. The training needs of the Third Sector organisations who were interviewed have been grouped together in general themes.

<p>Links with commissioners</p>	<ul style="list-style-type: none"> <li>Commissioners display knowledge of what BME communities need</li> <li>Conversation at design stages</li> <li>Advance notice to inform partnership working and consortia</li> <li>Commissioners appreciation of impact of time limitations on Third Sector</li> <li>Involved at design, learning from other local authority areas' good practice</li> <li>Get involved in holistic commissioning</li> <li>Get various agencies together to avoid the multiplicity of commissioners</li> </ul> <p>“ There is not enough conversation around the design stages and as a result when we see opportunities coming through, we find it difficult to understand what the commissioners are looking for. We are happy to help commissioners facilitate discussion at the design stages. By working with BME communities to know what services are available, we will achieve a win-win situation.”</p> <p>Tony Stanley, Chief Executive Leeds Racial Equality Commission</p>
<p>Technical support</p>	<ul style="list-style-type: none"> <li>Brokering service between experienced winning bid writers and new comers to commissioning</li> <li>Links to professional bid writers</li> </ul> <p>“ We want to know how to manage complex contracts that may have various partner organisations with different styles of working to us. We need help in the sector to formulate good ideas, it is difficult to identify potential partners, we need help in doing that.”</p> <p>David Wears Chief Executive West Yorkshire Learning Consortium</p>
<p>Thematic specialist advice</p>	<ul style="list-style-type: none"> <li>Personalisation agenda, planning for the transition in funding</li> <li>Facilitate discussion at the design stages with BME communities to know what is available</li> <li>Support in understanding public law services, clear information about contracts, SLAs, funding, equality and freedom of information</li> <li>Prepare and have research and statistics to evidence the impact of what the service does</li> <li>How to market to commissioners the many services the Third Sector can provide that reflect innovation and expertise</li> </ul> <p>“ Special attention needs to be paid to BME organisations in commissioning especially with an organisation like ours, who deliver tailored culturally sensitive services. How can commissioners ensure that tenders provide for culturally specific needs?”</p> <p>Ant Hanlon, Chief Executive, Leeds Irish Health and Homes</p>

<p>Partnership, relationships and managing consortia</p>	<ul style="list-style-type: none"> <li>How will we manage relationships and what are we obliged to do when partnerships break down</li> <li>How to manage complex contracts that may have various partner organisations with different styles of working to us</li> <li>It is difficult to identify potential partners, we need help in doing that</li> </ul> <p>“ We would find it useful to link our business managers up with the other organisations that can help fill the gaps in provision in areas of our work. We want to see innovation and bringing diverse services together in tenders. We are not yet at a stage to support other organisations however we can share our experience with others working in our sector.”</p> <p>Paul Bollow, CHIVA (Children in Vulnerable Accommodation) Co-ordinator Carr Gomm</p>
<p>Sharing good practice</p>	<ul style="list-style-type: none"> <li>Share examples of our success with other smaller organisations who may not have the skills or the expertise</li> <li>Share Third Sector experiences of specifications that are unfair or in breach of the compact</li> </ul> <p>“ We are happy to share our experiences with other organisations that fell specifications are unfair or in breach of the compact. It is difficult, but at St Gemma's we have to be very clear about the contracts we sign up to and not put our organisation at financial risk.”</p> <p>Bill Kilgannon Chief Executive, St Gemma's Hospice</p> <p>“ We would be happy to share examples of our success with other smaller organisations who we fear may not have the skills or the expertise to compete in competitive tendering.”</p> <p>Alison Lowe, Chief Executive, Touchstone Leeds</p>
<p>Innovation</p>	<ul style="list-style-type: none"> <li>We need help in the sector to formulate good ideas</li> </ul> <p>“ We want to be involved in the innovation, the design stages of commissioning and learn from best practice from other local authorities who are doing joint work to avoid the duplication and multiplicity of work requested from the Third Sector. We need some sort of external facilitator to represent us and other Third Sector organisations to have a holistic approach to the procurement of services.”</p> <p>Steve Williamson Chief Executive, Re'new</p>

## 3.3 Workshop

A 'Good Practice in Commissioning Workshop' was promoted to Third Sector organisations in Leeds, 23 Third Sector organisations attended who were either involved with or interested in the commissioning process. Two activities were delivered to ascertain the level of training needed.

### Activity 1: good practice self assessment

Delegates were asked to work in pairs interviewing one another from a list of statements which would be indicative of an organisation that had developed good commissioning practices. They had the option to strongly agree, agree or disagree with a weighted score attached to each statement. Those who scored mostly strongly agree were asked to join the advance good practice commissioning group. Those who scored mostly agree were invited to join the intermediate good practice group and those who scored mostly disagree were invited to join the beginners good commissioning practice group.

### Activity 2: Good practice commissioning MOT

Delegates formed 4 separate groups, one being an advanced group one intermediate groups and two beginners groups. They discussed in their groups what training and support would be needed to make sure they were operating in accordance with good commissioning guidelines.

The groups all had identical worksheets. After the activity was complete they were invited to comment on general requirements of their group which are tabled below. Although this workshop only can be used as a snapshot, it sets a precedent to ensure that training is catered to the broad range of skills and expertise of the Third Sector in Leeds.

Self assigned level of commissioning ability	Comments
Beginners	<ul style="list-style-type: none"> <li>• Courses are not always the answer, we need training that is suited to our needs.</li> <li>• HR support</li> <li>• How do we profile a track record</li> <li>• One to one support in the workplace, we don't have time to come to training</li> <li>• Staff development day, how do we do that with volunteers</li> <li>• How do we profile the talents/ strengths of volunteers</li> <li>• Sample/ standard one page draft policies</li> <li>• Market analysis 'how to' style workshops</li> <li>• Support to challenge commissioners on time slippage</li> <li>• Peer support, connect us with those in the know</li> </ul>
Intermediate	<ul style="list-style-type: none"> <li>• Share more good practice, how is it done well</li> <li>• Mentoring on all commissioning elements</li> <li>• Discussion with commissioners</li> <li>• What do commissioners want</li> </ul>
Advanced	<ul style="list-style-type: none"> <li>• Role of marketing in commissioning</li> <li>• Targeted work with middle management in commissioning agencies</li> <li>• Bid writing training</li> <li>• How do we tackle value added</li> <li>• HR, what does that mean to commissioners, is it what Third Sector means</li> <li>• How do we measure the outcomes of prevention</li> <li>• Who are the commissioners, we would like to meet them.</li> </ul>

## 4.1 Overview of findings

The findings of the research highlight that the Third Sector of Leeds needs tailored training and specialised, professionally delivered training. Like in any other major UK city, the Third Sector of Leeds is not a homogeneous group and we cannot afford to provide a 'one size fits all' training plan to meet the varying needs of the sector. The approach for a majority of the training events and workshops is based around the design concept of Beginner, Intermediary and Advanced level of need. Alongside this general and technical support at events and workshops, guidance notes and website, it is recommended that the specific needs of individual organisations is met in a bespoke tailored format suited to the time constraints and learning styles of each organisation.

## 4.2 Training plan overview

TRAINING NEED	RECOMMENDED DELIVERY STYLE	TIME/ RESOURCES/ CONTRIBUTORS
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To have a greater knowledge and awareness of the principles of good practice in commissioning

One day conference for circa 100 delegates of executive/ senior staff level with invited contributors and presentations from commissioning agencies in Leeds

- City centre, professional conferencing venue
- 6 weeks to plan and promote
- E-mail marketing/ booking service
- Flyer marketing and promotion, joint promoted by contributing commissioners
- 3 Leeds Voice core support/ admin staff
- 2 Leeds Voice facilitators
- 1 external commissioning facilitator

To be repeated every 6 months

To have a clear strategic aims, communicate them openly to appropriate commissioners, networks and potential partners

Design and deliver a series of ½ day interactive workshop each for circa 20 delegates on how to compile and communicate clear strategic aims. Offer all delegates at the workshops an easy to follow guideline that can be used in the organisation to document and communicate clear strategic aims to commissioners and others. Ensure delegates are split into groups according to similar commissioning skills basis: beginner, intermediate or advanced

- Local, Third Sector venues
- 2 days to design and plan the ½ day workshop and guidelines
- Ongoing year round promotion of the series of half day workshops by website e-mail/ flyer/ poster. Each workshop needs 6 weeks promotion.
- 2 Leeds Voice facilitators
- 1 external strategy facilitator
- 2 nominated Third Sector organisations deliver presentations of how they successfully communicate to appropriate commissioners/ networks and potential partners their clear strategic aims which helped them win tenders
- Distribution of the guideline on how to sustain clear communication of strategic aims
- Post examples of clear strategic aims of individual organisations on website reviewed/ changed every 3 months.
- Notify all Leeds Commissioning agencies of the intention of the workshop. Give notice that Third Sector organisations will be communicating their strategic aims. Ensure the design of the workshop reflects the differing ways commissioners like to be communicated with

4 ½ day workshops per year

**TRAINING NEED | RECOMMENDED DELIVERY STYLE | TIME/ RESOURCES/ CONTRIBUTORS**

<p>Evidenced knowledge of client groups and monitor research/ feedback based information about the people/ organisations they support.</p>	<p>Invite commissioners to host and partake in a series of 2 hour long seminars at their offices/ venues to discuss the types of research and monitoring of needs of service users they would like to see in bids. A facilitated Question and Answer session about how to profile research/ feedback and how much to include in bids/ applications.</p>	<ul style="list-style-type: none"> <li>• Commissioning agency venues</li> <li>• 2 procurement and commissioning representatives available to host the events</li> <li>• Joint promotion of the event by e/mail and website by both Leeds Voice and the commissioning agency</li> <li>• General guidelines and general agenda with pre-planned questions outlined in advance for 1 ½ hours of the session. ½ hour free flow opportunity for audience to ask questions</li> <li>• 2 Leeds Voice facilitators</li> <li>• 1 external research/ monitoring facilitator</li> <li>• Copies available for all delegates of the strategic aims of the commissioning agency</li> <li>• Each commissioning agency deliver at least one Question and answers seminar per year.</li> </ul>
<p>Market Analysis and Intelligence and evidence to demonstrate the service delivered is needed and effective. Knowledge of competitors and documentation of uniqueness</p>	<p>One to one health checks to profile the level of need and assign the organisation to a choice of 2 hour workshops for circa 12 people that will help to profile uniqueness and plan for evidencing the needs of the services they deliver. Invite speakers from Third Sector organisations who regularly monitor and evidence the need for their service to speak at the workshop</p>	<ul style="list-style-type: none"> <li>• Local community venues</li> <li>• 2 nominated Third Sector presenters</li> <li>• 2 Leeds Voice facilitators</li> <li>• 1 external marketing facilitator</li> <li>• ½ day to design the market analysis/ evidence health check</li> <li>• Promotion of the one to one support through e-mail/ flyer and phone</li> <li>• Promotion of the workshops by e-mail/ website and flyer</li> </ul> <p>Workshops to be held every month</p>
<p>Support to ensure the principles of good governance drives the organisation and challenges effectiveness and efficiency</p>	<p>Provide a 2 hour evening event for third sector executives and their trustees/ board members/ management councils to ensure that they are all aware of the need for good governance as a principal of good practice in commissioning. Provide offer of one to one support from interested parties to do a good Governance health check in relation to how it dovetails into the</p>	<ul style="list-style-type: none"> <li>• City Centre professional executive location</li> <li>• Drinks reception</li> <li>• 12 weeks to promote by e-mail/ website and letter</li> <li>• Overview of the Principles of Good Governance and how that dovetails with good practice in commissioning.</li> <li>• 4 Leeds Voice facilitators</li> <li>• 1 external governance facilitator</li> <li>• Representative from ACEVO on principles of Good Governance in relation to principles of good practice in commissioning</li> <li>• Guide to how to incorporate commissioning good practice in trustees/ board/ management agenda</li> </ul>

**TRAINING NEED | RECOMMENDED DELIVERY STYLE | TIME/ RESOURCES/ CONTRIBUTORS**

<p>Support to ensure policies and procedures are corralled in a in a central place, updated and reviewed every year.</p>	<p>An online resource of the easiest to use, recent templates of policies and procedures needed for third sector organisations relating to what commissioners are looking for. Guidance on how to generate CV and job descriptions ahead of tendering. One to one support to do policies health check</p>	<ul style="list-style-type: none"> <li>• Regular e-mail promotion of the online resource</li> <li>• Leeds Voice Liaise with all commissioning agencies to ask what detail policies need to have, how to lay them out, how to index them as part of bids.</li> <li>• Online resource to be updated monthly</li> </ul>
<p>Support to ensure there are robust finance systems in place with a clear understanding and application of Full Cost Recovery.</p>	<p>One day Full Cost recovery conference for circa 50 Third Sector delegates with presentation from procurement executives. Middle management/ officers. Also invite contributors from specialised financial/ accountant contributors. ACEVO/ NCVO contributors to promote the online (excel) FCR resource</p>	<ul style="list-style-type: none"> <li>• City Centre conferencing venue</li> <li>• ½ day to design the agenda for the conference, invite contributors</li> <li>• 12 weeks to promote the event</li> <li>• 4 procurement contributors from commissioning agencies</li> <li>• 2 financial facilitators, eg accountancy firms specialising in charity finance</li> <li>• 2 Leeds Voice facilitators</li> <li>• 1 Financial Hub/ ACEVO/NCVO contributor</li> <li>• Guideline handouts on FCR/ CD/ link to download FCR resource on the website with instructions for use</li> </ul>
<p>Support to forge and maintain relationships with similar delivery organisations. Meet with commissioners and partner organisations to discuss areas of expertise.</p>	<p>Hold a one day partnership fairs with representation from all Leeds based commissioning agencies and a cross section of third sector organisations invited to have exhibition stands with networking sessions incorporated into the second half of the event. Followed by smaller events in maintaining partnerships. Followed by one to one bespoke brokerage support to assign organisations to similar organisations that may be appropriate for prime contracting/ sub contracting or consortia partnerships.</p>	<ul style="list-style-type: none"> <li>• Large city centre location</li> <li>• 2 days preparation to plan the fair</li> <li>• 6 months to promote the fair in website/ contributors websites/ local press/ free press/ on agendas of commissioners and Third Sector organisations</li> <li>• Event management of the allocation of the stalls and co-ordination of delegate bags</li> <li>• Press and promotion co-ordination</li> <li>• 6 Leeds Voice facilitators</li> <li>• 1 external events management facilitator</li> <li>• All Leeds based commissioning agencies</li> <li>• Promotion budget</li> </ul> <p><b>Smaller events</b></p> <ul style="list-style-type: none"> <li>• Community venues</li> <li>• Promoted at the fair</li> <li>• 2 Leeds Voice facilitators</li> <li>• 1 external partnerships facilitator</li> <li>• Guidance notes for delegates</li> </ul>

## CONTRIBUTORS

### Commissioners and others

- Leeds City Council (Adult Social Care)
- Education Leeds
- Yorkshire Forward
- Jobcentre Plus
- Office of Third Sector
- IDeA
- Learning and Skills Council
- Regional Improvement Partnership and Efficiency Partnership

### Third Sector organisations

- 10 – 2 club
- ADS Leeds
- Advocacy Support
- Age Concern Leeds
- ASHA Neighbourhood Project
- Asian Business Development Network
- Archway
- Base 10/ Lifeline
- BARCA Leeds
- BCTV Hollybush
- Belle Isle & Dewsbury Rd Over 55s Club
- Behind Closed Doors
- Burmantofts Senior Action
- CAIWA
- The Cardigan Centre
- Carr Gomm
- Chapeltown CAB
- Change
- Community Action Roundhay Elderly
- Community Links (Northern)
- Connect Housing
- Crossgates Good Neighbours
- Dance Action Zone Leeds
- Dream Reality Ltd
- Education Leeds
- East Leeds Counselling Service
- Eclipse
- Feel Good Factor
- GIPSIL
- Groundwork Leeds
- Health for All
- Holbeck Elderly Aid
- Horsforth Live at Home Scheme
- The Hunslet Club
- Kirkstall Festival
- Leeds Advocacy
- Leeds Ahead
- Leeds Autism Services
- Leeds Black Elders Association
- Leeds Chinese Community School
- Leeds Gypsy and Traveller Exchange (Gate)
- Leeds Housing Concern
- Leeds Irish Health and Homes
- Leeds Mencap
- Leeds Muslim Consortium, Leeds Education Achievement Programme (LEAP)
- Leeds Racial Equality Council
- Leeds Sikh Welfare Foundation
- Little London Arts
- Mediation Leeds
- Mencap Pathway
- MMHA
- Moor Allerton Elderly Care
- Neighbourhood Action (Farsley, New Farnley, Moor Top)
- Oblong
- Older Active People
- People in Action
- People Matters (Leeds)
- Positive Care Programme
- Pudsey Civic Society
- REEMAP
- Re’new
- RETAS
- Richmond Hill Elderly Action
- RJC Dance
- The Salvation Army
- South Asian Arts UK
- Space 2 Leeds
- Shantona Women’s Centre
- St Anne’s Community Services
- St Gemma’s Hospice
- St Luke’s CARES
- St Vincent Support Centre
- Swarthmore Education Centre
- Touchstone
- Volition
- West Yorkshire Community Chaplaincy Project
- West Yorkshire Learning Consortium
- Women’s Counselling and Therapy Service

## GLOSSARY OF TERMS

CEN	Community Empowerment Network
CPU	Corporate Procurement Unit
ACEVO	Association of Chief Executives of Voluntary Organisations
ASC	Association of Sustainable Communities
ASC	Adult Social Care
BERR	Department for Business, Enterprise and Regulatory Reform
BME	Black and Minority Ethnic
DoH	Department of Health
DWP	Department for Work and Pensions
ESF	European Social Fund
FCR	Full Cost Recovery
IYSS	Integrated Youth Support Services
LA	Local Authority
LAA	Local Area Agreement
LCC	Leeds City Council
LCF	Leeds Community Foundation
LSC	Learning Skills Council
LSP	Leeds Strategic Plan, The LAA in Leeds
LSP	Local Strategic Partnership
LV	Leeds Voice
NCVO	National Council for Voluntary Organisations
NHS	National Health Service
OTS	Office of the Third Sector
PQASSO	PQASSO (quality assurance system for small organisations)
RDA	Regional Development Agency
SHA	Strategic Health Authority
SLAs	Service Level Agreements
SLTC	Supporting Links to Commissioning
VA-L	Voluntary Action Leeds
YF	Yorkshire Forward

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**TABRONA**  
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