

# TESTING DIFFERENT MODELS OF SUPPORT: CASE STUDY

## Professional and Technical Advice Service (PTAS)

<b>Provider</b>	Digbeth Trust
<b>Purpose</b>	To provide professional and technical aid, guidance and support to voluntary and community organisations who would otherwise not be able to access them
<b>Length of support</b>	2-15 days (depending on extent of grant funding or size of contract). The days can be spread over several months
<b>How long it's been run</b>	5 years
<b>How many TSOs can be supported?</b>	Dependent on funding – they are able to provide access to consultants when they have secured grant funding or have secured a contract to deliver capacity building support
<b>Resource implications</b>	It is only one element of Trust's work. The resource input is less than 2 FTE staff.
<b>Beneficiaries</b>	Grass roots third sector organisations (TSOs) in Birmingham and the West Midlands seeking to develop community facilities and services
<b>Main reasons for accessing support</b>	Need to develop: funding sources; business plan; human resource systems; specialist skills on legal and financial matters; training; and project management skills.
<b>Needs assessment / health check</b>	A Trust Development Worker/Officer conducts an in-depth 'health check' interview and site visit with the beneficiary, and uses this to write a brief that is then put out to tender with the register of consultants
<b>Development tools</b>	No common development tools are used, though some individual consultants do use development tools where considered appropriate and individual projects have produced reusable tools, for example work on asset transfer and work on social franchising.

### Summary & background

The Digbeth Trust, a third sector infrastructure organisation, has been providing its Professional and Technical Aid Service for over 5 years. The aim of the service is to provide professional and technical advice, guidance and support to TSOs which would otherwise not be able to access it.

The service grew from the Trust's extensive experience of similar services delivered for the Inner City Partnership programme between 1984 and 2000. The Trust managed the delivery of feasibility studies for major projects and buildings by architects and specialist third sector consultants to local TSOs. As a result, by 2000, the Trust had a strong reputation with the local city council and local grassroots TSOs which has placed it particularly well to link the public sector and grassroots TSOs. Both beneficiaries we spoke to said they turned to the Digbeth Trust because they had an ongoing informal but professional relationship with staff from the Trust, gained through events or third sector forums. Over this 16 year period, the Trust has also built up an extensive list of contacts of local consultants experienced in providing advice to local grassroots TSOs.

Over the past 5 years this list has been extended to include consultants with a wider range of skills, and formalised into a register that the Trust manages. Many consultants have been on the register since it was established, and some give individual professional support to Trust staff. In this way they behave very much like an extended part of the Trust team, for example

giving advice about IT support issues, assisting with presentations to clients, and acting as a sounding board for senior staff.

### Beneficiaries

The service targets primarily grass roots TSOs in Birmingham and the West Midlands seeking to develop community facilities and services. We interviewed beneficiary organisations and consultants who delivered service, to get a picture of the types of TSOs receiving support. Those interviewed – or mentioned by consultants - were largely 'community-based' and played a significant role in providing various services and resources to the local community. However, there was huge variation amongst the groups, both in terms of their purpose – from a Sikh temple to an amateur football team – and their stage of development – from an established charity with a large budget and around 30 full time equivalent staff to an organisation run entirely by volunteers.

### Reasons for accessing support

According to the Digbeth Trust, most of these groups access support from PTAS for consultancy support relating to: funding; business planning; human resources systems and processes; specialist skills on legal and financial matters; and project management skills. We interviewed two beneficiaries - both went to the Trust for support to develop a business plan, and one of the two also wanted support to develop a fundraising strategy and a marketing plan.

## What does the service involve?

Essentially, the Digbeth Trust manages and brokers relationships between beneficiary TSOs and consultants from their register. The Trust is able to provide free access to these consultants for TSOs either through securing grants or contracts to deliver capacity building on behalf of a public sector agency. The Trust works to ensure that their applications for funding reflect their organisational mission - to enable the development of an influential, effective, independent and sustainable voluntary and community sector across the West Midlands through the influencing of policy and the provision of expertise – and meet the needs of groups. For instance, in two recent applications to Capacitybuilders 'Improving Reach' and the Big Lottery BASIS 2 fund, the Trust applied for funding for longer, smaller-scale support packages as well as the more intensive ones specified by the funders. This reflects their experience that many groups require only small inputs irregularly and over a long period to achieve their capacity building objectives.

The PTAS process begins with the Trust publicising the opportunity for TSOs to access support. In many instances, this is followed by a competitive process where organisations are selected according to whether they are likely to benefit significantly from the support. Where the funder has a specific target group, this group is prioritised; this means that some groups that don't fit the funders' criteria can lose out. Nevertheless, the Trust is also careful not to 'shoehorn' groups into inappropriate support. As a result, groups are often asked to wait to receive support until appropriate funding is secured by the Trust. However, the Trust is able to mitigate these effects on groups, firstly by selecting funding that fit with their vision and mission and secondly by trying to ensure it is delivering a mixture of programmes with different target groups at any one time.

Once a group is selected to receive support the first step is to link the group with a Digbeth Trust Development Worker who helps them to write a brief. The brief is then put out to the Trust's register of consultants, who submit a tender for the work. Once these have been received, the beneficiary organisation decides – using guidance provided by the Trust - which consultant best matches their requirement. Over the following weeks or months the consultant then delivers against the brief provided, and this includes a range of activities but primarily feasibility studies, business plans, organisational reviews

and funding strategies (The Digbeth Trust Review 2004 – 2008, October 2008, MEL Research).

The whole process relies heavily on the Digbeth Trust's **register of consultants**, which is a **closed list**. To be on the register, consultants have to apply to the Trust's Board of Trustees and provide two referees. All consultants must also pay an annual subscription (to cover administrative costs) and, on annual re-application, must re-submit at least one reference from a local TSO they have worked for in the past year. All of this helps ensure that consultants are of a certain standard and that their experience is constantly being updated.

## Outcomes

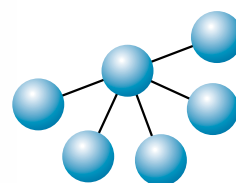
We interviewed two beneficiary organizations, both of whom had benefited from the service in organisational and financial terms. The first was 'better able to describe ourselves and our mission' as a result of the support, while the second said 'it's given us a sense of clarity'. One had won a small contract to deliver a worklessness project for Birmingham City Council and the other had established a website for its conference venue that had already brought in revenue. The latter had also secured £500 from a charitable trust following advice from their consultant. The consultant had advised that the beneficiary begin systematically sending out generic letters to funding bodies asking for grants and had helped them to develop the generic letter.

The Digbeth Trust has also produced three case studies that provide examples of the impact it has had on specific beneficiaries.

- **Case Study 1: Cycle Chain.** The Trust financed a feasibility study, delivered by their consultants, for this social enterprise that demonstrated a city centre demand for cycle sales and a parking facility. This was crucial to building the evidence base for the need for the social enterprise.
- **Case Study 2: Bangladeshi Youth Forum.** The Trust financed consultancy support to develop and submit an application for funding for the 'Uniting Communities Badminton Championship', which was successful.
- **Case Study 3: Ryders Green.** A church day centre was able to raise over £54,000 with the help of a consultant from charitable trusts for revenue and capital costs including a minibus.

### Critical success factors

- The service is able to provide beneficiaries with **specific expertise whilst also helping to assure quality**. It is able to provide this primarily because of a combination of the trust's local reputation and the way they manage the register of consultants.
- The **Trust's reputation for delivering a similar service locally** has been crucial for several reasons. Their good reputation with the local public sector has helped them win public sector grants and contracts. It has also gained them the trust and respect of local grassroots TSOs, ensuring strong take-up of PTAS amongst local TSOs. In addition, over the past 20 years, they have developed an extensive register of consultants with a range of expertise but all with experience of working with local grassroots TSOs.
- The way in which the Trust **manages and constantly updates the consultancy register** ensures the right mixture of expertise and sufficient experience of working with local TSOs.
- Finally, the Trust **oversees the delivery of the whole service** from guiding them in selecting a consultant through to collecting satisfaction feedback at the end. During the delivery of the consultancy support they maintain regular contact with recipients to ensure they receive a quality service. All of this helps provide consistency of quality and ensure tensions are resolved if they arise.



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