

Working together to achieve your mission

A model of collaborative working

How this model can help

This is one of a series of models covering the different ways that voluntary or community organisations can work together. It is aimed at chief executives, managers and trustees.

Voluntary and community organisations can collaborate on any area of their work, whether on the 'frontline' activities directly enabling them to fulfil their mission or the supporting 'back office' functions which underpin these activities.

The activities of an organisation whose mission is to support vulnerable young people, for instance, may include running a drop-in centre to help individual beneficiaries. The equivalent activities of infrastructure organisations like councils for voluntary service focus on support and representation for their beneficiary organisations.

This model looks at how organisations collaborate on the projects that directly contribute to their overall mission. Case studies illustrate the range of ways this can be done.

This guidance is no substitute for legal advice.

It is useful for organisations asking:

- What can we do to make collaboration successful?
- How can we fund & manage our joint work?
- How should we communicate?
- How have other organisations handled these issues?

Our guidance on developing joint working agreements complements this document. Please visit www.ncvo-vol.org.uk/jointworkingagreements

For our other models of collaborative working and more detail on the case studies, please visit www.ncvo-vol.org.uk/jointprojects

Bridge House Trust



The Baring Foundation



The Collaborative Working Unit is supported by the Baring Foundation, the Bridge House Trust and the Lloyds TSB Foundation.

What is collaborative working?

NCVO's Collaborative Working Unit defines collaborative working as partnership between voluntary or community organisations. An organisation may work with one or two others or may belong to a wider consortium. Organisations can work together in a spectrum of ways, from informal networks to joint delivery of projects, and for a range of purposes. Collaborative working can last for a fixed time or be permanent.

C A S E S T U D Y

Shelter and Stonewall Housing – Sexuality and Housing Project

Shelter and Stonewall Housing combined their expertise in a 15 month long joint project to tackle housing problems faced by lesbian, gay and bisexual people and promote good practice in the services that support them.

The project had one staff member, a Policy, Training & Development Worker who was selected by both organisations. Shelter paid her salary and took on the legal responsibilities of employing her such as monitoring absence. Stonewall provided monthly line management support to her as they had more expertise in the project area.

The Policy, Training & Development Worker was based half time in each organisation. She used:

- a laptop networked into both organisations
- a mobile phone instead of two land lines

www.stonewallhousing.org
www.shelter.org.uk

Working together to achieve your mission

"We work best when we work across our areas of expertise."

Shami Chakrabarti, Director, Liberty

Voluntary and community organisations working together on joint projects can make their frontline activities more effective and/or more efficient. If your collaboration successfully achieves one of these outcomes, it does not necessarily mean the other will follow as a matter of course.

It is trustees' responsibility to make sure that an organisation's activities further the aims set down in its governing document. So when deciding whether and how to collaborate on joint projects, the most important question is whether joint working will make you more effective for your beneficiaries.

NCVO's checklist, *Should you collaborate? Key questions* offers more general guidance to help organisations make informed decisions about whether to collaborate.

Benefits of collaborative working can include:

- Improved or wider range of services for beneficiaries
- Wider geographical reach or access to new beneficiary groups
- More integrated approach to beneficiary needs
- Financial savings and better use of existing resources
- Knowledge, good practice and information sharing
- Sharing the risk in new and untested projects
- Capacity to replicate success
- Stronger, united voice
- Better co-ordination of organisations' activities
- Positive PR opportunities around reduced duplication
- Mutual support between organisations

C A S E S T U D Y

Faith Regen UK and East London Mosque – capacity building & outreach

Faith Regen's 'Faith Initiating Regeneration' (FIR) project addressed the capacity needs of faith based organisations in East London. Funded by the Learning and Skills Council London East, it brought together a number of partners including East London Mosque. Faith Regen's capacity building partnership with East London Mosque established an ICT centre which can be hired out for training sessions.

Imams have also supported outreach activities by mentioning support services in their sermons. They encouraged worshippers to attend job surgeries held in the mosque after prayers when a Faith Regen outreach worker set up a laptop and advised people on job opportunities. Having local access to guidance and information which is provided in a culturally and faith sensitive environment gave confidence to the residents of East London that the project supported.

A partnership agreement between Faith Regen and East London Mosque outlined how the two agreed to work together, while their service level agreement stated specific outputs to be achieved.

www.faithregenuk.org

Joint support to local partners in Malawi

Harvest Help and Find Your Feet are UK-based international development agencies. They have a joint sustainable livelihood programme in Malawi, run from a joint office by local staff who see their employer as Harvest Help/Find Your Feet.

The agencies set and review programme strategy together, but support local partner organisations to manage their projects because local partners best understand local needs.

Success factors

Joint working has allowed the agencies to establish a range of projects relatively quickly since they began work in Malawi in 2002. The arrangement works well because:

- both organisations share a development vision and approach
- they have complementary areas of expertise
- communication is good – for example, funding applications are carefully co-ordinated to avoid mixed messages to donors
- there is trust, confidence and ‘creative spark’ between the two Directors

“We trust each other and because of that, we accept criticism from each other in the belief that it is done for the good of the programme.”

Dr Dan Taylor, Director, Find Your Feet

Management and funding roles

Programme strategy is jointly defined by both organisations, but key responsibilities are divided. Find Your Feet line manages the Malawi Programme Manager while Harvest Help has responsibility for financial management.

“We have to be disciplined in going through Find Your Feet on line management issues.”

Andrew Jowett, Director, Harvest Help

Find Your Feet and Harvest Help decide which agency will lead on developing each project funding proposal. The decision is based on who identified the potential donor or who has the stronger relationship with them. Once the proposal is agreed by both organisations and then funded, its lead agency is responsible for implementing that project. However, Find Your Feet continues to take overall responsibility for liaison with the Malawi office on programme matters.

More information

Dr Dan Taylor, Director, Find Your Feet
email dan@fyf.org.uk
or telephone 020 7326 4534
www.fyf.org.uk/howwework/default.htm

Andrew Jowett, Director, Harvest Help
email andrew@harvesthelp.org
or telephone 01952 247162
www.harvesthelp.org/malawi.php

Potential risks include:

- Outcomes do not justify the time and resources invested
- Beneficiary confusion
- Loss of flexibility in working practices
- Complexity in decision-making and loss of autonomy
- Cultural mismatch between organisations
- Diverting energy and resources away from core aims
- Change management challenges
- Lack of consistency and clarity on roles and responsibilities
- Dilution of your brand
- Damage to organisation if collaboration is unsuccessful
- Legal obligations

Preparing to work together

60% of organisations responding to a survey on collaboration between voluntary organisations said that 'working with other charities takes more time than we expected.'

Third Sector survey in association with nfpSynergy & NCVO 2005

Although it can bring great benefits, working with other organisations is more complex than working alone. Its success rests on a combination of formal and informal ways of achieving good working relationships on both an organisational and an individual level.

It is essential to discuss how you will work together, defining roles, responsibilities and contractual or other legal obligations, and to get this in writing in a joint working agreement. People working in collaboration also cite the importance of values, such as trust, in their relationships. However, even where you have a pre-existing relationship and trust on which to build, preparation, planning and a written agreement can help you avoid misunderstandings.

It is important that staff and volunteers understand why their organisation is working collaboratively and have an insight to partners' aims and values. Time spent developing understanding of partners' culture can help people from different organisations to work together.

Securing organisational commitment to the collaboration should lessen the impact of staff moving on and ensure that your own organisation supports this way of working with resources and understands the investment needed to make collaboration work.

Successful collaborative working takes time and long term benefits may only result from considerable effort as you set up and maintain joint working arrangements. Partners need to plan for and explain this to stakeholders.

Issues to consider

Funding a joint project

Organisations vary in the funding mix they rely on to support their work. When you work together, you need a funding plan for your joint work. This should clarify whether you aim to support the work with funding secured for that particular project and how much you intend to draw on each organisation's existing funds or unrestricted income. While it is sensible to draw on the strengths of each organisation in particular types of fundraising, joint working also provides an opportunity for organisations to learn from each other.

- Who will be responsible for co-ordinating your fundraising?
- Funders often require that one organisation acts as accountable body for the receipt of funding. Which partner will take this role?
- How will you explain the joint project in fundraising material?
- How will you handle interim funding needs – for a feasibility study, risk assessment or the project set-up phase?

Charities must account for their collaborative projects in line with the Charities' Statement of Recommended Practice (Charities SORP) and describe the funding arrangements transparently in their annual accounts.

For good practice in securing and delivering public contracts with other voluntary organisations, please see our publication, *Joint working for public service delivery*.

Management structure

Someone in each organisation should be responsible for that partner's contribution to your joint project. Managers not used to joint decision-making may find the process time consuming and counter cultural. The key is to discuss and agree roles and responsibilities.

- How are you going to lead and manage your joint project? Many partnerships are led by a project co-ordinator from the accountable body, with a joint steering group overseeing the work. How senior should they be?
- Is one organisation better placed to co-ordinate a particular area of the work where they already have expertise?
- How can you get 'buy-in' from the relevant staff and volunteers before they start work?

See *Structures for joint projects* below for the different ways that trustees oversee collaborative work.

Staffing a joint project

The staff who deliver collaborative projects may do so as part of their existing post or they may be employed to work on a specific project. They may remain based in their own organisation or they may work in more than one location. In each case, careful planning and regular communication are essential for the arrangement to work well.

- Who will legally employ the staff working on the project?
- Who will bear additional costs such as maternity leave payments?
- How will line management arrangements work?
- How can you ensure staff remain informed of the work of partner organisations and have a chance to feed into project planning?

Clarity and consistency are key when a member of staff is working in more than one organisation. For instance, if there are disciplinary or grievance issues, the employee, employer and other organisation/s must all be clear on who has line management responsibility and therefore which organisation's policy and procedure to follow.

Working across organisations can be difficult for a member of staff. Terms and conditions, working practices and cultures vary between organisations and these factors can affect how valued, involved and supported staff working on a joint project may feel. It is important to be aware of such differences early on so you can decide how to handle them.

C A S E S T U D Y

Joint company for livestock registration

Three livestock breed societies – The British Limousin Cattle Society, Suffolk Sheep Society and Texel Sheep Society – have together set up BASCO Data Ltd, a company which they co-own.

Developing joint work

Discussion between the societies, two of which are based on the same site, found that they had a common need for replacement data systems. They jointly commissioned a specialist database to act as an online herd/flock book for the societies' members, providing them with a focal point for registration of animals and recording of pedigree, performance and health data. The BASCO Livestock System helps members make informed decisions about managing their livestock and cuts administration costs for each society.

Separate company

From the start, the three believed the system had the potential to expand into a wider resource for the livestock industry. They decided to form a separate company for this work to put it on a professional footing. A partnership agreement formalises how the societies share the running of BASCO and covers areas such as roles and responsibilities and intellectual property.

www.limousin.co.uk
www.suffolksheep.org
www.texel.co.uk

If new work involves staff moving from one employer to another, organisations may be affected by TUPE, the Transfer of Undertakings (Protection of Employment) Regulations. Legal advice should be taken on whether this applies to you.

For more on staffing collaborative work, please visit www.ncvo-vol.org.uk/jointstaffing

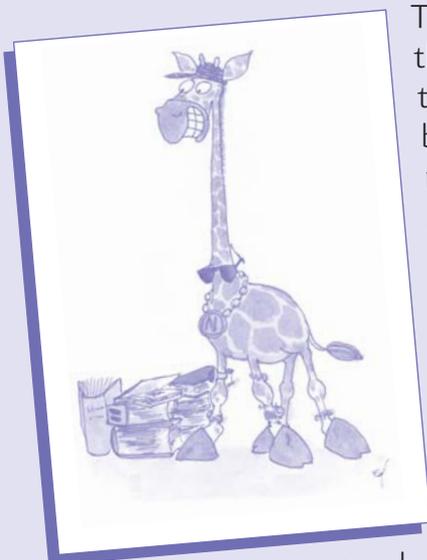
Communication & conflict

Poor communication is behind many of the disputes that threaten to stall collaborative working. A written agreement should minimise such misunderstandings. More informally, it is vital to keep lines of communication open, talking or meeting regularly and sticking to the schedule you devise for this together.

- How do staff and volunteers and their managers think the joint work is going? Discuss how best to keep each other in the loop – options range from ad hoc emails and phone contact to conference calls, meetings, written updates & awaydays.
- Are you clear on the boundaries of your collaboration? For example, sharing operations does not mean partners hold the same policy positions. When are you speaking on behalf of just your own organisation and when are you speaking as a group?

C A S E S T U D Y

Junior Giant Print Library



The National Library for the Blind (NLB) identified that there was nowhere for partially sighted children or teenagers to borrow large print books without having to buy them. In 2005, NLB addressed this by launching a new children's Giant Print free postal lending library service in collaboration with the National Blind Children's Society (NBCS).

NLB run the service, buying books from the range that NBCS produces or commissioning NBCS to produce new Giant Print books where the braille version has already proved popular or where a book has won a prize and demand is expected to rise. The two organisations choose the books together, then NBCS produces the Giant Print books in 24 point type. Working together means more children's books reach more partially sighted young people at no cost to them.

www.nlb-online.org

- Decide at the outset how you will manage any dispute between partners. There are costs to mediation – the golden rule is for organisations to keep talking so that they avoid making the assumptions that could lead to more serious problems.

Centre for Effective Dispute Resolution www.cedr.co.uk

Public relations

There may be a case for publicising that you are working collaboratively, although service users and the wider public are likely to be concerned only about the quality of the outcomes that collaboration achieves.

Such publicity can:

- demonstrate the efficiency of your joint use of donations or funding
- diminish concerns about duplication of activities within the sector
- give funders and policy makers the message that you are putting beneficiary interests above organisational profile
- signal to other organisations that the partner organisations are willing to and good at working in partnership
- support organisational buy-in to the project from staff, volunteers and other stakeholders – promoting ‘quick wins’ motivates people as everyone wants to be part of success
- alert funders to the benefits of collaborative working, perhaps opening up future funding opportunities

However, issues around publicity and branding can arouse strong feelings so they need sensitive handling. Joint projects have faltered over which organisation’s name comes first in a press release.

A joint project may be seen as ‘owned’ by some partner organisations more than others, perhaps where organisations vary in their degree of operational involvement or financial investment or where one partner is already well-known.

From the beginning, it is wise to agree a joint branding policy that is consistent and fair. Getting this agreement in writing and securing commitment to it reduces the likelihood of action which might later cause conflict. In a large organisation where some staff may not be aware that a project is collaborative, this document can also guide how they present it externally.

- Does your organisation have brand-sharing guidance to be consulted?
- Will organisations’ names, logos or descriptions always appear in the same order in publicity material? Will they alternate?
- Or will you create a brand for your joint work, as South London CVS Partnership has done (see case study)? Bear in mind that an additional brand in your subsector may be competing against your organisation’s own brand.
- Which groups are your priority audience for publicity? Consider the general public, the media and other organisations.

Reviewing joint work

Beneficiaries do not have to be aware that an activity is being delivered in partnership for the partnership to be successful. Regular reviews and users' feedback can help measure its impact.

- Is your partnership achieving its objectives?
- Are you achieving more by working collaboratively than by working alone?
- What has gone well? What has gone less well?
- Has your partnership or its activities changed since it began – do you need to make adjustments to how you work together?
- Do all the partners still have shared aims?

Whatever changes partners may suggest, keep in mind why your organisation got involved in the first place and what will enable you to obtain the best outcome for *your* beneficiaries.

Structures for joint projects

Each organisation can maintain its own identity or partners can together create new organisations to run activities. The following points outline these options, but do not provide a comprehensive guide. Different structures are right for different organisations depending on their aims for the collaboration. Professional advice should help work out what is best in each case.

Joint working

Two or more separate organisations work together, but each organisation maintains its independence and its own identity.

- The level of board and senior management involvement will vary with the scale of the collaboration and the type of organisations involved.
- Trustees have final responsibility for the activities of their organisation, including collaborative working arrangements.
- Boards of trustees may co-operate to oversee the collaboration for its duration. This could be by forming a joint committee with representatives from each board. Boards of trustees can agree a code of conduct to formalise how they will work together.
- Or trustees may approve the collaboration, then delegate its implementation to a steering group of staff from each organisation with a project co-ordinator reporting back to this staff group.
- The collaboration can be controlled by a written agreement which separates the joint functions from the ongoing operations of each partner.

New organisation

Two or more organisations create a separate organisation to run activities for beneficiaries.

- Each original organisation maintains its own identity distinct from the identity created for the new organisation.
- The new organisation is a legal entity in its own right. Its legal structure will vary. It may, for instance, be a registered charity as well as a company limited by guarantee, but there are many other options for the new organisation's structure.

- The original organisations may share the governance of the new organisation. In this case, the new organisation has its own separate board with each partner having an agreed number of seats on it.
- Another option is for one person to represent all the partner organisations on the board of the new organisation. The degree of influence the partners wish to have in the new organisation will determine which option is chosen.
- Where organisations' right to influence the running of the new organisation is not formalised by the governance arrangements, alternative mechanisms will usually be built into a written agreement.

Why create a new voluntary organisation?

Some organisations set up new organisations so that they can separate the collaborative working element from the continuing activities of each partner. This may be appropriate where there are significant financial or liability risks involved in starting new joint work.

Creating a separate organisation formalises the way that the shared work is managed, meaning that none of the partners should benefit unfairly from the advantages or suffer disproportionately from the disadvantages possible when sharing services.

C A S E S T U D Y

South London CVS Partnership

South London CVS Partnership covers Bromley, Croydon, Kingston-upon-Thames, Merton, Richmond upon Thames and Sutton. The Directors of the six Councils for Voluntary Service from these boroughs are responsible for its governance.

The Association of London Government provides core funding for the Partnership's three core staff and Richmond CVS (RCVS) employs them on behalf of the six CVSs

Identity & communication

The staff were initially based at RCVS, but now work from an independent office, albeit in a building managed by RCVS. The move has emphasised the Partnership's neutrality and independence, particularly as it now has its own website and its email addresses are @slcvspartnership rather than @richmondcvss.

"The move improved our ability to create an identity for the Partnership which has been very valuable. It sends the message that the Partnership is there for all the partners. We have to constantly review how we communicate with CVSs and their trustees about our work. We currently rely a lot on individual CVS Directors providing this communication role locally."

Jacqui Finn, Partnership Manager, South London CVS Partnership

www.slcvspartnership.org.uk



Further advice and support

Collaborative Working Unit

email collaborate@ncvo-vol.org.uk
telephone 020 7520 2440
www.ncvo-vol.org.uk/collaborate

Charity Commission contact centre

telephone 0870 333 0123
email enquiries@charitycommission.gsi.gov.uk
www.charitycommission.gov.uk

NCVO's HelpDesk

telephone 0800 2 798 798
textphone 0800 01 88 111
email helpdesk@askncvo.org.uk

Local support

Councils for Voluntary Service www.nacvs.org.uk/cvsdir
Rural Community Councils www.acre.org.uk/rcclinks.htm

Disclaimer

NCVO cannot accept liability arising from reliance on this information. It is for guidance only and should not replace legal advice.

Picture credits: Volunteering England/Anne Misselwitz & Chalky Whyte and BTCV/Alan Atkinson

NCVO's CWU

The Collaborative Working Unit offers information and advice to help voluntary and community organisations make decisions about whether and how to work collaboratively. It serves the managers and trustees of voluntary organisations and infrastructure bodies as well as engaging with funders and policy makers.

Collaborative Working Unit

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