



Brothers of Charity Services

Working in Partnership for Positive Lives - in Merseyside and Greater Manchester.



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Commissioning and Tendering: Adding Organisational Value in Challenging Times.



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INTRODUCTION



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CHANGING TIMES - CHANGING RELATIONSHIPS



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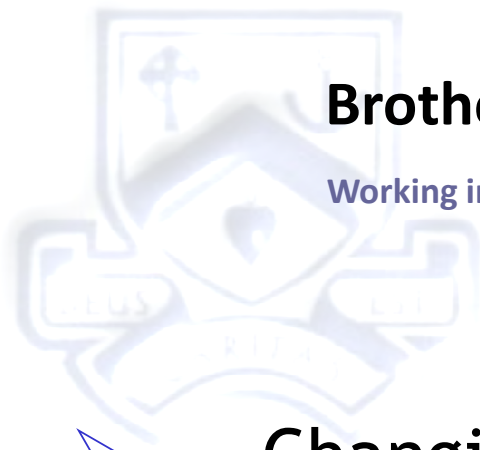
- Traditional Key Partnership Role of the Third Sector.
- Importance of Grant funding for the Third Sector.



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- Changes in Funding Relationships for the Third Sector.
- Drivers for Change - challenging contemporary global, national and local economic and demographic factors.



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- Changing national priorities and policies.
- Greater competition for resources.
- Consistently higher expectations and demands from stakeholders.
- Increasingly complex financial and political operating environments.



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- Competitive Tendering as a procurement tool has emerged to become the commissioning method of choice.
- The idea behind competitive tendering is that it forces social care providers to compete and consequently the purchaser will gain better value for money.



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Case Study: Impact and Rate of Change of Competitive Tendering:



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Brothers of Charity Services Merseyside:

Four Years ago: 100% Grant Funded / 0% Contract Funded

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Now: 0% Grant Funded / 100% Contract Funded



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- Whilst competitive tendering is, in theory, a very effective way to resolve the issues facing commissioners.
- Tendering can also unavoidably bring significant challenges to existing organisational cultures.



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Case Study: Impact and Rate of Change of Competitive Tendering:



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Challenges on our Ethos, Visions and Values.

Challenges to our relationship with the people we support.



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Challenges to our relationship with our staff.

Challenges to our relationship with our commissioners.



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Case Study: Pressures during and after Competitive Tendering:



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- **Tender - Enforced Commissioner change in costed rates.**
- **Tender - Enforced Commissioner change in contract rates.**



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CHANGING TIMES - CHANGING RELATIONSHIPS

Conclusion.



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- **In times of Great Change and Challenge:**

The threat to the stability and sustainability of organisations

- **These Volatile and Challenging Factors:**

Real Threat or Real Opportunity!



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- **Embracing Challenge Through
Positive Organisational Responses:**

A compelling vision for building
our value to positively meet our
challenges.



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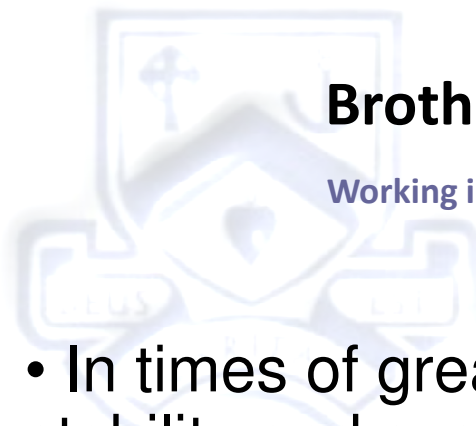
CHANGING TIMES - CHANGING OURSELVES



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Over the last 3 years we have successfully met a wide range of environmental challenges whilst effectively securing and growing delivery of organisational outcomes in the face of recession and austerity, which in themselves, have taught us the essential need to be able to drive and illustrate how we can add value to the emerging world of increased competition and scarce resources.



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- In times of great change and challenge the threat to the stability and sustainability of previously well established and well managed organisations, can pose fundamental questions to the basic ability of an organisation to stay in existence and keep producing the valuable outcomes it does.
- These factors provoked a need to identify, develop and deploy suitable value development strategies delivered through far more effective utilisation of mainstream commercial and business development tools as a central strategic response.



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Case Study: Changing Times - Changing Ourselves



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- Learning to Articulate Value.
- Understanding our place and influence in this new commissioning environment as being measured and defined by the positive outcomes and value we generate



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- Value growth strategy as a positive strategic response to a myriad of threats.
- Example: Market growth and Diversification.



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- **Strengthening Visions and Values
through Development**



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Changing Times - Evolving Our Value.



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Evolving Our Value -

Case Study: Strategic Priorities 2011 to 2016



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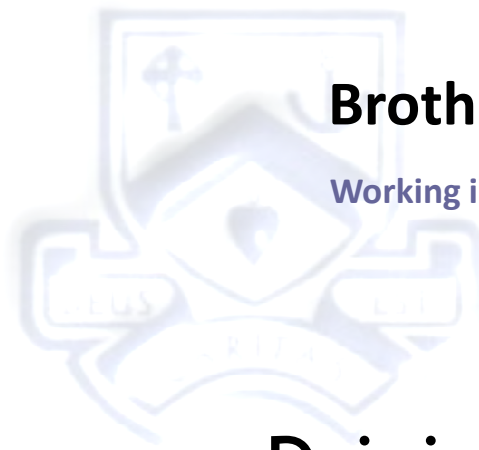
In linking effective strategic planning action to maximise the performance of delivered outcomes for our stakeholders the following strategic priorities have been identified and designed to ensure we continue to evolve and align the Service to our developing operational environment whilst ensuring we reconcile the shared values and vision of the Brothers of Charity Services with the organisational capacities and capabilities of an enterprising, effective and forward facing local and regional Service.



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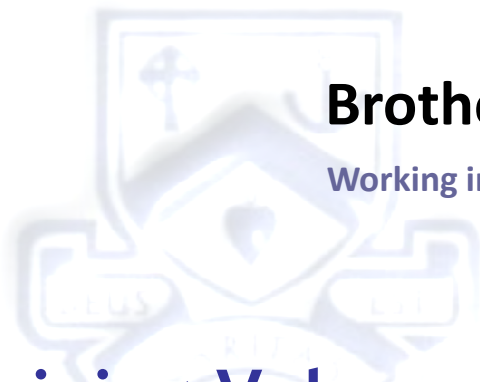
- ✓ Promoting Dignity.
- ✓ Building and Communicating Positive Relationships.
- ✓ Engaging and Supporting Marginalised People.
- ✓ Focussing on Person Centredness.
- ✓ Ensuring Financial Sustainability.
- ✓ Generating Opportunity through Enterprise.
- ✓ Developing Services.
- ✓ Positively developing our people and processes.



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- Driving Practical Value - Aligning strategic objectives and delivery to drive value.
- Driving Practical Value - the link between strategic priorities and operational delivery.



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Driving Values - Strategic Priorities:

- ✓ **People Strategy - The Learning Organisation & Workforce Development.**
- ✓ **Communicating our Message to our Stakeholders**
- ✓ **Developing our Services - Service Development**
- ✓ **Engagement and Relationship Strategy**



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Driving Values - Strategic Priorities:

- ✓ Economic Capital and Finance Strategy
- ✓ Systems and Web Technology Development
- ✓ Partnership and Consortia Development
- ✓ Structural Development



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Evolving Our Value Case Study:

**People Strategy - The Learning Organisation &
Workforce Development**

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People Strategy - The Learning Organisation and Workforce Development Strategic Objectives:

- Enabling integrated learning organisation cultures.
- Workforce Development - delivering a culture of learning and transformation.



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- **Continuous Organisational Learning.**
- **Performance Management Systems.**
- **Growing Effective Leadership .**



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- Commitment at all levels to fostering an aspirational learning environment.
- Learning needs to be part of a positive experience of all staff.



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To achieve this, the Service must develop, evolve and fully integrate our strategies, skills, systems and shared values to help the workforce to continually improve what they do and clearly deliver value for our stakeholders.



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As such the development of the strategic priority to develop a Learning Environment and more effective and supporting Workforce Development plans will assist in transforming our organisational skills to more effectively support our profile as a positive and sustainable Service operating as effectively as possible for all our stakeholders in very challenging times.



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Evolving Our Value Case Study:

**Communicating our Message to our Stakeholders -
Marketing Strategic Objectives.**



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Marketing Strategic Priorities 2011 / 2016.

- ❖ Effective marketing strategies for the Service provide a clear and effective voice to communicate the visions and values, quality and value of our Services locally and regionally.
- ❖ Utilised well it can develop greater external and internal perceptions and understanding to all our stakeholders of our shared values and the value, quality and diversity of our services.
- ❖ Consequently effective marketing for the Service produces a variety of positive outcomes across social and economic areas and its potential value is great in terms of effective, co-ordinated and cohesive internal and external communication.



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Marketing Strategic Priorities 2011 / 2016.

- ❖ Continue to develop the marketing capacity of the service
- ❖ Continue to develop our use of marketing is as a communication and engagement tool to support social and economic engagement and growth.
- ❖ Develop Customer Relationship Management systems to identify local, sub-regional and regional development opportunities



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Marketing Strategic Priorities 2011 / 2016.

- ❖ **Expand Marketing Mix to include business development objectives.**
- ❖ **Continue to positively Develop New Marketing Strategies**
- ❖ **Internal marketing strategies:**

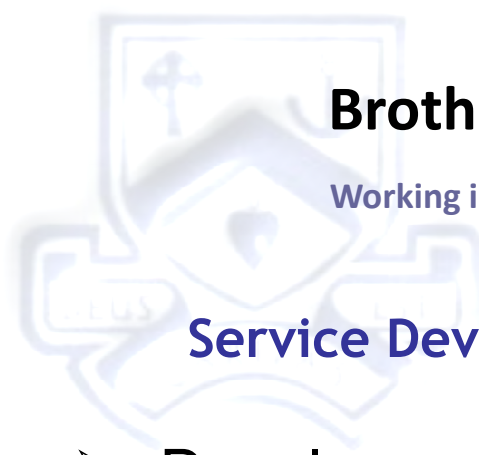


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Evolving Our Value Case Study:

**Developing our Services - Service
Development Strategic Objectives.**



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Service Development Strategic Priorities 2011 / 2016.

- Develop service models to become truly personalised.
- Focus on delivery models that are holistic in nature.
- Service Development should look to positively support Plurality and Partnership Working.
- Dignity and Respect is a fundamental aspect of delivered services.



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Service Development Strategic Priorities 2011 / 2016.

- Productivity in Service Development - Quality and Innovation.
- Our Staff – Understanding future workforce issues.
- Expand engagement and delivery of services to more diverse sections of the community.
- Continue to develop existing service delivery models.



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Service Development Strategic Priorities 2011 / 2016.

- Develop new service options.
- Develop new service options such as Health and Wellbeing Services.
- Develop a community hub – drawing in and influencing community value and engagement.
- Ensure compliance of key CQC, local contractual or other commissioner compliance regimes.



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Evolving Our Value Case Study:

**Engagement and Relationship Strategy -
Business Development Objectives.**



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Engagement and Relationship Strategic Priorities 2011/2016.

- o Core and new markets - positioning, development and harvesting of markets.
- o Price decline and cost inflation.
- o Diversification.



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Engagement and Relationship Strategic Priorities 2011/2016.

- o Ensure Quality Standards.
- o Ensure Stakeholder Satisfaction.
- o Core market opportunities.
- o Captured market opportunities.



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Evolving Our Value Case Study: Social Capital Development.



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Social Capital Development Strategic Priorities

- ☐ Services that develop a focus on bonding, bridging and linking the delivery of our services with the generation of positive social outcomes.
- ☐ Social capital generation and outcomes - community initiatives programme
- ☐ Community Development - building effective partnerships.



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Social Capital Development Strategic Priorities

- ❑ **Faiths for Change** - Food for Schools Programme / Community Environmental Awareness Initiative.
- ❑ **Hindu Temple** - Multi Faith Partnering / Community Environmental Regeneration Initiative.
- ❑ **Ephrata Bethlehem Church** - Multi-Faith Partnering / Community Environmental Regeneration Initiative.
- ❑ **Princess Road Synagogue** initiative with the Jewish community.
- ❑ **Barclaycard Partnering** - Volunteers from Barclaycard and service users partner to work on community environmental and Wellbeing events.
- ❑ **Lark Lane Residents Association / Big Tidy Up** - Community Environmental Action.
- ❑ **Dovecote Art Workshops**: Community led Art Workshops Dovecote Photographic Workshops.
- ❑ **Crass Roots** - Shedding Project.
- ❑ **Breakaway Holidays / Go 4 It....** - Flexible Respite Service.



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Social Capital - Social Enterprise

- ☐ Social enterprise and supported employment.

The main outcomes for the enterprise models would be:

Provide meaningful, rewarding and contemporary learning and skills to support the progression to work;

Develop the service model to become less reliant on public funding and more self determining;

Promote longer term, sustainable service delivery model with added value outcomes.

By using business model solutions combined into a social objective vehicle it is hoped we can encourage enterprise in people with a learning disability and thereon contribute and generate far wider social outcomes and play our part in developing the concept of the Big Society going forward.



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Evolving Our Value Case Study:

Economic Capital and Finance Strategy

The logo of Brothers of Charity Services is a shield-shaped crest. It features a cross at the top, a stylized house or mountain shape in the center, and a banner at the bottom with the text 'SPLENDOR'.

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Economic Capital Development Strategy 2011 / 2016.

- Economic Capital - Commercial performance objectives.
- Continue new market development, relationship management and diversification strategy.
- Effective profile and web marketing strategies.
- Continue core market development and harvesting.
- Continue to develop service type and delivery capacities to align and track existing and developing markets.



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Finance Strategy 2011 / 2016.

- Margin orientated Business Model.
- Increase Turnover through effective business and service development.
- Increase contribution of service related surplus to support wider work of Brothers of Charity internationally.
- Targeting organisational inefficiency and ineffectiveness.
- Assess, manage and mitigate the effect of fragmented revenue streams.
- Cost Control through effective performance management and tight budgetary control.
- Increase effective Asset Management and Return.



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Evolving Our Value Case Study:

Systems and Web Technology Development



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Systems and Web Technology Development

The development of cohesive and supportive IT, communications and web systems.

The strategic use of IT and communications systems to generate economies of scale as well organisational co-ordination and effectiveness illustrates the importance of a cohesive planning and delivery strategy for local as well as regional System and Web application design.

The logo for Brothers of Charity Services is located in the top left corner. It features a shield with a cross and a heart, with the text 'Brothers of Charity' and 'Services' around it.

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Systems and Web Technology Development

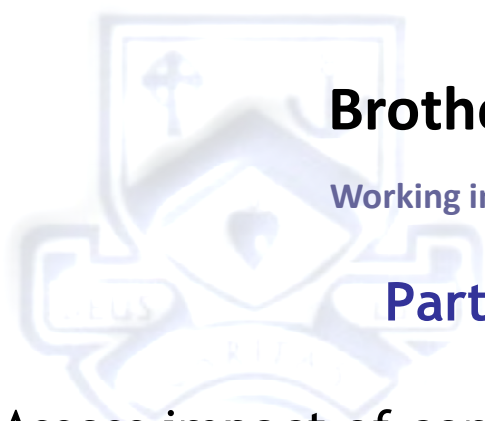
- ✓ Continued development of a web based IT and Communications web based network infrastructure designed to support and promote local, sub-regional and regional scale service development.
- ✓ Continued development of Regional IT and Communications hub.
- ✓ Mobile working technology to continue to be developed in order to support more personalised and fragmented service delivery.
- ✓ Reduction in reliance on physical office 'hubs' with mobile telecommunications and technology being utilised and integrated into web based regional IT infrastructures providing virtual office / cloud support.
- ✓ Continued development of local, sub-regional and regional scale Management Information Systems and supporting infrastructure.
- ✓ Completion of Phase 1 BOCS MIS - Sage Finance, Sage Payroll, Sage HR, Sage Business Intelligence and Sage Customer Relationship Management applications.



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Evolving Our Value Case Study: Partnership and Consortia Development



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Partnership and Consortia Development

- ❖ Assess impact of competitive market on new opportunities for partnership and consortia development.
- ❖ Develop local network opportunities for community development.
- ❖ Align developing partnership opportunities to potential consortia partners.
- ❖ Manage 'Risk to reputation' factors in prospective partnerships and consortia.
- ❖ Ensure we maximise partnership opportunities to both generate more cross sector working but also manage risk to reputation issues.

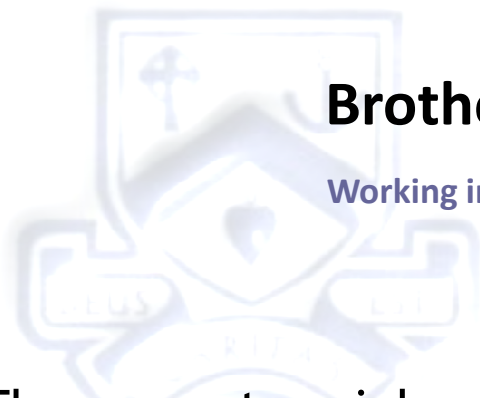


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Evolving Our Value Case Study:

Structural Development.



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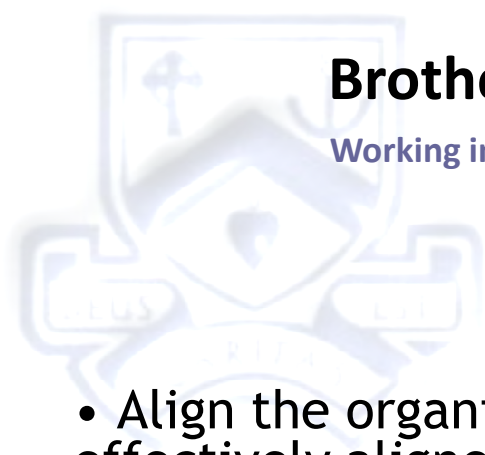
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Structural Development

The current social care market is becoming more diverse geographically and more fragmented in terms of the variety and periods that support will be delivered. Service providers who can offer 'life cycle' service provision,

i.e. a wide variety of demand led service options from floating support to nursing care, from residential services to community access and from day services to supported employment and beyond will become providers of choice with a wide variety of commissioners.

As such, with a need for far more effective and cohesive service delivery that is outcome, not service led, that we need to assess if our current structures are appropriate, supportive and flexible enough to align with our changing service environment.



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Structural Development

- Align the organisations structure to a future facing service more effectively aligned to its stakeholders and operating environment.
- The evolution of the organisation must look to its values and vision, strategy, culture and structure to define its fit and purpose in new and changing operating environments.
- Service outcomes, stakeholder expectations and financial constraint factors must also be supported by a properly aligned organisational structure.
- Review of the appropriateness of current legal as well as organisational structures in order to assess the best regulatory fit.



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Structural Development

Effective and supportive organisational structures can support the production of organisational value through maximising effective outcomes, staff creativity and innovation and financial sustainability.



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CONCLUSION.



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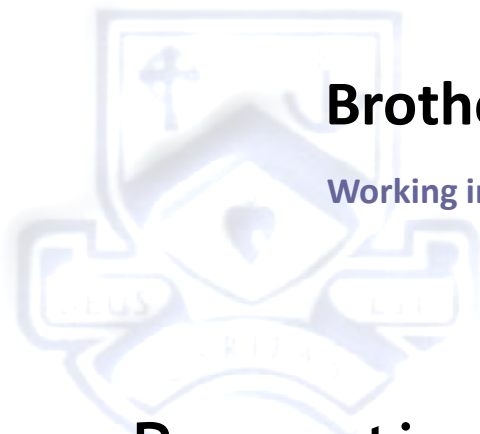
- The Quantum Leap in social care commissioning policy and tactics poses clear risks and challenges for the viability and general future of adult social care providers in the Third Sector.
- It's a Fundamental Challenge - but also an unprecedented opportunity.



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- Accept that Change and Challenge is unavoidable in the current economic cycle - the way we respond is absolutely key.
- Positive Organisational Responses - Meeting Challenge through Value Development.



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- Respecting, Strengthening and Promoting Visions, Values and the Mission Statement through integrated strategic planning and action.
- Finally - Understanding the clear and special value of our Third Sector contribution and the key part it plays in ours and our stakeholders future.



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