

## **APPENDIX 1**

### **Terms of Reference for the development of the Merton Partnerships Voluntary Sector and Volunteering Strategy.**

The Merton Partnership has agreed the need to refresh and merge the Voluntary Sector and Volunteering Strategy to ensure they are relevant and reflective of the current climate. A steering group drawn from members of the Merton Partnership has been set up to oversee the development of the new Strategy that:

- Sets out the partner priorities for the sector and the resources available
- Sustains a thriving and dynamic sector by equipping them with the skills and support needed to adapt to the new climate
- Acknowledges and builds on the sector's social value in Merton.

### **Background**

Merton has a vibrant and active voluntary and community sector working across a multitude of areas. The VCS in Merton is a strong asset for the borough providing a range of services particularly to vulnerable citizens, enhances community cohesion, contributes to wellbeing and enhances the skills of volunteering.

The sector and the Merton Partnership have a strong and mutually supportive relationship. A number of members of the Merton Partnership support the sector through substantial grants, commissioned services, notional funding and business rate discounts. However, it should be recognised that the sector draws substantial resources from other sources, in particular unpaid volunteers.

The shrinking state, cuts to public sector funding, challenges to the reputation and trust in which the voluntary sector is held and growing demand and the complexity of needs of the users have propelled the need to review and evolve the relationship between the funders, stakeholders and the voluntary sector.

In grappling with the financial and demographic challenges of the moment, commissioners are not only rationing resources, but increasingly changing the way they work with many looking at shared services or commissioning cross-borough working.

### **Terms of Reference**

The issues that the Steering Group will investigate in developing a new Voluntary Sector and Volunteering Strategy are set out below. However, these may be amended and added to as the work of the Group proceeds.

### **The Strategy and Policy**

- An understanding of the voluntary sector profile, its diversity, scope and scale.
- What should be the objectives and priorities for the Voluntary Sector and Volunteering strategy 2016 -19?
- How might the relationship between the VCS and partners need to evolve?

- How can we increase the number, diversity and quality of volunteering opportunities and recognise the impact and value of volunteering in the local communities
- Can we use the Social Value Act 2011 more effectively to deliver value for money, recognise the expertise and skills of the sector and maximise social value in Merton? What steps are necessary to ensure the CVS is ready to access such opportunities?

### **Funding and Finance**

- What level of resources might be available to achieve these objectives and how might this impact on grants, commissioned grants and contracts?
- How would the VCS need to adapt as resources reduce and priorities change?
- Are there other opportunities to access funding or generate income e.g. from other grant giving bodies, social investment, local businesses and citizens, charging for services and products?

### **Operations and Activities**

- What support might the VCS need to adapt to new priorities and funding?
- Are there opportunities for the VCS to provide services that the council no longer provides?
- Can commissioners do more to involve the VCS in the commissioning process and increase the opportunities for VCS organizations to bid for contracts?

### **Methodology**

Writing the strategy will require developing a clear understanding of the local and national context and the challenges and opportunities it presents. The strategy will be informed by a number of research methods including:

- Interviews and workshops with key stakeholders of the borough to gain an understanding of their needs, challenges and priorities
- A consultation and engagement exercise to inform the strategy priorities
- A review of national and international best practice approaches and think-tank studies related to the VCS workings and evolution
- An examination of national policy developments in this area
- A literature review of relevant strategic documents of each partner to ensure priority alignment and strategy coherence
- An analysis of key demographic changes and their impact on demand alongside the services provided by the sector.

- The type and amounts of funding currently provided to the sector e.g. notional funding, grants, business rate discounts
- Understanding and exploring the role and benefits of community assets and reviewing existing policy
- The current state of the VCS in Merton with details such numbers of employees, volunteers, outputs, turnover and sources of funding
- Mapping the types and scale of activities undertaken by the VCS against future priorities
- Understanding the scale and type of volunteering activities in the borough
- Best practice examples from other organisations, including successful corporate social responsibility relationships and innovative income-generation methods
- Establishing the resources available to the sector from the Council and the CCG
- An understanding of alternative funding sources available and their priorities

**Timescales:**

The group will meet on a monthly basis and will provide a draft strategy by November 2016 to allow recommendations to be considered as part of the budget-setting priorities for 2017/18 and beyond.

A draft strategy will be considered by the Merton Partnership Executive Board in November 2016.

Over the coming weeks, the board will proceed through the following stages to write the strategy:

1. Research
2. Engagement
3. Evaluation
4. Agreement and drafting of priorities
5. Consultation
6. Presentation to MPEB
7. Agreement of other governance bodies as appropriate
8. Amendments and final drafting of strategy

**Steering Group Membership:**

Simon Williams, LBM (Chair)

Dagmar Zeuner, LBM

Paul Ballatt, LBM

Cynthai Cardoza, CCG

Anne Hoblyn, Job Centre Plus

Khadiru Mahdi, MVSC

Sarah Hannigan, MVSC

Hayley James, Citizens Advice Bureau

Hannah Neal, BAME Voice

Diana Sterck, Merton Chamber of Commerce

Jane Bolton, Merton Priory Homes

Jacqueline Sims, Police

Julian Spooner, Fire Service

Sue Rimmer, South Thames College

Naomi Martin, Commonsense Trust

Secretariat – John Dimmer and Amjad Agil, LBM.