



Regional survey report Oct 24

Overview:

From discussions at the weekly peer group calls it was agreed that regional approaches are an issue that needs further consideration. It relates to:

1. funding bids (especially in the world of Integrated Care Systems) ;
2. helping each other through our ideas on hubs and spokes to cut out duplication and protect local services up and down the country;
3. decision making within CA - to make sure that we are a network that evolves and does not get stuck in a situation where we are losing ground in the market place of information and advice givers.

With these concepts in mind, we carried out a survey to establish who is already working in partnership, what works well and what needs tweaking etc so that there is a data base of information to assist us all in developing in the most appropriate way for our LCA. This survey also covered barriers to partnership working so that we can consider together ways to overcome those barriers where the sustainability of the service will be best served by doing this.

Here are the findings:

- 30 LCAs contributed
- All of us bar one are currently working in partnerships¹
- 80+% of us are working with both formal and informal partnerships with more of us using informal than formal ones (6% more)
- 70% of us would support regional structures to speed up decision making with 3 of us saying we wouldn't support this and 5 of us undecided about the idea

Formal partnerships - what works well:

We are able to work with each other to fill staff gaps to ensure the project doesn't fall off the cliff if one area is having difficulty recruiting. Prior to merger in Central Notts we had a number of shared paid staff roles across LCAs which worked really well and did then eventually lead to a really smooth merger.

The ability to find funding for projects across the county of Hampshire

Funding flows, referral is easier, more of a peer group to call on

Having structure means clear rules

¹ One indicated that they weren't working in partnership and then gave info on a non regional partnership so their data is also included here as the dataset will cover all forms of partner working. Wokingham partnerships seem to have lapsed during interim CEO tenure



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Funding to deliver advice, targets are not onerous. For Crisis, reporting is done through Tableau so no heavy burden on monitoring and reporting.

Joint bidding but still young so not getting to the interesting stuff on shared costs and services yet.

Arrangement with MK CEO for emergency absence cover is comforting. Shared CO role with Mid Beds is saving costs and efficient, as well as excellent peer support experience for both offices.

Clear relationships and expectations along with a formalised partnership agreement

a written statement outlines each partner's responsibility and accountability

Collaboration, sharing of resources, knowledge and skills; support at challenging times

Shares the load in terms of delivery, reporting etc. Can offer more advice and support to clients across a larger geographical area and reduces adviser/client travelling time and expenses. Brings local CA services together and aligns service delivery, enables sharing of good practice, gives a stronger voice for renegotiating funding. Reduces administration costs and allows more money to be spent on advice delivery and clients

Information sharing ; bid collaboration; joint service delivery

Connections with other key groups and officers. The Hampshire consortium is going through a difficult time at the moment, with few meaningful benefits to members. Council partnership is good for the money and also a strong R&C connection for us that has resulted in changes to council policy.

Currently nothing but has huge potential with changes.

joint projects, shared learning

Trust; respect; mutual understanding of LCA challenges

Informal partnerships - what works well:

We are currently in a larger group now we have a new Mayoral authority, this covers Derbyshire & Nottinghamshire (city and county) . This is fairly new and finding its feet so we can influence and make the case for funding projects linked to the UKSP or further monies coming from the devolution deal.

Sharing of good practice

Flexibility and responsiveness - we can get things done quickly

Funding flows, referral is easier, more of a peer group to call on

Working together for the benefit of residents

Excellent for peer support and sharing of good practice. Relationship of trust built up through regular meeting attendance (monthly).



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Information exchange, networking, leads to formal partnership opportunities.
Clear purposes for building relationships and clarification of expectations and limitations.
very flexible
Sharing good practice, support and mentoring, sharing training opportunities and resources, connectivity of local services and awareness of what we all do
Information sharing; training; service development
Team work, sharing of best practice
Again, the connections more than anything else.
it keeps communications open and the central gathering of reporting data
flexibility, independence, shared working, joint projects
All successful work is based on trust and strong relationships which takes time to create
Sharing of values, peer support

Things that don't work well in formal partnerships and how this could be addressed were noted as:

I think some frustration lies in we could do more as a partnership and be more innovative. Problem is we are so busy running individual LCAs we don't get time to think how this could work. More back office shared roles or resources could be one thing. We really favour partnerships and would work with any where we can see a value and benefit for clients and our business. We work closely for example with Nottinghamshire Mind and have various partnerships and joint funding with them. we have proved with the previous shared paid roles and then the merger that we can still protect our districts and local authority funding whilst being big when we need to be.
We are not always clear about the delivery model when we take on new projects, which at times has led to dis trust by some members of the consortium
Justice funding through consortium of non-CA charities is not preferable as we have little control; CA consortium preferable but some LCAs were felt to be slow and difficult in some cases
Crisis subcontract has been difficult - after 6 months we still don't have an agreed contract and the draft is extensive and heavy on legal aspects. Funds take time to come through, delayed because going through a third party (the subcontractor).
We need to start working on shared costs and shared services due to the v high cost of all services in London and the recruitment and retention challenges
Not all LCAs have same standards nor the same approach - we discovered we were assisting an office with one function as a favour when in fact they were being paid for it. Too much to say here - happy to have a discussion
The partnership agreement is not strong enough to manage complex situations or under performance.



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not come across any

Difference in size and finances amongst LCAs can be challenging but we are working hard at building support and trust to overcome that

More work for the lead partner as they tend to have a bigger proportion of the administration and responsibility for reporting, aligning service delivery across different charities (both can be overcome with effective communication)

Competing for CA national funding; trust

Issues with the consortium are long and controversial. It is difficult to provide constructive feedback at the moment as one of the major issues is the opaque nature of how it operates, which means that the most valuable activities are often undertaken by direct connection to other offices (which doesn't necessarily require a consortium).

We need a partnership agreement (not just subcontracts) that details we are all equal partners and will share out the lead roles on various projects / opportunities / bids so we all benefit and there is not a dictatorship. There needs to be consultation and agreements on things around reporting requirements and timeframes, role of staff employed to support the partnership, transparency, agreements about the use of other organisations data and information (i.e. what it is used for, accrediting it to the organisation, not using it without agreement of the organisation who's data it is). Respect of boundaries and locations / areas of delivery. etc...

Issues around salaries for staff and more discussions required before a bid is submitted, allowing for more input and reducing the risk of issues further down the line.

Things that don't work well in informal partnerships and what we could do to address this were noted as:

Pilots, also being of one "Citizens Advice" voice across the region. R&C is good too

In Lancashire there are not regular meetings with other CEOs and it would be helpful if we had a formal structure that got us together more regularly, I think

Gaps in meeting attendance, not everyone is committed to joining the meetings and this can weaken the partnership.

see above. Learned a lot and would still always try and partner, but have a very low threshold for LCAs who behave with a lack of integrity

There is no clear direction or buy in from the majority of the group. There is no formal support to administer the group which is quite onerous

not come across any - each method has its place

Sometimes motivation to work together can change, particularly if there is a change in personnel

Can be a drain on resources and time as organisation and admin is shared, not sufficient centralised admin support, slow progress at times as all organisations have their own focus/agendas



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We aren't all the same, so sometimes have different goals, which can be tricky to negotiate

Variable quality of interactions - sometimes can be a time drain, but overall, you need to keep putting in the effort, even when it's not immediately fruitful, for these things to work long-term.

Imbalance of power and therefore communication. needs a reset but was set up to report on a single project. Now needs to reflect a more proactive and multi project environment

not really due to better communications,

Turn over of CEO's; some CEO's not prioritising meeting up; not investing in relationships

Everyone who took the survey noted that they intend to work in partnerships in the future - there seems to be a clear understanding that we all need to do this to survive in the current operating environment.

Here are some of the embryonic plans we have in place already for future partnerships..

No formal structures planned although we wouldn't be against this if it is the right timing and for the right reasons.

We have bid for a project with CA Southampton

It would make sense for the who of the North East Mayor Authority area LCAs to speak and work with one voice. The Chairs of these LCAs have met but when the CEOs get involved it all seems to break down... It needs an impetus to sort this out.

I am approaching charities to merge and group as there are too many of us and we duplicate

Our ICB area is very large and the NHS keeps talking about 'working in partnership with the VCSFE' so between North Lancs, South Lakes, Carlisle and Eden and Barrow we are exploring ways of working together to see if this will help with NHS funding, but this is at a very embryonic stage.

The difficulty we have is that footprints change depending on areas - the local authority areas are different to the ICB areas which are different to counties - so it is not obvious who we would partner with and how. This is much easier somewhere like London or Liverpool - but in Lancashire / Cumbria it is not straightforward and not obvious. Commissioning areas are often different again from the boundaries above. This makes it tricky to be strategic about how we approach partnership working because it depends on who is commissioning and what the boundaries are.

Considering more formal collaboration and merger options with other Herts offices.

Just building on the work of the new consortium in London



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HMPPS funding, possible merger, increased partnership working
I am hoping to develop EMCAF further
A more formalised partnership across Wales LCAs
Regional delivery partnerships for large contracts; support services e.g comms and engagement; HR support; Finance Support. The development of an innovation hub
Wakefield and I are having preliminary meetings with WY Mayor.
Looking at greater regional working
Potential training partnership - currently in discussion with Basingstoke, West Berkshire and Reading LCAs. The idea is that we all keep our trainers, but co-ordinate a singular training plan and scheduled cohorts. The training is then spread out amongst the the trainers and the locations to free each trainer to do more work with staff and volunteers already working for us - e.g. up to 75% reduction of time spent on new intake training if the 4 of us are able to work together.
CAB only collaboration for the County
WAN - with changes or establishing an alternative group within Worcestershire if things do not improve. I am working in partnership with our local collaborative on a project - we are lead and they will form a sub group for the project. We are looking at being part of regional opportunities such as the Justice work.
devolution areas and mayorship opportunities for East Midlands. Discussion in place. Would definitely prefer informal structures, particularly over the first 2 years to see how things develop
Not at the stage to disclose at the moment
Potential energy contract - formal SLA

Footprints for partnership working were noted as:

I think there is talk of Leicestershire joining the Devolution Groups as well as Nottinghamshire & Derbyshire - it looks like there will be some joined up working there.
Hampshire and the south East/west
North East Mayoral Authority (so not including Tees Valley Mayoral Authority)
Our footprint is fine - Norfolk - c900k
Hertfordshire wide partnership would be ideal as it would benefit our East Herts residents - so covering the county of Hertfordshire popn 1.2m. But also closer working with Essex in the area covered by the ICB (Herts and West Essex).
Greater London
regional and sub regional depending on the funding source
Wales



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Cambridgeshire and Peterborough - 680,000 people to enable us to work in partnership but still focus on our key geographical area of focus we are funded for locally

Our footprint is England and Wales with a primary focus on the North West

Not bothered will work in any footprint.

If the above plan was to come together with all involved, it would cover the wider Loddon Valley region (not a formal region you'll find on a map). Roughly a triangle between Newbury, Basingstoke and Reading, with Tadley in the middle. Rough population total (served by the LCAs in these areas) is around 600,000

County (600,000 people)

East Midlands, Derbyshire, Lincolnshire, South Yorkshire - ie all neighbouring areas.

Already working across West Midlands

Regional representation for decision making:

1 of the people who said no to a regional decision making process noted that as independent charities we should all retain our own voice on issues of importance.

The 5 who were undecided said they would need to see the following things in place before they were persuaded:

How we would be consulted / informed / have input / choose who is part of the structure / how a minority voice may be heard and represented / how we ensure it is not the usual suspects / regular refresh of membership / not a simple majority rules (we exist to champion the marginalised and minorities let's maintain this principle within our own structures) / what decisions would they be making.....

More information about the structure and no pressure

Clear accountability, elected representatives that cover all types of offices. Two feedback mechanisms. Clear what the remit of the structure is, terms of reference, limits of decision making. Will it still be possible to have individual input in the case of something you feel particularly strongly about?

The following points were noted as possible barriers to getting regional representation in place;

We would be happy with a regional group to speed up decision making although not one group making decisions on our behalf which I think was one of the considerations. As long as our voice is heard and it is consultative. we would be happy with that.

I think we need to ensure that there is a mechanism for moving people on, so that it isn't the same people all the time, equally we need to ensure that it is dominated by the larger LCAs who have one eye on merger



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Lack of trust of those representing the areas - it needs to be someone independent of the LCAs. The whole Citizens Advice network structure does not allow decisions to be made unless everyone agrees - hence we never move forward.

There are also very different sizes/turnover LCAs in our area.

There are too many LCAs. Getting agreement from small organisations with little capacity and a 'battling' mentality to survive does not make commercial collaboration easy (if possible) at a county level, let alone a regional level. Regional collaboration would have to be completed under a fairly specific set of conditions which everyone signs up to - if you can't stick to it, your partners bounce you out. The lack of a CA-recognised footprint is also a major problem - if there were footprints, we'd have greater clarity, less friction and, probably, less LCAs. Just to note, I don't want just 20 LCAs across the country but more than one a county makes little sense.

I think we need to be very careful about what a 'region' is and how large it is. For example, the 'North West' is massive and contains an awful lot of complexity. There would need to be very good, well informed consultation on how things would be decided, because our patches are not straightforward. They also contain significant rural areas which are not the same as big cities (eg Manchester or Liverpool)

Need a clear competition protocol.

Some CEO's do not recognise the need for or the benefits on collective work. There are still LCA's who are operating on an every man for himself which may hamper this work

It works in many other organisations, and as long as diversity in the network is respected then it must just be made to work, or we are screwed

Trust - this is not a quick thing and will need time and commitment and transparency. Really good facilitation from someone who is an expert in this area but does not work for Citizens Advice will be key

Our charities are all slightly different and it would be difficult for one person/LCA to represent us as we all have different concerns, areas of focus etc. Historic issues relating to mergers. Think we need to build better working relationships on a regional level to build trust and communication first, I think it would be difficult in some areas to launch this now for this very reason. Size of some regions, what areas would be covered. How much would a regional representative be allowed to decide on behalf of others. Trustee Boards will be cautious and unsure about the lack of direct representation

Trust is a key issue. Deciding on the structure where all LCAs feel they have voice and influence. My suggestion is to divide England into 12 geographical areas with approximately 20 LCAs in each. They form a regional group / committee. Each regional group elects on representative to sit on a national panel which forms the democratically elected voice of the network. Reps convey the messages of their region to CA and are held accountable for this by the regional group. Criteria for being a national panel member would include attendance at the CEO Peer group. The elected national trustee board network reps would be drawn from this panel of 12 also. Panels and regional groups would have terms of reference.

No one LCA is well suited to representing others as there is too much vested interest and unconscious bias for each charity. We've seen this even with our consortium body, that has



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repeatedly displayed evidence of acting more in its own self interests than those of the consortium or our clients. This suggests that a more external body would be required, but this would need setting-up. It also creates an additional layer which adds expense. NACAB doesn't appear to be in the best position to enable this either. So, on the face of it, it's unclear how this might move forwards. However, I think it's still worth exploring with proper consideration.

trust, a sense that locally services will be lost (or control)

The relationships and trust won't be there initially and can't be forced. Would need time and forums to create that. Need to ensure that size is not a barrier to representation or voices being heard

Not a voting structure of who will be our representative - ie worried about person not sharing same values; work ethic; turn over. Need to be clearly voted on with representatives sharing their backgrounds, skills, why they want to do this, how they will communicate with wider partnership etc

In response to the question of whether people had anything else they wanted to share .. this is what was said ...

Clearly, my soapbox issue... Apparently we had 500+LCAs 15 years ago (?). There's a reason we don't now and we've yet to land on the number that is commercially or corporately efficient. The competition protocol doesn't work and needs swift revision to include footprint of operations.

And, when approached by a charity wanting to merge, we were stymied by a lack of formal merger guidelines from national. There is no written requirement on provisions of mergers with non-LCAs - meaning we don't know what we can do.

Both points are opaque because we didn't need to know before and it was easier not to address. With LCAs going out of business, it needs addressing now. Partnership and grouping will be difficult without this.

Regional working is complicated and not easy for our national charity to co-ordinate but actually if there were regional offices managed by national it might not be a terrible idea.

Lovely picture! Other than let's get on with it

One of my advisers recently achieved her SQE 1 exams in partnership with us. Hurrah!

If you're going to talk about regional working at the conference it would make sense to have someone from Wales to talk about what we are doing as I think we are probably more advanced than anywhere else due to our common funding in Wales

Our independence and locality matters. Regional structures need to work and be developed for certain things but let's not lose sight of our local power and importance alongside this.