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Stakeholders views on the objectives of the Third Sector Partnership Agreement and of the performance monitoring of the third sector infrastructure. Report of findings



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Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

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**Stakeholders views on the objectives of the Third Sector Partnership Agreement and of the performance monitoring of the third sector infrastructure.
Report of findings**

1. Introduction & Objectives

The Third Sector Partnership Agreement provides funding of £5,515,792 (2012/13) from the Welsh Government to the Wales Council for Voluntary Action (WCVA). The purpose of this funding is to allow the WCVA, County Voluntary Councils (CVCs) and volunteer centres to achieve Welsh Government objectives to support the third sector and volunteering in Wales.

The current Partnership Agreement expires in March 2013 and in order to inform developments after this time, a review of the current partnership arrangements was required.

The focus of the review was to provide:

- an assessment of the original purposes of the grant outlined in section 11 of the terms of contract to see whether they need updating;
- an appraisal of the current monitoring;

The review was conducted by a Senior Research Officer from the Welsh Government's Knowledge and Analytical Services. The review is of a qualitative nature. It includes the views of similar infrastructure organisations elsewhere in the UK, organisations in direct receipt of partnership agreement funding and a small number of organisations not in receipt of funding. The findings by their very nature are qualitative and give an insight to potential changes the Welsh government might wish to make.

A review of Welsh Government funding arrangements with WCVA has also been conducted but it is important to note that review is entirely separate from this piece of work, which focuses only on gathering stakeholders views on the relevance of the objectives of the Third Sector Partnership Agreement and on the performance monitoring of the third sector infrastructure.

2. Methodology

Given the timing and resources available, a full scale evaluation of the partnership agreement was not possible. A series of qualitative, semi-structured interviews were conducted with key stakeholders from the third sector as follows:

- 4 overarching organisations in Wales and the UK
- 4 organisations that receive funding from the WCVA
- 4 organisations that DO NOT receive funding from the WCVA
- 5 CVC's

Interviews were conducted by telephone mainly, with two conducted face to face. Interviews lasted between 30-60 minutes and were recorded for analysis purposes. The researcher used a discussion guide as a prompt for the interviews (see annexe B). Prior to the interviews, interviewees were sent two pre-tasks to assist with the discussion (see annexe C).

3. Main Findings

3.1 Views of the Partnership Agreement

The Third Sector Partnership Agreement is considered by stakeholders to be a useful means of identifying and defining the different roles of each level of the third sector infrastructure. By defining the roles for each level, it also recognises which level is more appropriate for the delivery of core services as identified in the partnership agreement. It also contributes to a perceived increase in effectiveness of the sector as unnecessary duplication of services and products are avoided.

While there was a strong consensus in the value of the partnership agreement, the stakeholders who took part in the interviews were able to offer some suggestions for amendments or additions to a new partnership agreement.

A clearer definition of the third sector and how it works together was identified as one area that could be included. There are a number of overarching organisations in Wales e.g. WCVA, Children in Wales, Disability Wales which sometimes leads to the sector having a 'multiple voice'. They therefore felt that more clarity on the scope of the 'third sector infrastructure' was required by acknowledging more clearly the breadth and diversity of the sector and how the different organisations fit and work together. Organisations outside of the infrastructure appear to be confused about where the boundaries lie between the different overarching organisations.¹

Many of the CVCs interviewed felt that a greater acknowledgement of the regional agenda was required in the new partnership agreement. They are increasingly working at a regional level and the partnership agreement should reflect that.

Other areas that stakeholders felt should be included in the partnership agreement were:

- An acknowledgement of the pressure on resources to deliver on the objectives and core services identified in the partnership agreement and that realistic expectations of what can be delivered should be factored into the agreement.
- To include a provision for partnerships: that organisations are encouraged to work in partnership with each other and that the CVCs and WCVA have an important role in facilitating partnership working.²
- Assisting work with the private sector especially in the area of developing social enterprises.

3.2 Relevance of Partnership Agreement Objectives

Stakeholders were asked to provide feedback on the objectives of the partnership agreement and to consider if they were felt to be still relevant to the sector and fit for purpose. Details of their response to each objective are noted below.

¹ The third sector partnership Council provides a vehicle for the overarching organisations to speak collectively on issues of strategic importance. From the limited sample there would appear to be scope for greater awareness of the role of the individual members of the third sector partnership Council. The election of new officers to the Council commenced in May of this year and thus there is an opportunity for newly selected members to raise their profile both individually and collectively through the WCVA. The current partnership agreement requires members to consult with their sector- this requirement is reinforced by the review.

² The existing partnership agreement outlines roles and responsibilities of the WCVA, CVCs and volunteer centres in the service specifications. This finding would suggest that the current objective "to assist third sector providers to adopt collaborative approaches to bidding to deliver services" should be widened to read as "to assist third sector providers to adopt collaborative approach wherever appropriate".

Reassuringly, the majority of the objectives were considered very relevant to the aims of the sector, with only minor amends suggested.

3.2.1 Role of the WCVA

Supporting and promoting the work of voluntary and community groups at national, regional and local level

All stakeholders interviewed considered this objective to be very relevant and was seen as a vital part of the role of the WCVA. To have an overarching organisation that worked at a national level and had access to ministers and government officials was extremely valuable to the profile of the sector.

That's an important role. It's sometimes difficult for third sector organisations to have the resources to promote themselves to organisations of different levels. Where there's a generic or third sector perspective it's very helpful that the WCVA can coordinate that and provide that point of view. (Overarching organisation)

CVCs representatives noted the increasing amount of work being conducted by them at a regional level and felt this could be acknowledged in the new Partnership Agreement. They also felt that the reference to the local level of this objective was their role and not that of the WCVA so suggested that it be removed.

Interpreting and articulating the views and concerns of the voluntary sector

This was a key role for the WCVA to fulfil in the opinion of all stakeholders and generally they considered that it did this well. It was acknowledged that it is difficult to represent the views of the whole sector, but that it was important to have an overarching organisation that could take a Wales-wide perspective of the needs of the sector and represent these to the Welsh Government.

That is fundamental. It's not an easy role; the views of the third sector are many and varied, but the WCVA do a good job of interpreting those views. (Overarching organisation)

That's still a vital role of the WCVA as they get the national picture. I might well have a view about the concerns of the voluntary sector in (LA named), but then you need to draw together the Wales wide picture. cvc

Questions about the independence of the WCVA were raised by some stakeholders as they noted the difficult position the WCVA was in if it was criticising the very government which provided funding for it. The independence of the WCVA should therefore be emphasised in the partnership agreement.

.....articulating the views and concerns of the third sector while being funded by the Welsh Government is a difficult role to hold.....how easily can they articulate the views of the concerns of the voluntary sector to them? It's still a relevant objective but there needs to be recognition in the agreement that there has to be a level of appreciable independence and transparency by the WCVA so that they are not basically a propaganda arm of the WG. (Organisation who receive funding from the WCVA)

Supporting and promoting volunteering and the interest of volunteers

It was felt that aspects of this objective were more relevant at a local rather than a national level. Respondents acknowledged the vital role played by volunteers and the reliance of the sector on them. Promoting this on a national level was thought to be important, but the relevance of supporting volunteers was felt to be more appropriate at a local level. Similarly, the interests of volunteers were felt to be more

appropriate for local organisations by some stakeholders. An alternative wording suggested for this objective was 'Promoting and advocating volunteering'

...support happens at a more local level. (Organisation who receive funding)

Promoting community cohesion and inclusion, and building social capital

There were fewer consensuses on this objective across the stakeholders interviewed. Some felt it was very relevant, while others felt that in practice, this happened more at a local than a national level and that the partnership agreement should reflect this. On balance however, the objective was still considered relevant and it was considered important that these are advocated on a national level. One could consider this objective to be an outcome however. It was noted that *'without the third sector you wouldn't get these three things'* (overarching organisation) and that *'these are the results of the other objectives being met'* (overarching organisation).

Developing and supporting new initiatives, particularly with regard to the priorities identified in *Civil Society, Civil Space*

Development and support of new initiatives was considered very relevant by almost all stakeholders.

'Developing and supporting new initiatives? Absolutely. There is a need for the third sector to be diverse, including a varied range of organisations. We can work together better and in new ways and those ways can only be developed by those who have a wider view of the sector. It's spot on. It's how the sector can survive.'
(Organisation who receive funding from WCVA)

The reference to Civil Society, Civil Space was felt to be less relevant however, with many stakeholders admitting to not being familiar with it.

Maintaining and improving performance and effectiveness

This objective was considered absolutely vital and would be an objective for any organisation. More clarity around whose performance and effectiveness could be included however, as well as an acknowledgement of the role the WCVA could play in assisting other organisations to achieve this objective.

3.2.2 Role of CVCs

Providing support services for local organisation (information services, funding advice, practical services, training services, organisational advice)

All stakeholders who felt able to give an opinion on the role of CVCs believed that this was a crucial role for them to play, especially in providing these services to small, local organisations who wouldn't have the infrastructure or the resource to do these themselves. It was suggested that some of the examples could be updated to reflect the increasing demand for advice on procurement and commissioning.

Some overarching organisations noted an inconsistency in the perceived quality and level of support from CVCs to local organisations, suggesting that clearer information about the nature of the support to be provided would create an equal playing field across Wales for the smaller organisations:

We have noticed that the range of support varies, some (CVCs) will write the report for them (local voluntary organisations); others will just provide advice and point them to the relevant websites. What does it mean? How far does it go? It's interpreted and delivered in different ways by different CVCs. (Overarching organisation)

Identifying common concerns and interests

This objective was considered very relevant and an important role for the CVCs to fulfil. Once again, the regional aspect of the CVC role was noted in relation to this objective and how important it is for CVCs to work together to identify common themes across regions as well as within their own local authority areas.

Representing the local sector and its concerns to others

This was considered to be a valuable role that the CVCs play, though the challenges of representing the views of such a diverse sector were noted (as for the similar objectives for the WCVA – interpreting and articulating the views of the third sector). Some therefore suggested that the same objective could be used for CVCs but at a regional/local level. It seems that CVCs are increasingly encouraging members to represent the local sector on certain committees / bodies as their own resources are increasingly stretched.

This area is very much underplayed and should be more prominent. It is our role to get representatives that do actually represent the sector, that they have training, understand what their role is and that they're not going there to represent their own organisation. They then have the opportunity to feedback from the meetings, gather views on particular issues that come up. People perhaps don't realise how much work we put into representing the sector. (CVC)

Establishing and maintaining formal links between the voluntary sector, the local authority, the NHS and other bodies

This was seen as an increasingly important role for the CVCs to fulfil, especially with the changes that have taken place in recent years and the growing reliance on the third sector to be delivering key services to the public. It was suggested by one respondent that 'improving formal links' be added to the objective. While this was considered a vital role for the CVCs, the pressure it puts on their resources and the limitations of what they can achieve was noted by some stakeholders and that this needs to be acknowledged.

They don't always have resources to represent on all of the statutory groups. Their lack of capacity limits their ability to truly represent and implement stuff for the third sector. There needs to be a reality check on what is possible to ensure we're not living in a dream world thinking that a small CVC is truly able to act in equal partnership with the LHB (Local Health Board) who have 200 people who can help them. It is a role (for CVCs), but we need to be aware of the limitations around it. We perceive it as an issue. (Overarching organisation)

It's about the communication of the concerns identified and vice versa. You can't go up against the LA on your own. Maintaining formal links but also balancing out the knowledge and power gap between the two. (Organisation who receive funding from the WCVA)

Helping to establish new voluntary sector services and initiatives

As with the previous objectives, this was considered to be a vital role for the CVCs to play. To be able to support organisations as they set up new initiatives is a valuable

service, as is their ability to get an overview of the sector and to be able to identify gaps and avoid duplication of effort. Comments were made that encouraging partnerships and collaborative working need to be included in the Partnership Agreement as the demands for these increase.

Yes, but not exclusively. I think in this day and age they need to take a look at that. Include something about helping to encourage joint service delivery not just voluntary sector. The climate now is very much more about helping the sector work with others. Collaborative new services developed, not just third sector but something jointly delivered. (CVC)

I would definitely include partnerships in there. Establishing new sector services will depend on funding. Partnerships can come under initiatives but I think partnerships deserve to come into this on their own. Only through local knowledge and somebody having the umbrella aspect to the local environment can they advise on pooling resources, expertise etc. A person within the CVC who can build partnerships and build services would be very useful. (Organisation who receive funding from the WCVA)

Meeting organisational standards

While acknowledging that having and meeting standards are important, it was felt that this objective was not clear enough. Questions were asked about whether it meant having appropriate organisational policies in place or whether it related to performance. It was also unclear whether this related to the CVCs themselves or to the organisations they supported. Greater clarity is therefore needed around this objective.

3.2.3 Role of Volunteer Centres

Supporting the development of and promoting a range of good quality volunteering opportunities

This was considered a very relevant and important objective for the volunteer centres and they were generally felt to do this well. The importance of them being 'good quality' volunteering opportunities was emphasised. Some CVCs noted that they would like to do more of this, but that resources were lacking to do as much as they would like and also that the demand for volunteering opportunities was currently outstripping supply.

Providing volunteer-centred services which are available equally to everyone

Respondents identified this as another relevant and important objective for volunteer centres, though some noted challenges around it, especially in large rural areas and for people with disabilities where access to opportunities maybe limited. It was therefore suggested by some respondents that 'accessibility' of volunteering opportunities needs to be factored into this objective.

Providing services that are efficient, informative and helpful

This was considered to be an obvious objective by all.

Developing and maintaining standards of good practice

This was considered an important objective to maintain standards across the third sector and also to provide relevant and good quality volunteering opportunities for

people. Some felt that this was a CVC role and noted issues around sharing good practice with other organisations who they could be competing against to provide services locally.

Monitoring and carrying out an annual review of their services.

This final objective was considered important to maintain standards across the sector. Some noted that quarterly reviews are also conducted.

3.3 Views on delivery of core services³

Respondents were asked to consider the importance and effectiveness of delivery of nine core services delivered by the third sector infrastructure.

Reassuringly, the core services identified were all considered important and generally felt to be delivered effectively. This demonstrates that the third sector infrastructure is delivering services in the areas required by the sector and that it is doing this well overall.

Identify changing needs of the sector

This was widely considered to be an important part of the infrastructure's role as these can be identified locally via the Volunteer Centres and CVCs and then nationally by the WCVA. It is considered by CVCs to be 'something that we just do'. Without understanding the needs of the sector, the CVCs and WCVA would be ineffectual as representative organisations, but they are generally believed to be doing this well.

It is also worth noting that those changing needs may not necessarily be driven from within the sector itself. External factors will change the needs of the sector too e.g. the increasing use of procurement and tendering for contracts to deliver key local services means that the sector must respond to this change which impacts on the nature of advice and support required by organisations from within the infrastructure.

Information services (including disseminating information)

Information services were considered to be a vital service provided by the infrastructure, especially to smaller organisations and volunteers themselves. Overall, the infrastructure appears to provide good quality information services to its members. Nevertheless, some areas for improvement were noted: streamlining the information provided so members get the most relevant information for them; clearer signposting on newsletters so that members can more easily identify the information that is most relevant to them; the format of newsletters has not changed in years; and make better use of modern communications technology. The high levels of demand and lack of resources was felt to impact on the effectiveness of this core service.

³ Stakeholders were asked to score the nine core services provided by the third sector infrastructure in terms of importance and effectiveness of delivery, where 1 was not very important or not delivered effectively and 10 was very important and delivered very effectively. Scores for importance tended to be higher, with respondents often reluctant to give 10 for effectiveness of delivery as they believed there is always scope for improvement. The purpose of this exercise was to identify what the infrastructures priorities should be and any areas that may require improvement. It should also be noted that the scores were used to prompt discussion and given the small sample used for the qualitative research, they are not statistically robust so have not been included in this report.

Respond to consultations

Responding to consultations was generally considered to be of lower importance than the other services provided by the infrastructure. The subject matter of the consultation would have a considerable impact on the importance of the sector responding however as one stakeholder noted *'Sometimes it will be a 10 (i.e. very important) other times it will be less important. It depends what the consultation is.'* (Organisation that do not receive funding from WCVA).

Questions were raised about how representative of the sectors views a response from CVCs or the WCVA would be as some organisations are more likely and able to respond:

The danger with that is that you get the usual suspects. They will respond with the WCVA and that may not be the view of the third sector, and that sector is so disparate. It's difficult to reflect views of them all. (Overarching organisation)

Challenges around responding due to a lack of resource, especially for CVCs, were also noted:

There's a difference with what we can do locally and nationally. WCVA have fantastic resources available to them to do this. We often support the WCVA response if it reflects our view. We could do better locally on effectiveness of delivery. We need to articulate more what individual organisations responses are, not just representing the sector. We don't have enough resources to do it as well as we would like to. (CVC)

Another issue raised about consultations was the lack of feedback provided to responses and the perception that responses have little impact on the policy development and implementation process. This was the reason given by one overarching organisation for not responding to consultations any more.

Represent views of the sector

Most stakeholders considered this to be the most important role for the third sector infrastructure to fulfil.

Stakeholders identified the challenges of representing the views of such a diverse sector from within the infrastructure itself however, and also recognised that there are other overarching organisations within the third sector in Wales e.g. Children in Wales and Disability Wales which could lead to some duplication or a multiple number of views across the sector being represented to government.

The independence of the WCVA to represent the views of the sector, while receiving funding from the Welsh Government, was also noted as a potential challenge in delivering this core service.

The sector is so huge and diverse. I'm sure they try very hard to do it, but it's difficult. It is essential the sector has a voice. There are quite a few voices though and whether they are saying the same thing I don't know. Someone has to make sure that the sector, which has a very important role in society in Wales, has a voice in government. And I think they do it quite effectively within the confines we've discussed. (Overarching organisation)

The challenge of representing the views of their members was noted by the CVCs, many of whom expressed a desire and a belief that they needed to do more on this, but that time and resources often hindered how effectively they could deliver this key service.

I think that's really important. I wish we had more resources to put into being on every single group that needs to have someone there. Because there are so many opportunities at the moment we have to think about which ones to go to. CVC

We could do more. Because of the way we're structured and are membership organisation. Maybe we don't use that resource enough - there are 600 members so maybe we could make better use of networks. CVC

Training (including identifying training needs, providing training and training services)

There were mixed views on the importance of delivering training by the third sector infrastructure. For some it was considered very important, but others felt that it wasn't as important as other core services that needed to be delivered. Overall the quality of the training was considered to be very good.

It was suggested that CVCs could work together more effectively at a regional level to identify training needs of the sector.

Volunteering (including recruitment, sharing best practice)

This core service was considered to be very important and delivered very effectively, with comments about how volunteering 'is at the heart' of the sector. CVCs again called for more resources to be able to support volunteering more effectively.

Providing advice to the sector (e.g. funding advice, organisational advice)

Providing advice to the sector was considered to be the core business of the CVCs and the WCVA, and most felt that they did this very well:

'They excel at that'. (Organisation who receive funding from the WCVA)

There were mixed reviews of funding advice; one organisation that doesn't receive funding from the WCVA reported having very good funding advice, however a couple of organisations who do receive funding, noted some issues with the advice provided:

It's important but the advice tends to be very generic. Their funding advice is very general. (Organisation who receive funding from the WCVA)

It's not delivered brilliantly, especially around funding advice. If you're a very specific sort of organisation, they're very geared up for that, but for organisations like ourselves with a large turnover and a lot of contract based income who want to diversify, they've not been as effective. It works well for some organisations though. (Organisation who receive funding from the WCVA)

Providing support to the sector (e.g. trustee support)

Providing support to the sector was considered a vital core service and one that the infrastructure generally delivered to a high standard.

Joint working with the public sector

Working with the public sector was widely considered to be growing in importance. The current economic situation, the increasing expectation that the third sector will deliver public services and the regional agenda in Wales, mean that it is absolutely vital for the sector to work effectively with the public sector. Many respondents noted that the sector has responded effectively to this change in emphasis in recent years and that many links with the public sector have already been forged and are working well.

That's really really important. It's tough in the current economic climate but it remains vital in keeping the third sector on the agenda and making sure the sorts of solutions we can offer as a sector are kept high in people's mind. It's even more important in the current climate and it's done well. (Organisation who do not receive funding)

4. Monitoring Performance

4.1 Outputs vs. Outcomes

Over the period of the existing partnership agreement there has been a reduction in the number of key performance indicators collected and the overall consensus among those involved is that this trend should continue.

Much of what is contained in the report are a collection of outputs – how many hits to websites, how many enquiries received, how many training courses run and how many newsletters distributed etc. While there is value in some outputs, as the sector does need to be aware of the scale of its work, almost all stakeholders welcomed the move towards more outcome based performance monitoring. It should be noted that the WCVA have begun to develop a Results Based Accountability (RBA) approach, as have many of the stakeholders who took part in the research.

All stakeholders noted that introducing outcome based performance indicators would be a challenge on a number of fronts: identifying appropriate indicators, ensuring those reporting on them understood them, changing the way people work and collect data that is outcome focused, issues around attribution and causality and capturing the relevant information.

Its quantity and not quality at the moment. We've got to do more about the quality issue. We're introducing RBA and hopefully that will work, but it's going to take a big shift for staff to get used to doing this. I think that's the way we need to go though, but it needs to be developed properly. (CVC)

All of our stuff is moving towards outcomes. Reporting on outcomes is marvellous as long as people understand what it means. Will be a long time before everyone is literate enough to know what outcomes do, and that we abandon old reporting styles too. It's a much better way of doing it..... For outcomes to be effective, they need to be very short and very clear and contain as very little scope for interpretation as possible. (Organisation who receive funding from the WCVA)

Many of the overarching organisations are moving towards outcome based performance indicators and some examples of the work they do around this include:

- Customer satisfaction surveys

- Internal audits on performance of individual member organisations e.g. organisational effectiveness and quality of advice provided etc.
- Independent evaluations of projects

Suggestions for aspects of the infrastructure that could be monitored are:

- How many partnerships have been created?
- Feedback from volunteers on their experience.
- Retention of volunteers
- Number of volunteers who have found employment
- How have organisations grown / developed as a result of support from the infrastructure

5. Summary and Recommendations

The third sector partnership agreement is considered a useful means of identifying and defining the different roles across the different levels of third sector infrastructure in Wales and at what is the most appropriate level for different responsibilities.

Overall, the objectives in the current partnership were felt to still be relevant and fit for purpose by stakeholders. Minor amendments were suggested to some specific objectives as has been identified in the main section of this report.

More general amendments suggested include:

- a greater acknowledgement of the regional aspect to the work of CVCs
- more information on how the different aspects of the infrastructure work together

The core services delivered as part of the third sector partnership agreement were all considered important and generally well delivered. Priorities for the infrastructure appear to be focused on ensuring that they more effectively represent the views of the sector and provide information, advice and support to the sector.

The outcome based performance indicators for the partnership agreement need to focus on organisational or process performance rather than the impact of the services and support provided to the public.

The introduction of outcome based performance indicators for the third sector infrastructure needs to be managed carefully. Indicators need to be developed in consultation with the sector to ensure they are appropriate, proportionate and relevant. The Welsh Government should work closely with the WCVA and CVCs in developing meaningful indicators.

The indicators should be reviewed after an agreed period of time to assess their relevance and the practicalities of collecting the relevant data.

Annexe A

Summary of objectives and suggested changes

| WCVA Objectives | Suggested changes |
|---|---|
| Supporting and promoting the work of voluntary and community groups at national, regional and local level; | Remove reference to local as this is done by the CVCs. |
| Interpreting and articulating the views and concerns of the voluntary sector; | No changes suggested. |
| Supporting and promoting volunteering and the interest of volunteers; | Promoting and advocating volunteering and the interest of volunteers. |
| Promoting community cohesion and inclusion, and building social capital; | No changes suggested. |
| Developing and supporting new initiatives, particularly with regard to the priorities identified in <i>Civil Society, Civil Space</i> ; | Remove reference to Civil Society, Civil Space. |
| Maintaining and improving performance and effectiveness. | Needs to make it clearer whose performance this objective refers to. |

| CVC objectives | |
|---|--|
| Providing support services for local organisation (information services, funding advice, practical services, training services, organisational advice); | Amend some of the examples to reflect increasing demand for advice on procurement and commissioning. |
| Identifying common concerns and interests; | No changes suggested. |
| Representing the local sector and its concerns to others; | Consider using same objective as for WCVA: Interpreting and articulating the views and concerns of the local voluntary sector. |
| Establishing and maintaining formal links between the voluntary sector, the local authority, the NHS and other bodies; | Consider including 'improving formal links' as many have been established by now. |
| Helping to establish new voluntary sector services and initiatives; | Consider including 'encouraging partnerships and collaborative working'. |
| Meeting organisational standards. | Needs clarification about whom and what it is referring to. |

| | |
|--|---|
| Volunteer Centres objectives | |
| Supporting the development of and promoting a range of good quality volunteering opportunities | No changes suggested. |
| Providing volunteer-centred services which are available equally to everyone | Include 'accessibility of volunteering opportunities' |
| Providing services that are efficient, informative and helpful | No changes suggested. |
| Developing and maintaining standards of good practice | No changes suggested. |
| Monitoring and carrying out an annual review of their services. | No changes suggested. |

Annexe B Interview Guide

Third Sector Partnership Agreement Review Stakeholder interviews – Discussion Guide

Introduction (5 mins)

Introduce self and research – purpose is to get their views on the Third sector Partnership Agreement of the Welsh Government. Explain that the Partnership Agreement provides core funding from the Welsh Government to County Voluntary Councils (CVCs)

EXPLAIN that the current Partnership Agreement expires in March 2013, and before a new agreement is introduced, the Third Sector unit of the Welsh Government are keen to receive feedback and comments on the partnership agreement from key stakeholders, which will help inform the development of a new agreement which will be introduced from April 2013, and to ensure that the new agreement is fit for purpose.

Interviews will last approximately 60 minutes and that they will be recorded for analysis purposes only. No individuals will be identified in the reporting so they can be honest in their views.

Explain if necessary that researcher works in Knowledge and Analytical Services and has been asked to conduct a review of the partnership agreement by policy colleagues to assist with future developments.

NOTE: Some interviewees may be familiar with WCVA, volunteer centres and WCVA. Some may be more familiar with one part of the infrastructure. In the interview you may wish to be clear about which part of the infrastructure interviewees are commenting on.

1. Views on objectives of Partnership agreement

The objectives of the current partnership agreement are set out clearly in the agreement.

Note: Respondents were sent objectives prior to the interview and were asked to consider whether they are still relevant and fit for purpose. (See appendix 1)

FOR EACH BULLET POINT ASK: Do you think this is still relevant? Is it fit for purpose?

If yes, why do you say that?

If not, why not? What would they change about it?

Role of the WCVA

- Supporting and promoting the work of voluntary and community groups at national, regional and local level;
- Interpreting and articulating the views and concerns of the voluntary sector;
- Supporting and promoting volunteering and the interest of volunteers;
- Promoting community cohesion and inclusion, and building social capital;
- Developing and supporting new initiatives, particularly with regard to the priorities identified in *Civil Society, Civil Space*;
- Maintaining and improving performance and effectiveness.

Role of CVCs

- Providing support services for local organisation (information services, funding advice, practical services, training services, organisational advice);
- Identifying common concerns and interests;
- Representing the local sector and its concerns to others;
- Establishing and maintaining formal links between the voluntary sector, the local authority, the NHS and other bodies;
- Helping to establish new voluntary sector services and initiatives;
- Meeting organisational standards.

Role of Volunteer Centres

- Supporting the development of and promoting a range of good quality volunteering opportunities
- Providing volunteer-centred services which are available equally to everyone
- Providing services that are efficient, informative and helpful
- Developing and maintaining standards of good practice
- Monitoring and carrying out an annual review of their services.

What are your views of the objectives as a whole? PROMPT: Do they cover all the relevant points of the infrastructure? If not, what's missing?

If not relevant – which ones would they take out and why?

2. Delivery of partnership agreement objectives

Explain that we're now moving on to discuss the delivery of the partnership agreement objectives by the third sector.

NOTE: Respondents were asked to rate these out of ten in terms of importance and effectiveness of delivery. (See appendix 2)

How did they rate each of the following core services in terms of importance?

- a. Identify changing needs of the sector
- b. Information services, (including disseminating information)
- c. Respond to consultations
- d. Represent views of the sector
- e. Training (including identifying training needs, providing training and training services)
- f. Volunteering (including recruitment, sharing best practice)
- g. Providing advice to the sector (e.g. funding advice, organisational advice)
- h. Providing support to the sector (e.g. trustee support)
- i. Joint working with the public sector

Why have they rated them that way?

How did they rate them in terms of effectiveness of delivery? Why have they rated them that way?

EXPLORE if inconsistency between ratings – especially those that rated higher in importance and lower in effectiveness of delivery.

Explore any issues raised about each of the above – what has worked well / not well. Why / not?

What are the barriers that prevent the third sector infrastructure from delivering these?

What provisions need to be made in the next partnership agreement to ensure the infrastructure of the third sector is able to deliver on the above?
Are there any other key deliveries that should be included in the new partnership agreement?

3. Views on the monitoring information provided

ASK WCVA, CVCs, Voluntary Organisations who receive funding from the WCVA:

What are their views on the monitoring information that is provided to the Welsh Government?

Is the information gathered relevant?

If not, what information should be collected and how should it be presented?

There is a view that there should be more of an emphasis on outcome based performance indicators – what are their views on this? Would these be more appropriate measurements? What outcomes do they think should be measured?

Some suggestions for the types of outcome based performance indicators are:

- Satisfaction with how enquiries are dealt with?
- Evidence of organisations making improvements to their work as a result of support from the infrastructure
- Evidence of change and improvements in policies or services as a result of representations made by the infrastructure

What do they think about these?

How easy/difficult would it be to collect the relevant information/data for such indicators?

ASK NCVO, SCVO, Big Lottery, Wales Co-op, Voluntary organisations who do not receive funding from the WCVA:

How do they monitor the performance / impact of the work done by their organisation?

How do their funders monitor their performance?

How often do they monitor performance?

What do they measure?

Why do they measure those particular

Do they have KPIs? If so, what are they?

Any issues in collecting the necessary information? If so, how do they overcome these challenges?

Annexe C

Interview Pre-task

Review of the Welsh Government's Third Sector Partnership Agreement.

Pre-interview task

Thank you for agreeing to take part in a telephone interview to assist with the development of a new third sector partnership agreement. The Partnership Agreement provides core funding from the Welsh Government to the Welsh Council for Voluntary Action (WCVA), County Voluntary Councils (CVCs) and Volunteer Centres. To help with the discussion during the interview please complete the two tasks below. By considering these beforehand, it will help to maintain the focus of the discussion and to help us keep to the one hour appointment.

Task 1: Relevance of Third Sector Partnership Agreement objectives.

The objectives of the current partnership agreement and who is responsible for delivering them are set out clearly in the agreement.

Please consider your views on whether the following objectives from the current partnership agreement are still relevant and fit for purpose.

Role of the WCVA

- Supporting and promoting the work of voluntary and community groups at national, regional and local level;
- Interpreting and articulating the views and concerns of the voluntary sector;
- Supporting and promoting volunteering and the interest of volunteers;
- Promoting community cohesion and inclusion, and building social capital;
- Developing and supporting new initiatives, particularly with regard to the priorities identified in *Civil Society, Civil Space*;
- Maintaining and improving performance and effectiveness.

Role of CVCs

- Providing support services for local organisation (information services, funding advice, practical services, training services, organisational advice);
- Identifying common concerns and interests;
- Representing the local sector and its concerns to others;
- Establishing and maintaining formal links between the voluntary sector, the local authority, the NHS and other bodies;
- Helping to establish new voluntary sector services and initiatives;
- Meeting organisational standards.

Role of Volunteer Centres

- Supporting the development of and promoting a range of good quality volunteering opportunities
- Providing volunteer-centred services which are available equally to everyone
- Providing services that are efficient, informative and helpful
- Developing and maintaining standards of good practice
- Monitoring and carrying out an annual review of their services.

Task 2: Delivery of the Third Sector Partnership Agreement objectives

Please rate each of the following core services from the Partnership Agreement between 1-10 in terms of **importance** (Where 1= not important at all and 10 = very important) and **effectiveness of delivery** (where 1=not delivered effectively and 10 = delivered very effectively)

| | Importance | Effectiveness of delivery |
|--|-------------------|----------------------------------|
| Identify changing needs of the sector | | |
| Information services, (including disseminating information) | | |
| Respond to consultations | | |
| Represent views of the sector | | |
| Training (including identifying training needs, providing training and training services) | | |
| Volunteering (including recruitment, sharing best practice) | | |
| Providing advice to the sector (e.g. funding advice, organisational advice) | | |
| Providing support to the sector (e.g. trustee support) | | |
| Joint working with the public sector | | |