

the
Digbeth
TRUST



**Strategic Plan
2007/08-
2009/10**

EXECUTIVE SUMMARY

February 2007

**Charity Number: 517343
Company Number: 1985299**

Foreword

For more than 20 years The Digbeth Trust has been providing specialist capacity building support to voluntary and community groups – helping them to realise their visions for themselves and their communities.

We have helped groups to find premises and funding, to undertake feasibility studies for buildings and land use, to develop new skills to increase their effectiveness and sustainability. We have built up a particular expertise in working with black and minority-ethnic led organisations and small community-based groups. As the independent evaluations of our work show, we deliver on our commitment to leave the groups we work with better able to meet the challenges facing them – and less in need of our services in the future.

In recent years we have begun offering a range of services to other organisations (for example NHS bodies and local authorities) to help them to support the voluntary and community sector in new and better ways. This has included administering grants programmes with built-in capacity-building elements and outposting our development workers into local regeneration initiatives.

In 2006 we launched a new initiative – our Professional and Technical Aid Service (PTAS). PTAS links voluntary and community organisations with quality-assured independent consultants who can give them targeted support when and where they need it.

We are also playing an increasing role in policy work to ensure the needs of the voluntary and community sector that we tackle on a daily basis are being addressed in the policies of others at a local and regional level.

As the needs analysis in this plan shows, we believe that the next 3 years will be a crucial time for the voluntary and community sector as it faces the opportunities and challenges of:

- Increasing expectations to “professionalise” in order to deliver more public sector services;
- A move away from grant-funding towards commissioning models;
- Changes in funding to the region from Europe and other major sources;
- Changes to the funding and configuration of capacity building services.

As a voluntary organisation ourselves we will also face these challenges and we are working to ensure we are ready.

For the next 3 years our key objective will be to continue to support the development of a diverse, influential, effective, independent, mutually supportive and sustainable voluntary and community sector across the West Midlands. To do this we will continue to provide high quality needs-led expert help to the sector and we will work to influence the policy and practice of others.

This plan sets out our work programme for how we will do this. It is also an invitation for anyone who shares our aims to contact us to see how we can work together to better meet the needs of voluntary and community based organisations across the West Midlands.

Eddie Currall
Chair
For The Digbeth Trust Board of Trustees

March 2007

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Strategic Plan - Executive Summary

1. Introduction:

The Digbeth Trust is an independent not-for-profit organisation (a charity and company limited by guarantee) which provides capacity building services to voluntary and community organisations (VCOs) across the West Midlands.

The Trust currently provides two main services:

1. development support to VCOs – including access to consultancy support for technical assistance (such as feasibility studies for buildings use and business planning)
2. administering a range of grant schemes for other funders.

In the past 12 months we have provided development support to more than 160 voluntary and community groups and administered grants programmes totalling more than £250,000. We have also worked on a range of policy initiatives to influence others to more effectively support the voluntary and community sector.

This business plan (covering the period 2007-2010) has at its core the Trust's mission to respond to the needs of voluntary and community organisations in Birmingham and the West Midlands. The plan sets out our priorities for action and describes the approaches we will use to meet our objectives.

2. Our Vision, Mission and Values - What the Trust Stands for:

The Digbeth Trust is a membership organisation with more than 20 years experience of supporting the development of the voluntary and community sector.

Our mission:

The Digbeth Trust exists to support the development of a diverse, influential, effective, independent, mutually supportive and sustainable voluntary and community sector across the West Midlands. To do this we will provide high quality needs-led expert help to the sector and influence the policy and practice of others.

Our vision for the Trust:

A dynamic, effective organisation that is a leading provider of high quality, independent, specialist support for voluntary and community organisations across the West Midlands.

Our vision for the Sector:

The Digbeth Trust's vision is of a diverse, influential, effective, independent, mutually supportive and sustainable voluntary and community sector which effectively supports the many communities of the West Midlands to achieve their full potential.

Our values

We Value:	We demonstrate this through:
Each other and those we work with	<ul style="list-style-type: none">• Offering respect, tolerance, mutuality of purpose, support and participation.• Tackling inequality and promoting social justice and inclusion.• Being accessible, easy to understand and fair.
Enabling and promoting the self-fulfilment of communities	Listening, responding, helping, resourcing, challenging and promoting the “thinking and planning” approach.
Quality in our work	“Thinking and planning” ourselves, being transparent and accountable, reflecting our stakeholders, striving for excellence, being open and responsive to challenges, being professional and independent.
Our mission	Consulting, reviewing and reflecting, and by recognising the unseen as well as the seen value in our work.

3. Our Key Assets:

3.1 Our Reputation:

In our 20 years of operation the Trust has acquired a very positive reputation both for the effectiveness of our work and for our approach. In particular we have a very positive reputation:

- amongst small groups and marginalised communities
- for working with groups to really understand their specific needs
- for developing tailored support and for doing what we promise.

3.2 Our Membership:

We are a membership organisation that is of, as well as for, the voluntary sector. We have more than 100 individuals and organisations in membership - ensuring the Trust is delivering its mission and who act as a source of expertise, intelligence and support to help us to do so.

3.3 Our People:

The Trust is led by a Board of Trustees and we aim to ensure that its membership reflects the Trust’s key stakeholders. Whilst stakeholder representation is vital, so is effective governance and strategic leadership. As part of our commitment to continual improvement, the Board undertakes skills audits and reviews to ensure that effective governance is practiced.

We have a small core staff team of the Chief Executive, Operations Manager, Administration and Support Officer, Development Officer and Finance Officer. This team has a wide range of skills and knowledge gained from previous work in the voluntary and community sector as well as for public sector organisations.

This core staff team is further enhanced by the sub-contracting of self-employed experienced consultants to lead on specific projects, reporting to the Chief Executive. This allows for maximum flexibility by recruiting resources only when and where they are required.

Volunteers provide administrative support to the staff team and receive a tailored personal development programme, following the guidance issued by Volunteering England.

The Trust ensures that it adheres to best practice in all human resources policies and procedures.

3.4 Our Knowledge and Experience:

Supplementing the wealth or knowledge, skills and experience of our staff, the Trust currently has three key databases:

- VCO Database: an electronic database of over 1700 VCOs across the West Midlands. This is used to ensure that information about our services and grant programmes is disseminated widely.
- Consultants Database: an electronic database of quality-assured consultants across the West Midlands (52 consultants as at February 2007). This is used to ensure that we can:
 - link VCOs and other organisations with high quality specialist consultant support;
 - access this externalised labour force for our own purposes on a flexible basis.
- Funders and Support Organisations: an electronic database used by the Trust to enable effective onward referral.

The Trust also has a library of resources produced during 20 years of supporting the voluntary and community sector.

4. Our Partners:

The Trust is committed to developing flexible services that meet the changing needs of the VCOs in our region, while at the same time ensuring that our work fits with developing national, regional and local policies. One of our key objectives is to capture knowledge of the environment in which VCOs operate in order to influence policy for the benefit of our members and of VCOs in general. To this end we work in partnership with other key organisations in and beyond the sector.

The Trust is a member of the Birmingham ChangeUp Steering Group and works with other capacity building and funding organisations such as West Midlands European Network, Birmingham Voluntary Service Council, Birmingham Community Empowerment Network, Birmingham Foundation, Birmingham Settlement, B.STRONG, and Co-enterprise.

The Trust is also a member of Regional Action West Midlands, Birmingham and Solihull Social Enterprise Consortium, the Association of Charitable Foundations, the Birmingham Voluntary Sector Chief Executives' Forum and the West Midlands

Charitable Trusts Group. One of our key aims over the next three years is to maintain and develop these and other targeted linkages and partnerships.

5. Our Services:

The Digbeth Trust is a development support organisation offering services to **voluntary and community organisations, public bodies (eg health service organisations) and statutory and charitable funders.**

For VCOs – our main stakeholders - the Trust currently offers a package of support services to help them to develop their organisation and / or activities - providing step by step practical, hands-on support tailor-made for each group. We currently offer two main services:

A. Development support to help groups through the process of refining their vision and determining the steps needed to achieve that vision. We provide this through:

- **access to professional and technical expertise from our register of quality assured consultants** who are skilled and knowledgeable in the needs of voluntary and community groups. We specialise in helping groups with feasibility studies (eg for buildings and land use), architectural studies, business planning, funding strategies and organisational reviews. This service is called **PTAS (Professional and Technical Aid Service)**;
- **Signposting** to other sources of funds and support.

B. Access to funding from grant programmes that we administer for a range of public and charitable funders. We currently administer:

- 2 health-related small grant programmes for the Heart of Birmingham Teaching Primary Care Trust;
- a consultancy programme linked to the Enterprising Communities area of East Birmingham;
- The William Dudley Trust – an independent grantmaking trust with its own Board of Trustees.

We work with groups across the West Midlands and we currently prioritise work with small, new and developing organisations that could not otherwise afford to access professional services.

We aim to deliver real outcomes for the groups and partners we work with. Our approach is to:

- tailor our support to the specific needs of individual groups;
- work with groups to transfer skills to build their capacity;
- focus on sustainable development – so that groups and projects develop realistically;
- facilitate links between groups and the wider policy and funding environment in which they are working.

The table below illustrates the range of activities we currently offer to our different constituencies:

<i>If You Are:</i>	<i>We Can:</i>
<p>A funder seeking to:</p> <ul style="list-style-type: none"> • target your resources at specific communities or areas in the West Midlands; • increase the quality of the bids that you receive; • link your funding to community development support; • reduce transaction costs by linking your funds with other grant schemes; • access quality assured consultants for specific pieces of work. 	<ul style="list-style-type: none"> • manage your grant programmes cost efficiently and effectively; • (re)design your programme to ensure it complies with best practice in community development and funding; • link your programme with our development work and the other grant schemes we manage; • distribute your tender documents to our database of quality assured consultants; • provide you with an analysis of demand and unmet needs in your area.
<p>A voluntary or community group:</p> <ul style="list-style-type: none"> • seeking help to develop your organisation; • needing specialist support to develop your ideas for a specific project; • needing funding to put your ideas into action. 	<ul style="list-style-type: none"> • provide an initial assessment of your needs; • put you in touch with the most appropriate source of local support; • help you develop consultancy specifications to meet particular needs; • help you find a quality assured consultant; • help you draft bids to the grants schemes we manage.
<p>An infrastructure support or capacity building organisation:</p> <ul style="list-style-type: none"> • looking to develop partnerships with others; • interested in pooling information about community needs. 	<ul style="list-style-type: none"> ▪ work with you to develop and implement new ideas; ▪ offer time and expertise for strategic development and policy work which is focussed on delivering tangible benefits for the West Midlands voluntary and community sector.

6. The Difference We Make:

The Trust is committed to critical review of our activities and operations. We regularly commission independent evaluations of our activities. The last global review of our work

was published in 2004¹ (with earlier reviews conducted in 1992, 1996 and 1999). The next global review will take place in 2007 covering the period 2004-2006.

We also regularly commission independent evaluations of our main programmes. For example our Grants for Regeneration and Health Programme was independently reviewed in late 2006.

Extracts from a range of these evaluations are shown in Appendix 1 of the full plan. They show that the Trust is:

- effective at reaching marginalised communities and groups;
- an effective administrator of grant funds – delivering positive outcomes for VCOs, individuals, communities and funders;
- an important source of data on capacity building needs of VCOs – particularly new, small and BMER-led groups;
- effective at helping groups to build their own capacity – thereby having a lasting impact on the efficiency, effectiveness and sustainability of the groups we work with;
- effective at highlighting policy and development issues for other organisations – particularly public bodies;
- effective at helping to lever-in additional financial and non-financial resources to the sector;
- self-critical and effective at learning from our own experiences.

7. Assessing Future Needs:

In order to ensure that we remain focused on meeting the current and future needs of VCOs, and do not duplicate existing capacity building provision, we:

- reviewed key data on the size and profile of the voluntary and community sector across the West Midlands;
- reviewed the analysis of sector support needs contained in the local ChangeUp Investment Plans from across the Region and other key documents;
- undertook an analysis of the social, technological, economic, environmental, political and legal issues affecting us and the sector;
- analysed our own strengths and weaknesses;
- analysed the data we hold on the needs of the sector – gained through our work with more than 300 organisations in the past 12 months.

The result of this analysis (shown in detail in section 3 of the full plan) has informed the development of our strategic objectives for the next 3 years and our priorities for 2007/08.

¹ A Review of the Digbeth Trust's Activities 2001-04: Final Report, Third Sector Services, November 2004

8. Our Strategic Aims and Objectives for 2007-2010:

These aims and objectives build on and enhance the Trust's existing services, infrastructure, skills and experience and demonstrate our commitment to becoming a learning organisation.

	Aim	Objective
	External	
1	To make a positive difference to disadvantaged communities	(1a) Increase the effectiveness and sustainability of VCOs
		(1b) Strive for excellence in all that we do
2	To provide access to independent high quality expertise and to small grant funds	(2a) Provide a high quality Professional and Technical Aid Service
		(2b) Provide needs-led development support
		(2c) Provide access to a wider range of small grants funding
3	To increase the reach of our services by achieving sustainable organic growth	(3a) Broaden our range of services building on current services and strengths
		(3b) Build networks to create and learn of opportunities across the Region
4	To maximise the potential of all in our community	(4a) Engage fully with our members
		(4b) Work in partnership with the VCOs we support
		(4c) Maintain a mutually productive relationship with the consultants on our register
		(4d) Create links between stakeholder groups and share expertise
5	To capture skills, experience and knowledge of our environment and use it to influence others.	(5a) Increase the range and quality of our partnership working
		(5b) Represent the membership at regional forums
		(5c) Focus resources to gather intelligence
		(5d) Disseminate sector intelligence to funders and other bodies of influence
	Internal	
6	To be the best in our field and strive for quality and excellence in all that we do	(6a) Invest in our own infrastructure
		(6b) Adopt a recognised QA system that includes a social audit component
		(6c) Invest in our staff and volunteers
		(6d) Sustain a high performing Board by adopting the Code of Governance
7	To build our own sustainability	(7a) Develop a funding strategy to build financial stability
		(7b) Develop the range of grants we administer and roll-out PTAS across the Region
		(7c) Review and evaluate our relationships with current and potential partners

	Aim	Objective
		(7d) Improve how we cost and plan projects
		(7e) Improve our sector intelligence and information gathering
8	To raise our profile across the West Midlands and maintain our reputation	(8a) Develop a more proactive communications and marketing strategy
		(8b) Seek objective assessment from our stakeholders
		(8c) Make best possible use of our IT and our web-site
		(8d) Recruit at least 1 new trustee from a part of the Region not currently represented.

9. Our Priorities for 2007/08:

Drawing on the strategic aims and objectives outlined above, we have set ourselves the following priorities for 2007/08:

- a) to increase the range and level of development support we provide to VCOs directly (eg through our in-house staff) and through our PTAS service;
- b) to increase the range of grants programmes that we administer for other funders;
- c) to develop new projects to ensure the voluntary and community sector is able to engage with emerging opportunities in relation to:
 - Social enterprise
 - Third sector involvement in public services
 - Asset transfer
- d) to play a greater role in the policy debates that are shaping the voluntary and community sector – using the information we gather from our work with 300 groups a year to help ensure that the sector’s needs and interests are heard;
- e) to invest in our own infrastructure to improve the quality of what we do and enhance our own sustainability.

We have developed a detailed implementation plan to deliver these priorities (see Section 4.2 of the full plan). This will be monitored by the Board of Trustees on a regular basis.

10. Quality, Equality and Review:

This Plan aims to ensure that the Trust’s performance is measured using the most effective indicators. To this end, we will continue to develop measures for the outcomes of our work rather than just the outputs.

The Trust currently uses the PQASSO quality assurance model – where we hold at least Level 1 in all areas. Our action plan for 2007/08 includes a review of the most appropriate quality assurance model for our future needs.

Our plan also includes incorporating a social audit component into the evaluation of our work for the first time during 2007.

We are committed to tackling inequality and promoting diversity. We already monitor our services and our internal processes to assess our accessibility and we take steps to target our activities to tackle inequities.

During 2007 we will evaluate the Diversity Excellence model with a view to adopting it or a similar standard.

We plan to commission another independent evaluation of our work during 2007, covering the period 2004-2006. This evaluation will be a public document.

11. Resourcing the Plan:

We have developed an income generation strategy which sets out how we will secure the resources to deliver this plan.

The overall funding aims for the Trust for 2007/08 are:

- To generate free reserves to fulfil our reserves policy;
- For departments and projects to be fully cost-covering wherever this is achievable, allowing unrestricted income to be utilised for development, for meeting unavoidable project deficits and for managing risks, as agreed by the Board;
- To improve cash-flow wherever this is possible;
- To develop a fees and charging policy for all our services;
- To be enterprising in seeking opportunities for income generation.

Some areas of uncertainty remain for 2007/08, particularly:

- any continuation of direct funding from Capacitybuilders;
- cost pressures within PCTs across the region;
- the outcome of the 2007 Comprehensive Spending Review.

We have made progress in adopting the Full-Cost Recovery practices as laid out in the recent Government-backed ACEVO report and it is our aim to continue moving towards implementing this in co-operation with our funders.

**The Digbeth Trust
February 2007**