

Making it Personal – Evaluation report on the Civic Partnership capacity building programme for the voluntary and community sector in Kirklees

13 January to 24 February 2010

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Introduction and overview – programme aims and objectives

A key theme of the Civic Partnership was to build the capacity of the voluntary and community organisations (VCO's) in Kirklees to deliver more effective and efficient public services...

The **Making it Personal** programme was designed to help VCO's build their understanding, skills and confidence in a range of key areas. The sessions on offer – all free of charge – aimed to help VCO's as they work towards becoming more resilient and sustainable in a fast changing operating environment. The programme had a practical focus and aimed to give participants the confidence and motivation to turn theory and practice into real action for their organisation.

The reason behind the programme – and the driver of the Civic Partnership is that public services – whether funded by grants or through commissioning – are in a state of transition. As services become more person centred, with individuals directing their own support or holding their own budgets – the marketplace in which VCO's operate is likely to change dramatically. Individuals will be exercising more choice and control on how their needs are met (starting with health and social care – but eventually moving into all other areas of people's lives).

VCO's will need to change the way they think about what type of service they offer, what difference it makes to people's lives, how they market their organisation and that the internal business systems and processes within are future proof and fit for purpose in a changing environment.

It's not just about adapting to a more personalised approach to services – it's about VCO's gearing up to be more sustainable in the light of the more general changes ahead. These include the shift to evidencing the impact and outcomes of services, an increasing pressure on public funding, the emergence of a more competitive operating market and new models of working such as collaboration, social enterprise and new income streams such as loans.

So the Making it Personal training programme offered an introduction to the type of areas that VCO's need to think about to ensure that systems, processes, staff and services are looking to the future and confident about their capacity to respond in a changing environment.

The idea was that the programme offered something for everyone – no matter how large or small the organisation or how new or experienced VCO's are in delivering services. The programme offered a menu of options for VCO's to select from. Ideally people would chose one or more sessions that are the priority issues for their organisation or that would help them to continue to improve services for the individuals, families and communities they work with in Kirklees.

Finally, there were also some mentoring support sessions available through the programme, offering professional advice on a 1:1 basis. Sessions were offered by fit4funding or West Yorkshire Community Accounting Services (WYCAS).

In terms of outputs and outcomes, the following targets were set for the training programme – and through the other interventions of the Civic Partnership:

- Up to 140 VCS organisations to benefit from training; 40 having access to mentoring support.
- 60 public sector workers to be involved in developing and trialling new models of working and given access to training to support this.

‘Making it Personal’ was developed in consultation with Voluntary Action Kirklees, Kirklees Council and NHS Kirklees.

***The Civic Partnership:** Kirklees was successful in securing funding from H.M. Treasury in 2007 through its Invest to Save Programme to encourage new and joined up working between the public sector and the Voluntary and Community Sector. The Civic Partnership set out to overcome barriers – such as complex processes and rules and different standards and systems which operate in different parts of the public sector – to make things better for people who access services and voluntary and community organisations. The programme came to an end in March 2010.

Evaluation methodology

A simple, post course evaluation sheet was drafted – covering participant satisfaction with the course content, the trainer, outcomes for the learner and how prepared or confident participants (and their organisations) for the introduction of personalisation. See Appendix 1 for the full evaluation sheet / questionnaire.

A short evaluation survey was also undertaken by Icarus, the independent evaluators of the Civic Partnership. This was done a short while after the programme ended. The responses and key observations are at the end section of this report.

Calendar of training courses – at a glance

Date	Course	Trainer
13 January	Improving your use of evidence and data, impact awareness and research tools	fit4funding
15 January	Business and strategic planning in a changing environment	DSC
19 January	Planning for the future – making it personal - the transition to individual budgets	ACEVO with In Control and Demos
21 January repeated 22 January	Prove your added value - capture the journey for people who access support	new economics foundation and Triangle Consulting
27 January	Budgeting and cash flow forecasting in a fast changing environment	WYCAS
28 January	Developing an enterprising Kirklees - trading models for social enterprise	SESC
2 February	Introduction to evidencing outcomes and your impact	fit4funding
3 February	Financial controls and risk management in a fast changing environment	WYCAS
8 February	Organisational change and building for the future	DSC
10 February	Working the SMART way... how to identify and use SMART measures	fit4funding
11 February	Building your unit costs in a fast changing environment	WYCAS
23 February	Costing for personalisation – the implications for your organisation	ACEVO
24 February	Developing an enterprising Kirklees - good governance for social enterprises	SESC

The training courses – key themes and outcomes

The training courses were built around 7 key themes:

1. evidencing outcomes and your impact
2. commissioning for results – not just outcomes
3. service transformation – personalisation and implications for VCO's
4. developing strong financial management
5. building your organisation's business and capacity in a changing world
6. developing an enterprising Kirklees
7. Mentoring and 1:1 support.

The themes ranged from helping improve VCO's understanding of new and emerging issues such as personalisation to developing their skills in winning new business and building confidence in managing their organisation on behalf of its members or people who access the support or services provided by them.

The programme offered an introduction to the type of areas that VCO's need to think about to ensure that systems, processes, staff and services are looking ahead to the future and confident about their capacity to respond.

Theme 1: Evidencing outcomes and your impact

The following three workshops were delivered in association with fit4funding.

fit4funding is nationally recognised as a quality provider of training on all aspects of fundraising and commissioning involving third sector organisations. It is the link between national and local in funding advice and works across the UK, although its main focus is in West Yorkshire. Originally established in 1981 as The Charities Information Bureau, it provided coordinated funding advice, training and information across West Yorkshire. As the range of services and activities expanded, the name fit4funding, was adopted in 2006. It is a registered charity and Company Limited by Guarantee with national objectives.

Establishing the evidence of need impact awareness and research methodologies

Introduction to evidencing outcomes and demonstrating the impact of your activities

Overview:

This full day training aimed to help organisations new to tendering to identify suitable outcomes for their activities, consider whether the outcomes identified meet tender requirements and develop methodologies for evidencing outcomes and impacts.

Evaluation results:

14 individuals had access to the course

Satisfaction with the various aspects of the course was as follows:

1. Course content and presentation: 91.7%
2. Trainer's knowledge and style: 100%
3. Development of learner skills and likelihood to result in changed work practice: 91.7%
4. Readiness and confidence around the introduction of personalisation: 87.5%
5. Overall satisfaction with the course: 94%

Comments about the course:

- I found the breadth of information covered really useful – knowledge of trainer brilliant. Appreciate time to look more closely at websites helpful. Couldn't have covered more.
- Useful mix and discussion around need and research methods.

Further Improvements / Areas for Support and Training:

- Looking at how to create / evaluate / monitor an evidence base / impact / outcome of services.
- Interviewing skills and videoing.

Working the SMART way ... how to identify and use SMART outcomes to track wider impact

Overview:

This training aimed to support organisations that have some experience in working on outcome based delivery. It will help develop a structured approach to identifying SMART outcomes and link to ways in which they can be monitored and impact measured.

Evaluation results:

10 individuals had access to the course

Satisfaction with the various aspects of the course was as follows:

1. Course content and presentation: 91.3%
2. Trainer's knowledge and style: 100%
3. Development of learner skills and likelihood to result in changed work practice: 78.3%
4. Readiness and confidence around the introduction of personalisation: 37.5%
5. Overall satisfaction with the course: 90%

Comments about the course:

- Very knowledgeable tutor
- I found the course very interesting ...I found the second half – based around the plans for special outcomes very interesting and useful.
- I don't think I will use the diagram shown all the time but will definitely use when I am pitching an idea or applying for a grant. The plan is great for getting you thinking about what is needed to get to your outcome.
- A great teacher – obviously very knowledgeable about the subject.
- I now know more about accounts, payrolls, how to prepare budgets (understand there's help here and separate courses)

Further Improvements / Areas for Support and Training:

- Planning for sustainability.
- Writing funding bids.
- Constitutional issues / advice.
- Event planning
- Project management
- Budgeting
- Managing volunteers
- Accounts preparation.
- Funding applications
- Bid and tender process
- Charity commission

Introduction to evidencing your outcomes and the impact of your

Overview:

This full day training will help organisations new to tendering to identify suitable outcomes for their activities, consider whether the outcomes identified meet tender requirements and develop methodologies for evidencing outcomes and impacts.

Evaluation results:

12 individuals had access to the course

Satisfaction with the various aspects of the course was as follows:

6. Course content and presentation: 79.2%
7. Trainer's knowledge and style: 72.2%
8. Development of learner skills and likelihood to result in changed work practice: 47.7%
9. Readiness and confidence around the introduction of personalisation: 31.7%
10. Overall satisfaction with the course: 66%

Comments about the course:

- I found the course interesting and informative. Was very useful to meet other groups.
- Inputs / outputs / outcomes / impact – all very useful
- Would have liked to do more work around outcomes, specifically for individual service areas as we are constantly being asked to provide evidence based paperwork.
- Need more about different methods of collecting evidence – what has worked and what hasn't.
- The information about how to make outcomes SMART was particularly useful.

Further Improvements / Areas for Support and Training:

- Training around identifying specific outcomes for organisation and how we can evidence this for things such as improvement in self-esteem and emotional wellbeing.

Theme 2: Commissioning for results – not just outcomes

The following two workshops were delivered by the new economics foundation (nef) and Triangle Consulting (developers of the outcomes star tool).

nef is an independent ‘think and do tank’ that inspires and demonstrates real economic, social and environmental well being. They are collaborating with the Civic Partnership on an ambitious case study to develop a tool for measuring and accounting for a much broader concept of value – sometimes called ‘added value’. It incorporates social, environmental and economic costs and benefits and will inform future decision making in Kirklees, providing a fuller picture of how value is created or destroyed.

Triangle Consulting helps organisations demonstrate and learn from their achievements. Triangle Consulting are outcomes experts. They pride themselves on being able to ‘measure the immeasurable’ and enable value driven organisations to count what really counts. Beyond outcomes they offer a rare mix of analytical skills and human understanding. Their approach is that when people bring both the head and the heart to bear on what seem like intractable problems, creative new solutions emerge.

Commissioning for results and introduction to the outcomes star

Overview:

The session aimed to offer an introduction to commissioning for results (not just standard reporting on outcomes). This draws on the importance of capturing the experience of people who access support.

One tool for drawing out the 'testimony' of people who access support is the use of the outcomes star. So the session will cover an introduction to the star from Triangle (what it is, how it can be used, the context for the star, its values, potential and limitations).

The session also covered the importance of co-production in commissioned services. This approach pools different kinds of knowledge and skills as people who access support and commissioners working together to design and deliver improved services:

- recognising that people have assets, not just problems
- redefining work so that unpaid activities are valued and supported
- building reciprocity and mutual exchange
- strengthening and extending social networks.

Evaluation results:

48 individuals had access to the course

Satisfaction with the various aspects of the course was as follows (presented as 21st January / 22nd January):

- 1 Course content and presentation: 68.1% / 57.7%
- 2 Trainer's knowledge and style: 98.1% / 74.6%
- 3 Development of learner skills and likelihood to result in changed work practice: 50.7% / 33.8%
- 4 Readiness and confidence around the introduction of personalisation: 47.5% / 23.9%
- 5 Overall satisfaction with the course: 72% / 55%

Comments about the course:

- The star model seems to compliment the work I do and would be easy to use in the setting of community work.
- Slight concern that the model leads to quantitative data, and we are trying to move away from statistics towards more qualitative evidence of our impact.
- Still a lot of questions unanswered about co-production and is it really equal, and any different to partnership working.
- I have found working with commissioners a great learning experience (as a service provider) it raised issues that I thought were assumptions. I valued working together with Kirklees Officers and VCS
- The programme I work on is due to end 31st March. If this was not the case I would definitely consider using the community star and use other services around the use of other stars.
- Development of the community star will be beneficial to us.
- Very clear, informative and set at a nice pace.
- Great opportunity to meet people from other services – a shame there wasn't more from the VCS
- Would be interested in sessions where there are representatives from senior management
- I found the training thought provoking and feel it will impact on my professional practice by making me think about co-producing services and service impact.

- Would be useful to look into the use of community star.
- Very good
- Overall very interesting to see what is happening and will be interesting to see if these ideas are taken on board.
- The trainers were very good facilitators of the training and engaged the audience well. I really enjoyed this day.
- Impact map will be useful when looking at our existing services.
- Outcomes star session was really useful
- It provided very good tools for assessing personal services (one to one). However I not think it is adapted for use in monitoring how different groups in society get on well together.
 - I found it particularly interesting to look at things from a broader perspective with a provider.

Further Improvements / Areas for Support and Training:

- Training more managers to implement throughout the council especially commissioning.
- I think that private providers would find this training programme really beneficial, especially the smaller ones
- More on commissioning and drawing up groups to be equally involved in the process.

Theme 3: Service transformation – personalisation and the implications for Voluntary and Community Organisations (VCO's)

The following two sessions were delivered in association with the Association of Chief Executives of Voluntary Organisations (ACEVO), In Control, Demos and Partners in Support.

The two workshops were part of ACEVO's national training programme – customised for us in Kirklees to help build a shared understanding and consensus about the emerging agenda around personalisation and service transformation.

Planning for the future – making it personal and making the transition to adjust to individual budgets.

Overview:

The Government is committed to rolling out personal budgets across all of social care and some health care by 2011. The implications for the 30,000 organisations that currently provide social care will be unprecedented. This highly practical one day workshop for third sector providers and infrastructure supports was delivered by ACEVO in partnership with Demos, In Control and Partners in Support.

Topics Covered:

The current state of play in the social and long term health care reform, market projections and predictions of how this reform is likely to affect the sector:

- the strengths and weaknesses of the sector to prepare for the change
- presentation of third sector leaders and case studies of the organisations that are making the transition
- guidance for the providers on how to set prices; engage their users; change their back office
- how to move forward with the local authority and other providers.

Evaluation results:

20 individuals had access to the course

Satisfaction with the various aspects of the course was as follows:

1. Course content and presentation: 89.7%
2. Trainer's knowledge and style: 100%
3. Development of learner skills and likelihood to result in changed work practice: 75%
4. Readiness and confidence around the introduction of personalisation: 58.3%
5. Overall satisfaction with the course: 88%

Comments about the course:

- Would have liked more examples of older person's personalisation reality.
- Would have liked someone from Kirklees Adult Services here to give 'Kirklees' perspective – as we were all from Kirklees

- Found it useful to be shown examples of forms and websites for more information.
- Very good and new information. Understand the personalisation genda a lot better – not much knowledge before.
- I found it very useful and interesting. I need to assimilate – will share with sensory impairment groups
- I hope to be able to use the information from this course to develop staff and also to inform our potential customers.
- The level of the course was very good and took into account individuals differing levels of knowledge.
- This has given me a better understanding around Personalisation as a whole.
- It has given me ideas and links to look at information on how I can work with staff teams to prepare for new ways of working with clients and the ‘powershifts’ due to personalised / individualised budgets.
- The level which I work at is more frontline with clients rather than looking at the organisational level. This training has given me a good insight into the changes ahead.
- Very well presented. I will definitely look at the websites etc that were mentioned on the course.

Further Improvements / Areas for Support and Training:

- Mostly need to consider how we develop preventative / well being work (not eligible) next to recovery / mental health need work eligible. Free service & paid for service
- More on personalisation when we are further down the process and know questions to ask. At present, we are seeing the ‘big picture’ but don’t have the answers to practical questions around payments, way of working etc.
- Managing individual budgets on behalf of individuals and what that would mean for us a charity and individual stuff.
- Costing
- User led provider development – co-operative models?

Costing for individual budgets - the implications of public service transformation and personalisation for your organisation'

Overview:

This one day session explored the challenges of personal and individual budgets in the context of full cost analysis. By ensuring your VCO's overheads and direct costs are appropriately allocated to each service, organisations will be more sustainable, and prepared for the changes individual budgets will bring to the sector.

Topics Covered:

- how to fully cost services for individual budgets
- analysis of alternative models used to deliver personal care budgets
- case studies and group based activities.

Evaluation results:

21 individuals had access to the course

Satisfaction with the various aspects of the course was as follows:

1. Course content and presentation: 65.6%
2. Trainer's knowledge and style: 87.5%
3. Development of learner skills and likelihood to result in changed work practice: 53.1%
4. Readiness and confidence around the introduction of personalisation: 50%
5. Overall satisfaction with the course: 69%

Comments about the course:

- Need simpler examples on how to set a unit price / cost.

Theme 4: Developing strong financial management

The following three sessions were delivered in association with West Yorkshire Community Accounting Service (WYCAS).

WYCAS is a small charitable company operating mainly though not exclusively in West Yorkshire. Its overall aim is to develop the ability of voluntary and community sector organisations with charitable aims to manage their money more efficiently and effectively, enabling those organisations to better attain the objectives that they were set up to achieve.

Budgeting and cash flow forecasting in a fast changing environment

Overview:

The aim of this session was to enable VCO's to understand:

- what the purpose of a budget is
- why organisations need a budget
- who should be involved in the budget process
- when the budgeting process should begin.

Evaluation results:

7 individuals had access to the course

Satisfaction with the various aspects of the course was as follows:

1. Course content and presentation: 91.7%
2. Trainer's knowledge and style: 100%
3. Development of learner skills and likelihood to result in changed work practice: 66.7%
4. Readiness and confidence around the introduction of personalisation: 91.7%
5. Overall satisfaction with the course: 86%

Comments about the course:

- Helpful to know budgets can be used as monitoring tool and how they help with costing.

Further Improvements / Areas for Support and Training:

- Financial controls and risk management.

Building your unit costs in a fast changing environment

Overview:

The aim of this session was to enable VCO's to understand:

- how to calculate the full cost of their organisations projects
- how to allocate overhead costs and on what basis
- how to assess whether their funding covers these costs
- how to calculate unit costs.

Evaluation results:

11 individuals had access to the course

Satisfaction with the various aspects of the course was as follows:

1. Course content and presentation: 96.4%
2. Trainer's knowledge and style: 95.2%
3. Development of learner skills and likelihood to result in changed work practice: 78.9%
4. Readiness and confidence around the introduction of personalisation: 70.6%
5. Overall satisfaction with the course: 90%

Comments about the course:

- I found this course very useful. Need to look further into this and implement some of what I've learnt today into our own budget.
- I would have found it more useful if we brought with us a budget for one of our own projects and applied the training to that.
- Overall I found it very useful.

Further Improvements / Areas for Support and Training:

- Quick books

<p>Financial controls and risk management in a fast changing environment</p>
<p>Suitable for: Anyone who needs to draw up financial controls for their organisation.</p>
<p>Overview: The aim of this session was to enable VCO's to understand:</p> <ul style="list-style-type: none"> • what financial rules and safeguards should be in place • why these safeguards are necessary.
<p>Evaluation results:</p> <p>9 individuals had access to the course</p> <p>Satisfaction with the various aspects of the course was as follows:</p> <ol style="list-style-type: none"> 1. Course content and presentation: 100% 2. Trainer's knowledge and style: 100% 3. Development of learner skills and likelihood to result in changed work practice: 64.3% 4. Readiness and confidence around the introduction of personalisation: 88.9% 5. Overall satisfaction with course: 88%
<p>Comments about the course:</p> <ul style="list-style-type: none"> • Very good reminders of controls – will help us when we redraft our financial procedures.
<p>Further Improvements / Areas for Support and Training:</p> <ul style="list-style-type: none"> • Could use briefings by Kirklees for finance staff / give background. • More information on finance – particularly charities and budgeting.

Theme 5: Building your organisation's business and capacity in a changing world

The following two sessions were delivered in association with Directory of Social Change (DSC).

DSC is the leading source of information and training to voluntary and community sectors worldwide. It runs over 300 courses and training events for the charity and voluntary sector throughout the UK.

The importance of business and strategic planning in a changing environment
Overview: Increasingly organisations need business plans to guide their future development and also to make the case for future funding investment. This one course aimed to introduce a business planning framework, demystify the jargon and give participants a tool kit to help them analyse their own organisation and agree how to move forward.
Course content included: <ul style="list-style-type: none">• what do we mean by strategy• developing a process and framework• putting the plan together – tools and techniques• developing a strategy• costing the plan• developing a future income model• making it happen – keeping the plan alive.
Evaluation results: 7 individuals had access to the course Satisfaction with the various aspects of the course was as follows: <ol style="list-style-type: none">1. Course content and presentation: 91.7%2. Trainer's knowledge and style: 100%3. Development of learner skills and likelihood to result in changed work practice: 91.7%4. Readiness and confidence around the introduction of personalisation: 87.5%5. Overall satisfaction with the course: 94.5%
<i>Unfortunately no additional comments are available from this course</i>

<p>Organisational change and how to prepare for change and uncertainty</p>
<p>Overview: Voluntary organisations operate in constantly changing times. This practical course looked at the kind of change voluntary organisations face and introduced a range of tools and techniques that managers can use to identify, plan for and manage change. The course also identified some of the key challenges and trends facing voluntary organisations and suggested how they can best be managed.</p>
<p>Course content included:</p> <ul style="list-style-type: none"> • identifying different types of change at work • planning ahead – strategic management • overcoming common blocks and barriers to change • supporting people through change • building strong and flexible organisations.
<p>Evaluation results:</p> <p>9 individuals had access to the course</p> <p>Satisfaction with the various aspects of the course was as follows:</p> <ol style="list-style-type: none"> 1. Course content and presentation: 95.8% 2. Trainer’s knowledge and style: 100% 3. Development of learner skills and likelihood to result in changed work practice: 75% 4. Readiness and confidence around the introduction of personalisation: 18.2% 5. Overall satisfaction with the course: 90%
<p>Comments about the course:</p> <ul style="list-style-type: none"> • Builds confidence towards new approaches. Very useful. • Useful and enjoyable. Might have been good to allow short session at the end to get us to apply the tools discussed to our own circumstances. • I found the change grid particularly helpful and will use this as a mental model in the future. • I would have liked more detail about the 7 ‘S’ model and how this can be implemented. • Interesting and enjoyable. Given me the knowledge and tools to take back to my workplace
<p>Further Improvements / Areas for Support and Training:</p> <ul style="list-style-type: none"> • More on personalisation when we are further down the process and know questions to ask. At present, we are seeing the ‘big picture’ but don’t have the answers to practical questions around payments, way of working etc. • More leaning opportunities around innovation within the 3rd sector would be useful.

Theme 6: Developing an enterprising Kirklees

The following two sessions were delivered in association with the Social Enterprise Support Centre (SESC).

SESC is a small, dynamic organisation delivering support services to the social enterprise sector through its networks, events, communications, workshops and consultancy.

SESC specialise in providing support in: business planning and strategic development, market development, tendering for contracts, marketing, sales and branding and SROI (SESC is the home of Selling Added Value).

Not all social enterprises are interested in contributing to public service delivery, either because their particular service isn't appropriate, or because they do not want to grow beyond an optimum size for their customers.

Trading models for social enterprise

Overview:

What should an organisation look like if it is changing the way its money is made? This course offered an opportunity to learn for the first time or reinforce previously introduced ideas around business planning and trading models for a social enterprise. This workshop covered all aspects of new trading models in a supportive classroom type environment.

Evaluation results:

6 individuals had access to the course

Satisfaction with the various aspects of the course was as follows:

1. Course content and presentation: 100%
2. Trainer's knowledge and style: 100%
3. Development of learner skills and likelihood to result in changed work practice: 25%
4. Readiness and confidence around the introduction of personalisation: 0%
5. Overall satisfaction with the course: 53.3%

Unfortunately no additional comments are available from this course

The Good Governance Guide for social enterprises

Overview:

The workshop took an overview of governance requirements for social enterprises. It looked at skills auditing across the organisation's Board for a healthy mix of abilities. It explored optimum models for managing the business: sales, contracting, mixed income. Choosing the appropriate legal structures and governance models is a major part of establishing a social enterprise. This half day workshop provided a basic understanding of the legal forms available to social enterprises. It helped participants think about the key issues they need to cover when setting the rules and regulations and the legal structure that will govern the way they operate the business.

Evaluation results:

8 individuals had access to the course

Satisfaction with the various aspects of the course was as follows:

1. Course content and presentation: 100%
2. Trainer's knowledge and style: 100%
3. Development of learner skills and likelihood to result in changed work practice: 62.5%
4. Readiness and confidence around the introduction of personalisation: 14.3%
5. Overall satisfaction with the course: 87.5%

Comments about the course:

- I think I have learned useful stuff about social enterprise and different structures.
- The course was both useful and helpful.

Further Improvements / Areas for Support and Training:

- SROI and impact mapping.

Theme 7: Mentoring and 1:1 support

As well as the published programme, the Civic Partnership offered participants on the programme the opportunity to access mentoring and 1:1 support, tailored to fit their organisation's requirements and delivered where and when they needed it most. Two options were available and were to be provided by fit4funding and WYCAS.

Option 1: fit4funding (20 mentoring opportunities have been provided):

Questions VCO's needed to think about before access the support were:

- Have they researched the need for the service they offer?
- Are there aspects of their organisation that they feel will let them down when they come to completing tenders?
- Is the information they provide on the local authority's electronic procurement website ensuring they receive the correct notifications?
- Does their business plan let them down?
- Are their project management skills up to standard?
- Do they need support in developing monitoring and evaluation strategies?
- Are they thinking about working with a partner but not sure where to start?

Option 2: WYCAS (20 mentoring opportunities have been provided)

WYCAS are providing support and training for key finance staff and treasurers of voluntary and community organisations in Kirklees on a 1 to 1 basis at their own premises, in the following areas of financial management.

Questions VCO's needed to think about before access the support were:

Financial planning

Looking ahead and planning how organisations raise and spend its money is crucial to the viability of organisations. WYCAS are giving support and training in the following areas:

1. producing a budget for the organisation
2. costing a funding bid or a business plan
3. cash flow forecasting
4. full cost recovery.

Book keeping

Are VCO's book keeping systems as efficient and detailed as they should be, so that they can pull out all the information that they need? WYCAS will have provided support and training in how to set up and maintain good book keeping systems. WYCAS will also have helped VCO's to assess whether they should computerise their accounts; and then can work with VCO's to set up a computerised accounting system and train them in how to use it.

Internal Financial Procedures and Controls

Financial procedures and controls are the financial rules of the organisation; having a set of rules which are implemented enables staff, management committees, funders and other stakeholders to feel that they can have confidence in the organisation, and that its financial management is sound. WYCAS will have assisted VCI's with devising a set of rules appropriate for their organisation and then supported them in implementing them.

Finance Reports for the Committee

The committee is ultimately responsible for the management of the organisation. In order to make sound decisions they need financial information set out in a way that is understandable. WYCAS will have provided VCO's with models for doing this, and training in how to use them.

Evaluation from the mentoring sessions is not currently available.

Inputs and costs

A budget of £19,200 was available for the Making it Personal training programme. Closing figures on the final expenditure are not yet available as final invoices are still being processed.

All courses were free to participants to encourage and optimise attendance.

Lunch was provided for full day courses and light refreshments for half-day courses.

Significant administrative support was provided by Voluntary Action Kirklees who also carried out the analysis and evaluation of the programme.

Marketing and communications support was provided at no cost by Kirklees Council Adult Services.

Overall outcomes and impact

179 individuals had access to courses on the programme. They were drawn from 42 organisations – predominantly from the voluntary and community sector. Places were open to the public sector for the sessions with the new economics foundation and Triangle on 21st and 22nd January.

Satisfaction with the various aspects of the whole programme was as follows:

1. Course content and presentation: 80%
2. Trainer's knowledge and style: 91.1%
3. Development of learner skills and likelihood to result in changed work practice: 58.2%
4. Readiness and confidence around the introduction of personalisation: 44.6%
5. Overall satisfaction with the course: 76%

Personalisation questions:

The overall programme was particularly interested in finding out how prepared or how confident participants from the third sector in Kirklees are around service transformation and the introduction of personalisation. So there was a dedicated section on each evaluation sheet asking for their response to 4 simple statements to try and gauge participant's views on this issue.

Set out below are the 4 x statements asked and the responses from all participants completing this section. Again – people were asked to consider how strongly they rated the series of statements:

1. My organisation is well informed about the likely impact of personalisation: 50%
2. We are planning how to market our services to individual customers: 44.7%
3. We are considering how to price our services in the context of personal budgets: 56.5%
4. We are ready to face the challenges posed by personalisation: 36%

In terms of the feedback from the evaluation of the programme carried out by Icarus.

21 responses were submitted. These responses allow the following observations:

- the timing of the work, at the end of the Civic Partnership programme, seems to have been opportune, as it has allowed a high degree of relevance to current issues. Take up of the programme has been good as a result.
- of those who responded to the questionnaire, the majority has attended courses linked to the evidencing of impact
- a small number of organisations took up an offer made of follow up support from West Yorkshire Community Accounting Service and Fit4funding
- all who responded indicated that they had shared learning from the courses with colleagues
- confidence in applying the learning from the training seemed moderate.

Conclusions and next steps

The ‘Making it Personal’ programme is generally considered to have been a success for all who were involved – from the perspective of both participants, providers and those with on-going responsibility for training and capacity building of the third sector in Kirklees.

Responses to the evaluation and its analysis have been circulated to lead officers for VCS capacity building within the Council and to Voluntary Action Kirklees who implement their own annual training programme.

There are lessons learned on the different approach taken to marketing the programme, its themed content focussing on the building blocks needed to build the resilience of the VCS in the light of service transformation – and the potential gaps in existing programmes, as identified by participants in their requests for future training.

In terms of future capacity building of the third sector around the specific issue of personalisation – Kirklees is taking a regional lead on this issue as part of the Yorkshire & Humber Regional Joint Improvement Programme. As a result, the ‘Making it Personal’ programme has given invaluable insight into the challenges and opportunities posed by personalisation. The programme has also resulted in Kirklees establishing a useful network and reference group for future consultation and communications around personalisation between commissioners and providers.

Acknowledgements

'Making it Personal' was a very ambitious programme which couldn't have been delivered (as successfully as it was) without the help of the following.

A special acknowledgement goes to Michelle Richardson at Voluntary Action Kirklees who took a critical role in administering the whole programme from conception to evaluation.

Other thanks go to:

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Alison Wolfenden at WYCAS

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Erin McFeely and the team at ACEVO, Leeds

Jamie Bartlett at Demos and colleagues from In-Control and Partners in Support

Paula Dennison at the Social Enterprise Support Centre

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Bayano and the team at the National Children's Centre, Brian Jackson House

Making it Personal – Training Course Evaluation

Name of course:	
Date:	Trainer name:
Your name (optional):	

We welcome your comments about the courses on the 'Making it Personal' programme. The information you give us is very important. It will help inform and improve the quality and range of future training and development opportunities in Kirklees to build VCS capacity to respond to changes that will come with public services transformation and personalisation.

Please tell us how satisfied you were with the following aspects of the programme and give a rating between 1- 5. The last section explores how prepared your organisation is for the future 'personalisation' of public services. It asks you to rate a series of statements as follows:

1-Disagree Strongly	2-Disagree	3-No Strong Feeling	4-Agree	5-Agree Strongly
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Please tick the appropriate boxes below:-

		1	2	3	4	5
COURSE	The course was presented clearly & in sufficient depth					
	There was a good balance between listening and participating					
	I found the course programme interesting & informative					
	I thought the course met it's intended objectives/outcomes					
TRAINER	The trainer had a good knowledge of the subject					
	The trainer was able to respond to questions well					
	The trainer had a strong enthusiasm for the subject					
LEARNER	I have gained new knowledge & skills					
	I feel confident of being able to apply what I have learnt					
	I will make changes to my working practice as a result of training					
	The training is likely to have a wider impact on my whole organisation (e.g. it will lead to changes in organisational procedures and practice)					
PERSONALISATION	My organisation is well informed about the likely impact of personalisation					
	We are planning how to market our services to individual customers					
	We are considering how to price our services in the context of personal budgets					
	We are ready to face the challenges posed by personalisation					

We welcome any further comments you have about this course, including what you found particularly useful and what you would have liked to have known more about.

We would particularly like to know of any areas for training / support that would help your organisation to develop.