

Healthy Organisations exists
*to enhance the effective and efficient management,
 delivery, marketing and evaluation of the
 client organisations*

Background

Healthy Organisations is an organisational development and support contract that works with 46 voluntary organisations across the Glasgow area. The beneficiary organisations are all small, local and, in the main, fairly new. Healthy Organisations provides a range of management consultancy services that develop the evaluation, strategic planning, HR, management and leadership capacities of each organisation. The support includes technical support around employment law, charity and company law and ICT.

Healthy Organisations is funded by Greater Glasgow and Clyde Health Board who have an ongoing partnership stake in the long term community development impact that these organisations have on health needs in some of the poorest areas of Scotland.

The Critical Friend Model of Support

Now at the end of the second operational year, we have a much greater understanding about the key factors which differentiate this case coordinated model of organisational support.

Organisations report that the support received from Healthy Organisations is delivered as though by a range of known 'Critical friends'. These 'Critical friends' make regular interventions to move each organisation forward, or to work on issues that in the past would have knocked the organisation off track for a while. The work carried out in year two has been slightly deeper or more systemic than the start we made in year one. In some ways this means each area of work has become more complex, but we have been able to keep costs to a minimum because we are building on shared experience.

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The Healthy Organisations Team

The External Context 05/06

This year has seen considerable change in the statutory structures that are integral to the immediate public policy which organisations interact with on a daily basis. SIPs have become ten Community Planning Partnerships, and Greater Glasgow Health Board has evolved into five Community Care and Health Partnerships. So both of the major local authority partners that work with and fund the organisations have changed their geographical remit and have also formed into new organisations.

In most areas, the structural changes have led to significant changes to key personnel and policy forums with which the organisations have built up strong working relationships.

So, not only have individuals changed, but the institutions too, leading to a natural uncertainty of 'how things are done round here'.

There are two main impacts of this for almost all organisations. Many are experiencing a second year of standstill funding or cuts. They are also finding that the strategies that they need to work to are changing. In many cases, the local strategies are starting again from scratch. The policy changes such as the push on worklessness and addictions and the 'not quite knowing' where health will fit in, hasn't yet significantly affected the organisations.

This year has also seen the beginning of major City Council cuts due to the equal pay settlement. As result, the SIB budget was cut, affecting the Community Health Projects, and closing Healthy City Partnerships. Our experience is that the officers working with organisations on the ground, have been trying to minimise the confusion. But the context of all these types of change happening in the same year (let alone the pay reviews going on in NHS and GCC) is pretty overwhelming.

This year, the Office of the Scottish Charity Regulator (OSCR) has started being actively in touch with organisations and producing much more developed guidance for charities than we have seen before. Also, the return of the Big Lottery Fund has been a welcome source of ideas and investment funding on the ground.

The last major change that has started, but not yet been felt in its full effect, is the change to local support agencies connected to the Council. The merge of various Local Economic Development Companies (LEDCs) into five organisations, and the closure of the Community Forums is beginning to affect the amount of the support that was available to very local organisations.

As a result of all the changes, the organisations have found it difficult to plan strategically and to work in partnership in line with the statutory context, particularly when keeping afloat with standstill funding. Fortunately (or unfortunately depending how you look at it) the needs of people in Glasgow that we all serve haven't changed much this year.

Some of the managers and management committees whose strength was in people-to-people partnerships within these structures have found the year a bit isolating and are waiting for this all to settle down.

In light of these realities, Healthy Organisations has adapted its work, supporting organisations to stay as connected as they can be and plan according to need.

Next year, the officer and area planning level of the main local authority partners should more settled, and we may see opportunities for local organisations as the council elections with multi-member wards and proportional representation (PR) create the potential for local causes to be championed.

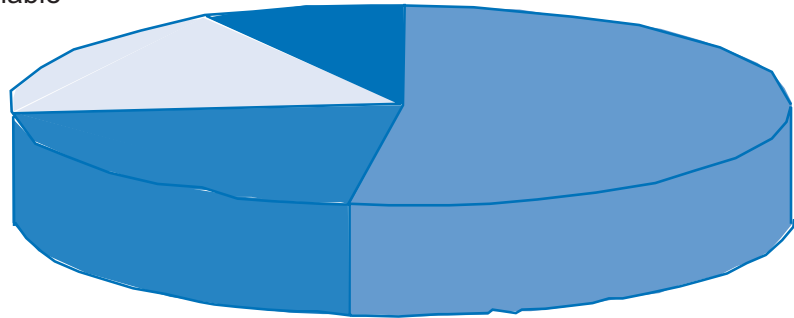
Engagement with client organisations

The depth of service usage and relationship has gone up as expected in this second year, with a higher level of trust developed from managers and staff. Those organisations using the service to its full extent are getting an average of between 10 and 25 days' worth of advice and consultancy. This hands-on support builds incrementally on the work we did with them last year.

8 organisations have used very little or none of the services available

4 organisations joined Healthy Organisations this year

24 organisations use Healthy Organisations for 10-20 days advice and consultancy



10 organisations use Healthy Organisations for main services only

Service Usage

We have adapted the model of services considerably throughout the year according to the needs and discussions with each organisation. In evaluations, organisations say that the greatest difference in the way Healthy Organisations works is that 'You always work on our issues, where we are at, when we need to do the work and involving our context. You never waste our time or expect us to come to some centralised programme'

In about twenty cases, together with the client, we have shaped and delivered a specific consultancy assignment to move the organisation on a dynamic or structural issue. Examples have ranged from working with a pair of organisations on merger details, to reviewing the staffing structure and team processes to enhance the development work.

The loss and replacement of managers has created both opportunities and threats to the development work. Inevitably it creates a six-month standstill on the work. We have found that offering services to and through new managers has been a great resource for their new role.

Average Ratings on client usage of Healthy Organisations

- **80%** needed the support services
- **60%** helped the organisation work on short term issues
- **80%** supported future development of the organisation

There have been a couple of cases where it became clear that the management committee had the impression that Healthy Organisations was 'on the side of' or 'only for' the manager or staff. This can isolate and damage the confidence and development of the management committee who ultimately own and direct the organisation.

5 managers (CEO Role) have changed in the organisations – which normally creates a 6 month hold on organisational development.

6 organisations have closed this year.

To this end, Healthy Organisations is trying to make sure we inform, include and work with the management committee level more and more.

NB. All the statistical data and quotations have been gathered through internal evaluation processes with clients. An external evaluation being facilitated by Rocket Science is due to report in Summer 07

The role of the case co-ordinator



Duncan Wallace,
Case Co-ordinator

Healthy Organisations has a clear a clear menu of 10 service areas, shown in a clear action plan and jigsaw diagram signposts the organisations towards their 'entitlement' to all areas. However each of the services is constantly adapted to meet the needs and in many cases we have joined up resources to complete more complex assignments.

The service and case coordination element of the support has proven to be one of the most useful tools in the contract. The annual review meetings with the coordinator has often had a significant impact on moving the organisation forward. These meetings focus on the organisational needs (rather than the work of the organisation); reflect on progress, strengths and weaknesses; and design practical, timetabled, trusted ways that the services can work on those needs. I have found that where the review has also included the Chair or a Board Member the exploration of what the organisation needs has been very rich.

Alongside the reviews, the Healthy Organisations works proactively with organisations by dealing with enquiries, chasing actions, catching up with developments, going to Board meetings and networking. Three and a half days of case coordination work is spent on each organisation. The subsequent workload for forty-six organisations should ideally be shared by two coordinators. This would allow the networking and policy elements of the work to be included.

Organisations have described the service as providing, 'circles of support that means I don't need to worry on my own about how we are going to do all this, or make progress. I know I am seeing our Mentor soon, or I can phone Duncan to discuss what we need. This has a huge reducing level on my stress.'

This model of being out and about is a complex arrangement with an average of 3-4 interventions happening somewhere in Glasgow each day, can be costly (in travel time) and complex to coordinate, but it is more effective for the clients, and is surprisingly not more expensive than other organisational support teams.

Our work is almost all operationally- and technically-focused, a method which is definitely needed and successful. This model is built on the assumption that enabling the organisations to each be stronger will mean that they are able to sustain and compete in the current context. But, with all the current changes, there is a need for some kind of networking, advocacy and policy work to influence the working environment on behalf of all the good work the 46 organisations do. This policy element could be similar to the work carried out by Healthy Living Centre Support Programme, which is proving very influential with its conferences, practice development and national policy work.

'Because Healthy Organisations is coordinated within a live relationship and there are no costs to us we have found ourselves dealing with problems much earlier on than we used to and so moving on quicker without getting stuck.'

Core Services



Strategic Planning

3 organisations have re-done their 3-5 year business plan

10 organisations had a facilitated day to plan 2006/7

3 organisations had stakeholders days (exploring the future from many perspectives)

3 organisations had development days (exploring the purpose/management or core principles)

8 organisations had consultancy to (develop specific areas of their planning – such as marketing/funding or negotiations)

Plans for 2007/8

Strategic Planning is an area often neglected by the organisations. However, management groups have started to see the benefit of a regular annual planning and development process due to the mentoring support for managers and more direct contact with the directors of the organisations.

We plan to follow up all the existing planning processes by offering a complementary process this year using the same consultant. We plan to support other managers by going to the Board meetings to directly offer and explore the strategic planning processes.

The interventions of this service are very varied. The standard intervention is to plan, facilitate and write up a planning process with all the voluntary Board, staff and key stakeholders. We have also assisted with reviewing business plans, developing marketing plans and consulting on strategic planning sub-groups. In a few cases we have provided negotiation strategy consultancy in the background to funding negotiations.

Qualitative evaluation evidence

Where we have facilitated a substantial planning day, organisations report improved motivation among staff, managers and management committee members as a result of debating the key objectives and needs for the coming year together. This, in turn, has a knock-on effect on the communication between the Board and staff. In several cases, working groups were then established to concentrate on the detail and implementation of the plan.

The stakeholder days have helped increase the buy-in from partners in the area. This has been evidenced in the development of new programmes or receipt of new funding.

A few of the development days have helped expose and prioritise key internal issues which were holding up development.

Training Needs Analysis and Team Building

The main training needs identified in the analysis concern managers and development staff. Managers and CEOs tend to need training in negotiation, business planning, evaluation and strategic analysis as well as some detailed knowledge of employment law. They could also benefit from organisational management learning to explore themes such as managing change and working with your Board.

Development Staff need Project Management training focusing on the input-, output-, outcome-structure of project design and project planning. Many also need community research skills and groupwork or training design skills. Organisations seem pretty good at accessing appropriate courses for their delivery and administrative staff.

Qualitative evaluation evidence

Most organisations have implemented the practical aspects of sending staff on identified courses. This is shown in GCVS training department where the organisations have bought eighty days' training on relevant subjects in the last year. Several organisations have altered the team meetings, improved the reporting structure and used the learning and development policies as we advised.. Some of the organisations who took part in our TNA have now learned how to carry out their own TNA alongside a proper appraisal process.

10 organisations have had a full TNA process, with individuals and team recommendations.

43 staff have had their individual training needs assessed and training plans drawn up

6 organisations have had a team development day

4 organisations have received other training related consultancy

Plans for 2007/8

We will provide a full TNA for a few of the organisations.

For most, we will provide consultancy to enable the management to put in place routine processes like appraisals that include TNA elements.

We will also facilitate of team development processes.

Employment advice and consultancy

Qualitative evaluation evidence

Organisations frequently report how their stress levels go down once they start working with the Employers Advisor (Linden Stables) and can take a step by step pragmatic approach.

Several organisations have established staffing sub-groups to work with Linden on issues and this has created a permanent system for keeping track of employment matters.

Staff and Managers comment that they have noticed that their Boards have become more actively interested in ensuring good employment practice.

For several organisations, the experience of managing a grievance or disciplinary situation properly this year has led to good outcomes for the organisation staff members have left the organisation or improved their performance.

30 organisations have used the service

17 organisations have used the service for development work (contracts, job descriptions or policy reviews)

23 have used the service for short term critical situations (absence issues, discipline & grievance and redundancy)

Plans for 2007/8

We will host some briefing sessions to increase the involvement of Board members across the organisations.

Financial Management Consultancy

17 organisations have worked with Brett.

4 Treasurers have had coaching.

8 organisations have used the service to work on long term system issues.

5 organisations have used the service to work on short term issues.

Range of Service:

The interventions have included:

- Coaching Treasurers in their role and reports,
- sorting out cost allocation systems,
- calculating redundancies,
- helping produce clearer management accounts,
- helping an organisation recruit a finance person for a maternity leave,
- calculating full cost recovery models for sub-projects,
- guiding organisations about asset transfer & winding up,
- installing SAGE to constructing a purchase order system

The Financial Management Consultancy service was reviewed at the end of 2005 by the Steering Group. As a result, they decided to move away from focusing solely on Financial Record Keeping, which wasn't working well, to a broader remit of consultancy on all areas of Financial Management. We re-commissioned this area of service in February 06 to Brett Nicholls, CA, who has a long track record of financial management consultancy and support in the sector.

Qualitative evaluation evidence

Many clients have commented on how helpful they have found the clarity of Brett's work. His follow-up letters and examples of management accounts have meant that they were able to make simple improvements quickly.

We have noticed that Brett's skillful working with all three levels of administration, management and Board has helped strengthen these key working relationships.

The practicality of having an expert available for new modelling and costing tasks has had a reported positive effect on the stress levels of some managers.

There are a couple of organisations where the analysis or costings led to immediate action by the organisation to secure more money.

Statement on progress

Brett has built up good relationships and carried out detailed and practical work done. As already shown, particularly in the areas of costings and role/relationship enhancement, this area could have a more significant development impact over the next year, particularly amongst an external context of funding shortage.

Plans for 2007/8

We will continue undertake a range of individual consultancy projects, and to build on this year's work by:

- Gathering treasurers together to do a training session on areas that are common to all. This training will be followed up with consultancy visits.
- Leading a couple of short training sessions for managers and administrators on how to make your systems work better for the new SORP and funder requirements. This training will be followed up with consultancy visits.

"The service is very good at matching the right consultants to the organisation and the right needs."

Additional Services

Mentoring

30 Managers and CEOs have had mentoring in a total of 150 mentoring sessions.

5 Managers and CEOs have had delegation/time management coaching assignments.

Qualitative evaluation evidence

Managers rate mentoring support as the service which is most influential on their leadership and management. They describe mentoring as a space to solve problems, uninterrupted by daily work. Mentoring has helped solve problems in partnership working, developing relationships with the Board, working through different staffing options and thinking through work plans. Several managers and CEOs said that they wouldn't have made it through the year except for the mentoring support. One CEO said that mentoring had helped him see his own contribution to the organisation more clearly. Often, all the changes and turmoil of funding, staffing, committees can make it hard to see what your own management contribution is.

Plans for 2007/8

- The managers want to continue with the mentoring relationships
- We intend to increase the impact by continuing to offer coaching assignments and working with the Chairs as well.

Evaluation Development

Steve's work this year has built on last year's learning sets. He has led workshops with Boards, setting outcomes and outcome indicators to indepth work with the Healthy Living Centres on the Performance Assessment Framework. He has also reviewed and reshaped organisational evaluation evidence for a number of organisations.

12 organisations are receiving ongoing consultancy

Qualitative evaluation evidence

Organisations have reported that the on-site consultancy has helped clarify how their evaluation evidence is collected and stored, and their relationship to the every day monitoring tasks. Two organisations have developed and run evaluation working groups where staff and management regularly check and develop their evaluation practice.

Plans for 2007/8

- The needs for evaluation development are ongoing. We now have a range of managers and development workers who 'get it', but getting others, particularly partner agencies, to buy into and develop evaluation processes requires ongoing consultancy.
- Database development is a key need for many organisations. We are hiring an expert to the team to work specifically in that area with organisations. In some cases they may need to commission a new database and we will consult to help them develop an appropriate brief.
- We also plan to put on some short workshops, on topics like 'Using your Evidence in Reports' and 'Running Focus Groups' or 'Setting Outcome indicators'. These would create another helpful mix of organisations working together, from which more momentum for consultancy will be identified.

Legal Advice and Support

Legal support is built on a referral only basis to this contract.

7 organisations have adapted their Memorandum and Articles or constitution

8 organisations have received detailed employment legal support

10 other legal issues have been handled

Governance Development

32 Board members have had individual development interviews that resulted in training needs and board development programmes identified.

3 organisations have received consultancy on how to close their Charity/Company.

9 organisations have received consultancy on developing their Mem & Arts or Constitution.

5 Chairs are working with a Mentor.

Needs identified

Our experience shows that Board Members mostly need advice on how to fulfil their roles and responsibilities, contributing the best of their skills and experience, rather than training in what their roles and responsibilities are.

Almost all Boards are underpopulated and several are drawn from a very limited geographic community or section of society limiting their wider view. Healthy Organisations know from experience that developing the role of the Board and involving them in strategy and employment is central to being a healthy organisation.

This year, we have seen that the organisations with active Boards are those which are growing and developing and some of those that closed had dormant Boards.

Qualitative evaluation evidence

Board members who received mentoring have reported that they find the space invaluable to explore how to get the most from everyone and work with the manager. The staff have reported a noticeable increase in confidence and questioning from the Chairs.

Boards have used the analysis from the interviews to go on training courses and to recruit specific people for gaps that were found.

Plans for 2007/8

- A Chair and CEO development programme and a Board recruitment programme has been planned for all organisations. (see recommendations.)
- Increasing the mentoring and coaching relationships
- A few in depth development programmes will be provided.

ICT Support

The ICT Technical Support was originally envisaged to help a few of the organisations who didn't have an adequate way of looking after their ICT needs. It seems like in this area our job is almost done. Most of the organisations are now in a stable ICT situation. We have set up ongoing support for all organisations and we have fixed and developed the infrastructure for those who need extra help.

Development work has included:

- ICT Audits and reports
- fixing infrastructure issues by installing and configuring a server
- setting up sharing of printers and key ICT resources
- setting up regular back up systems

Qualitative evaluation evidence

Clients rated the service 5 out of 5 on average, saying that the solutions and customer service were excellent. Comments included that 'Andy has been wonderful, always helpful and clear.'

13 organisations have been supported this year

5 organisations have been audited and then received appropriate support from IT First

6 organisations GCVS has become the IT support provider

Plans for 2007/8

We envisage a small amount of ongoing work with some of the smaller organisations. We will ask them to make a small financial contribution towards the ongoing support.

We think that 2-3 of the other organisations may discover problems that require an overall audit and the resultant new solutions.

Contractual relationship with Greater Glasgow Health Board (GGHB) and costs



During the second year we have really appreciated how the contract with GGHB has been managed. The regular meetings between the Coordinator and Project Officer, together with the quarterly Steering Group meeting made up of all the main agencies and several organisations, has enabled us to adapt and develop services throughout the year.

The independence and client confidentiality of the contract have proved important at several points during the year. This is particularly important when supporting organisations who are having major funding withdrawn from both the Health Board and Council and when working in depth with those organisations which are in a considerable structural mess. We have turned round several of those which were in crisis from such critical points. It seems now clear to all the organisations that we are purely working in their interests. The good news from the evaluation evidence so far is that the strengthening of the organisations is also having a good effect on the Health Board's targets and development needs.

Costs and Budgets with Healthy Organisations are extremely tight. It costs just £2,500 per year per organisations, yet most organisations estimate that the support actually provided would otherwise have cost between £6,000 and £30,000! We are managing to keep costs low by delivering services on site by working specifically with each situation and also by having just one co-ordinator. This is both a strength and a weakness.

For a second year our experience shows that each organisation needs an average of three to four days' coordination time per year to enable meaningful engagement, particularly in order to reach the management committee and work with the constant levels of change. The model of case coordination together with a mixture of hands on consultancy services works well. The resources, however, that have often been over-stretched to work with the most needy and critical situations. In future contracts we would suggest a ratio of 1 coordinator to 20 organisations.

Healthy Organisations is a cheaper model of working compared to other models like Scottish Enterprise Social Enterprise support teams, Lloyds TSB Capacity Team, or Community Enterprise in Strathclyde.

“Healthy Organisations is very good value for money from what we have got out of it. It hasn't cost us any extra time to get what we needed from the contract. It is very time efficient.”

What other support do organisations access?

The Steering Group specifically asked Healthy Organisations to continue to map which other support providers organisations use and for what purpose. We gather this information mainly through the annual review meetings.

Most of the organisations have active relationships with 'Link Officers' most notably from the Health Board as well as some from the Council through the Community Area Teams, Community Planning or Housing Associations. This advisory role can be invaluable to the organisations, linking them to the area strategies and partnership working.

The other key common link for some of the Healthy Living Centres (HLCs) has been the CHEX-led National Support Programme. This programme has been a valuable champion for improving understanding about HLCs. The lobbying effect of the recent CHEX national conference with positive keynote speeches from the National Lottery and task group, as well as examples from elsewhere in Britain gives a very strong sense of purpose and context to HLCs.

However the vast majority of organisations have very few meaningful organisational support or development links in place from development agencies or specialists. Several organisations get support in a specific area from a local body often without a holistic organisational development approach. The most common examples were about providing work placements or ICT support.

Many organisations report that getting organisational support from other sources is that it can be hard work and that the support often comes with a tight agenda. This is particularly true for those organisations which aren't big enough, or don't have enough managers to fit the criteria. However there is good evidence to suggest that the organisations are pretty sharp at taking the good supports that they find.

See Appendix 1 for a full list of the support providers which our organisations use alongside Healthy Organisations.

Sustainability, replication and influencing work of the Healthy Organisations model

Throughout the year, Healthy Organisations has shared its model of working and experiences with several key agencies so that they could develop a similar approach in their area or organisation. These include the Big Lottery Fund, Edinburgh Voluntary Organisations Council, Glasgow Sports Council, Evaluation Support Scotland and the Transformation Team.

We worked with the Community Led Task Group specifically highlighting the model for the next stage of the Executive's Health Challenge strategy. We recommend that organisational support and development are as integral to ensuring the delivery of the community-led approaches that are proving so effective. GCVS has developed a replication of the model for another 10 small advocacy and care-based organisations in the city. This will be funded by the Baring Foundation who are specifically interested in ensuring the added value of the 'independence' of the voluntary sector. This will last for 2 years and will include GCVS in a British network of organisational development practice working on similar issues.

Plans for 07/08

Organisations report that they have appreciated most of all the effect of having a 'web' of support relationships through Healthy Organisations. We feel that our consultancy is more effective the more we learn about the culture and challenges of each organisation. So overall, each of the services continues as outlined above with each one ensuring that the organisation is developing its own capacity (in skills, and policies, practices) to do these things for itself in future.

There are 3 new developments for 07/08

Next year, to counterbalance the current isolating environment, we will need to create more opportunities for organisations to learn together, swap experience and develop ideas.

- 1. We will be running a Governance Enhancement Programme** with Chairs and CEO's from several organisations working together in one learning set. Many organisations have welcomed this idea as a unique opportunity to focus on how they use and develop their key leadership and management roles. We expect 10 organisations to benefit from this.
- 2. We will be running a series of themed learning exchanges** that cluster and bring out very specific areas of management experience that wouldn't otherwise feature. We will create these learning exchanges and invite specific organisations to facilitate the management and systemic learning aspects. We expect twenty organisations to benefit from this.
- 3. We intend to run a Management Committee Recruitment Programme** throughout the year. This will take both members of the public and new management committee members which the organisations have recruited. We will provide a Coach, a training programme and then organise 3-month placements to develop each participant's technical and practical ability to become a Board member. The person may go back to the Board they are already on, or join the Board they have been on placement with, or find another. The Coach and programme will also provide feedback to each participating organisation with ideas of how else we could help their whole Board develop. We expect 20 organisations to benefit and 10 new Board members to become volunteers.

Recommendations

1. We recommend a quick move towards 3-5 year funding arrangements, either by contract, grant or service level agreements.

Another year of single year funding arrangements with standstill budgets is causing lack of strategic focus and continual increase on the paperwork demands on the manager. The management and leadership focus of the organisations is forced to concentrate on funding and local funding relationships, rather than on the work and the needs.

2. An event for all Healthy Organisations in late 2007/8.

We think that there should be some kind of event done with the Health Board (all CHCP's), Council and BLF publicly championing the role of this size of community based organisation in relation to health improvement across the city. The conference would bring all the 46 organisations together showing their work, exchanging their development ideas and celebrating their achievements as maturing organisations. We believe this would have a similar effect of enhancing the organisations' sense of being in a wider positive context of a variety of models that work well and have a solid purpose in society.

3. Developing the ongoing organisational support models.

In Summer/Autumn 07 we will start talking with each CHCP about ongoing organisational development and management support needs for the organisations engaged in health in their areas.

"The diversity of, and access to services has been excellent."

4. Guidance for Local Authority Officers in their supporting roles with organisations.

These relationships can be invaluable partnership links for the organisations in terms of working with local strategy, developing ideas for projects, developing partnerships, setting a wider context and regular support. However the way in which officers take up their role and the areas of organisational life in which they are involved is very variable. With all the changes to Health Board and Council structures this year these 'link' roles are changing too. It would be helpful for the organisations- and to many of the officers we have spoken to- if there was written clarity about the link roles.