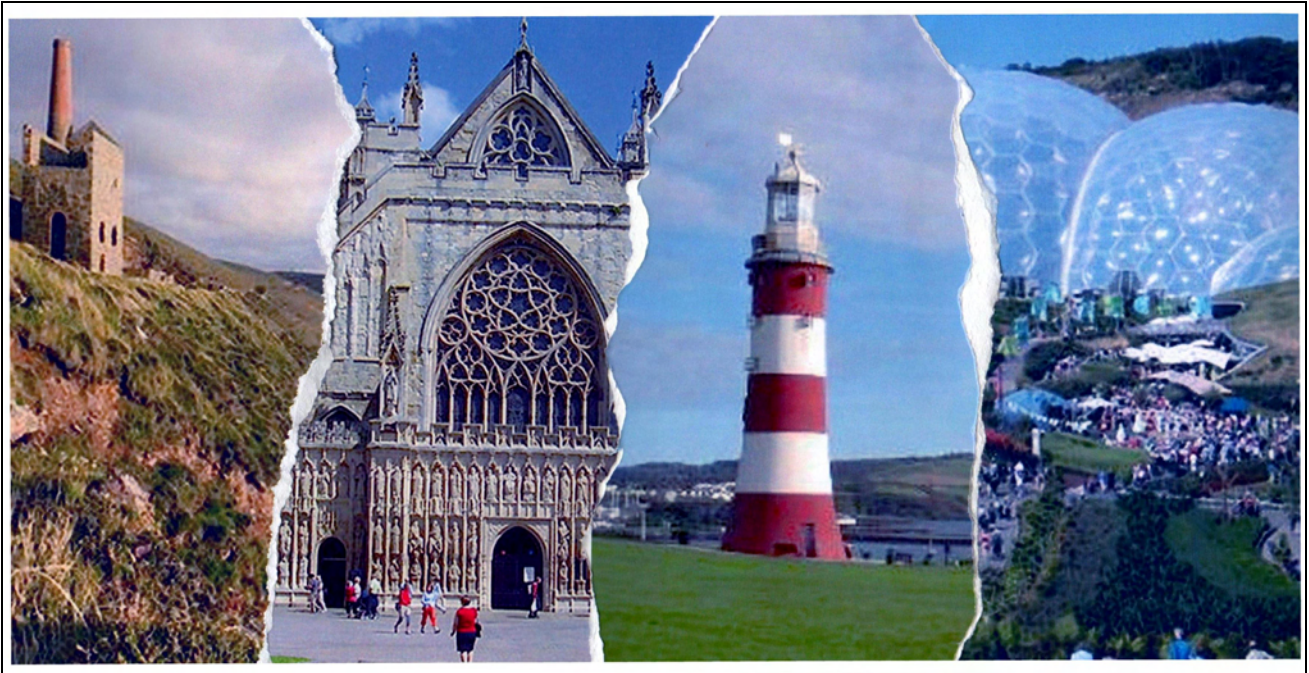


# DEVON AND CORNWALL TRAINING NETWORK



# REVIEW

## JULY 2010



FilbyMoore Associates



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## **EXECUTIVE SUMMARY**

In July 2010 FilbyMoore Associates were commissioned by the Devon and Cornwall Training Network to undertake a swift and far-reaching review of its structure, membership and functions, and make recommendations for its future role and development. This review took the form of a series of meetings, interviews, telephone and email questionnaires and desk top research into the training and development sector both locally and nationally.

### **Review**

#### **History and Structure**

Devon and Cornwall Training Network (DCTN) has operated across Devon and Cornwall for approximately 15 years. It was initially set up by Local Authority Housing Officers to bring training to the area. It has evolved into a Membership organisation with 35 members. It charges fees of £395, £135 or £50 and this entitle Members to send up to 2 delegates to each of 10 training events annually which is the equivalent of £20 per head per event. Members can purchase places, at cost price, on bought in courses. An annual newsletter, a website and frequent emails keep Members informed of Network activities and events.

DCTN is a membership organisation but the current constitution and structure lack clarity. A Service Level Agreement with South Hams covers employment and day-to-day financial activities but is due to end in December 2010. A review of the structure to consider registering as a Charity, or other changes, could provide access to sources of funding.

#### **Membership**

Registered Social Landlord	16
Local Authority	11#
Not-For-Profit Agency	5
Legal Practice - Solicitor	2
Other	1

# Cornwall Council is a single member but is equivalent to six separate local authorities.

The Membership was surveyed and it was clear that most felt that training was of great value. The membership was fairly “passive” and didn’t expect to become involved further with the Network. There was no sense of “ownership” of the Network amongst the members that were interviewed. Members were not currently looking to save money by cancelling their membership, but most felt that any increase in fees could raise the Network “Above the radar” and could result in scrutiny and potential cuts. Any attempt to increase the fees should be accompanied by clear additional value to the membership, eg courses of specific interest, access to more bought-in-training.

#### **Steering Group**

The Steering Group is clearly the engine that drives the Network. Attendance at meetings is open to a representative of all 35 Members, but in reality a core of 9 people, not all representing a single Member, form the Group.

Many long-standing members appreciate the comfortable and informal culture that has been

created. Newer Steering Group members find it more difficult to justify the calls on their time that organising training events require and often leave the Group fairly quickly. Recent cancellations of events have caused some members to question the continuing viability of current mechanisms and structures. There were frequent calls to professionalise the service further, set clear objectives and pass more tasks to the paid member of staff, the part-time Training Administrator.

## **Training and Events**

The annual programme, although very well received by delegates in the main, is developed in a fairly ad-hoc manner. There is currently no linkage between the formal training needs/plans of members and the development of the programme. Some Members felt it was difficult to influence the development of the programme. Other Members feel that the training is too focussed on the needs of Local Authorities, who are no longer the largest group of Members.

Feedback from events is mostly extremely good. The two bought-in-courses, Shelter Housing Aid A and B, and the NLP Introduction, are extremely popular and well received. Steering Group members take the lead for at least one event but this can involve a lot of work and some members cannot commit the required time. Occasionally a speaker does not pitch their contribution at the right level, (too simple or too complex) and the odd one is not very skilled at imparting information. Speakers cancelling at the last minute is a perennially organisational problem.

The training is spread across the two counties, although there are fewer events in Cornwall. This causes comment and concern from organisations based in Cornwall.

There is scope for the Network to buy-in and resell more training locally. The saving in staff time, travel costs and the benefits for an individual's family life were articulated very clearly by some Members.

## **Administration**

The network employs a Training Administrator for 3 days per week. The Training Administrator struggles to accomplish all the tasks detailed in the JD in the available time, and marketing and promotion tends not to be done. The current system of Steering Group members leading the organisation of the training events causes major problems for the Training Administrator and often results in delays and the duplication of work and tasks. All involved agree that this situation is ripe for a review.

## **Finance**

The Network has a reasonable amount of reserves and recognises that there is an opportunity to utilise these in achieving growth or change. There is not an urgent need to review or increase the membership fee, but a formalised annual review of the service should encompass finance.

## **Recommendations**

Our research highlights that DCTN is at an important stage in its development and that some key decisions regarding its future size, function and structure need to be made.

We recommend a series of actions for the Steering Group to consider.

## **MAINTENANCE-V-GROWTH**

The Network/Steering Group consider:

- Growing the organisation as it has potential to enter a period of rapid growth.
- Change to its legal structure – eg apply for charitable status etc
- Making stronger links with strategic players in the two counties, organise events and buy in training for members and partners
- Developing stronger support, managerial and developmental structures to underpin its continued existence
- A root-and-branch review of its constitution and organisation with professional assistance
- Developing a real feeling of “ownership” amongst its membership
- Undertaking a comprehensive risk assessment before making decisions about its future development
- Utilising its excellent contacts across the two counties to consult its membership and plan for the future
- Further professionalising the organisation.
- The primary drivers and functions and consider whether it should be primarily a “housing agency” or whether it can become a more board organisation – learning or housing led?
- Geographical boundaries and consider whether there is any benefit in including part or all of Somerset within its umbrella
- Potential liabilities or problem areas for Members, Steering Group etc, and reformulate to minimise these

## **MEMBERSHIP**

The Network/Steering Group consider:

- Enabling the Training Administrator to spend more time servicing
- Enabling the Training Administrator to develop marketing strategies for the service

The Network/Steering Group/Training Administrator consider:

- Prioritise improving knowledge and awareness of the Network amongst Members
- Develop membership and services for those organisations that hold Supporting People contracts.
- Mechanisms to position itself with Members to ensure that the service is high profile and valued so that terminating membership to save money is inconceivable.
- Pro-actively seek Members from RSL, N-F-P and cater for their training needs.

## **TRAINING and EVENTS**

The Network/Steering Group consider:

- Utilising Members’ data to set training needs and priorities.
- A more systematic approach to planning training programmes.
- Remitting most aspects of course organisation to the Training Administrator or other paid staff.

- Potential partnerships with major training providers in order to facilitate the development of “purchased” training/develop training broker function

The Network/Steering Group/Training Administrator consider:

- Creating a template for the organisation of training events.
- Devising a system of rating the level of courses to assist bookings.
- Linking with strategic partnerships and agencies in the region to identify gaps in training provision and to develop mechanisms to fill these gaps.
- Accreditation and/or CPD points/hours.
- Developing close working links with the Learning and Skills council/UWE/CHI etc
- Development of a programme of more bought-in “re-sellable” training
- Reviewing the training delivered in Cornwall and proactively endeavour to get more take-up from the area to demonstrate that these Members get value for money

## **STAFFING**

The Network/Steering Group consider:

- A review of the role of the Training Administrator and the staffing requirements of the Network should be undertaken.
- Alternative methods of performing the more basic clerical functions.
- Developing a mechanism to enable the Training Administrator to undertake the marketing, promotional, developmental and liaison functions of the network.
- Paid management (part-time) of the Network.
- Plans for the future of employment of staff after the end of the current SLA.

## **STEERING GROUP**

The Network/Steering Group consider:

- The Constitution/make up of Steering Group.
- The Steering Group – role, membership, objectives etc.
- Amending the Steering Group’s function to strategic direction, project management, review and development
- Skills, sectors, knowledge, and locations that should be represented on the Group.
- Looking outside membership organisations for key skills and knowledge.
- Creating “Job-Description” and task list for potential Steering Group Members.
- How to retain the “cosy and informal” feeling of the Steering Group whilst refocusing and professionalising.
- The format and content of Minutes to maximise their usefulness beyond the Group.

## **FINANCE**

The Network/Steering Group consider:

- Utilising reserves to develop/refocus the service
- The financial position once key decisions concerning the future structure, role and constitution of the organisation has been agreed
- The future structure, function and development when setting the level of future membership fees

## **1.0 INTRODUCTION**

### **1.1 Background to Review**

Devon and Cornwall Training Network (DCTN) has evolved over time and has reached the point where a strategic review of the service and the sector is desirable. The current economic situation has potential to impact negatively on the Network and the Steering Group wishes to position DCTN to minimize serious damage to its function and future. This review comes at the end of a period of change which saw the employment of a part-time worker hosted by South Hams District Council, the redesign of the web site and rebranding of the Network.

The timescale for this review was, by virtue of circumstances, very tight. The meeting to agree the work took place on Monday 7 July and the presentation of the report and findings to the Steering Group took place on Tuesday 20 July.

### **1.2 Devon and Cornwall Training Network**

Devon and Cornwall Training Network is an umbrella organisation that has 35 members. It is managed and directed by a Steering Group and has one part-time employee who is employed by South Hams District Council under a Service Level Agreement.

It charges an annual membership fee and organizes a programme of training events that are free at the point of delivery for member organizations, and buys in training events which it sells on at cost price. It has a web site and produces an annual newsletter. In the past it has organised and run an annual conference.

### **1.3 Aim**

The aim of the exercise was to independently review the following elements of the DCTN:

- Training activities
- Current and future membership of the Network
- Fee structure
- To gain a better understanding of the training needs of the sector.

A series of recommendations were to be made in the following areas:

- Maintenance versus growth
- Future training
- Future Membership
- Staffing
- Fee Levels and budgets
- The future role of the Steering Group.

### **1.4 Methodology**

Due to the tight time-frame for completion, this review was designed to minimise travelling time and maximise the collection of data from a wide range of sources. The review aimed to obtain information, feedback and suggestions from the following sources across the two counties:

- DCTN Membership
- Steering Group Members
- Paid Staff
- Delegates from past training events
- Trainers/Speakers

A major desktop and document review took place during the length of the review. The DCTN website was reviewed and an overview of the sector and training available in the area was undertaken.

A range of key documents were obtained and utilised, including:

- Devon and Cornwall Training Network Constitution
- Network Facilitation for Devon and Cornwall Training Network – Service Level Agreement (between South Hams DC and DCTN)
- Job Description for Admin (put in full)
- Consultants' Brief
- Minutes of Steering Group Meetings
- Newsletters 1-6 (2004-2009)
- Annual Training programmes
- Training feedback - various evaluation formats

A formal meeting with the Training Administrator and the member of the Steering Group who acts as direct line manager for this post took place, and this was followed by individual interviews with both these parties. All active members of the Steering Group were interviewed either on the telephone or face-to-face, 9 in total. All Members of the Network, 35, were contacted and a telephone interview was requested and, where this was not possible or no response was forthcoming, an email questionnaire was sent with a request for its completion. A cross section of delegates from training events over the past eighteen months (64) were contacted by email and a telephone interview was requested, with an opportunity to complete an email questionnaire if this was preferred. A small number (4) of trainers or speakers were spoken to directly on the telephone.

## **1.5 FilbyMoore Associates**

Jane Filby and Brian Moore have extensive experience in the world of training. Both have devised and delivered both information and skills based training sessions for a range of skill levels from Citizens Advice Bureau recent intakes, to highly experienced local authority officers. They have undertaken detailed training needs analyses exercises and formulated training plans for organisations. FilbyMoore Associates have undertaken reviews of projects and organisations in the field of housing and homelessness. Together with a local MP and the Chief Executive of an RSL they undertook and published a detailed review of future housing for a major city in Devon. Alongside research they provide crisis management services for agencies experiencing difficulties, and are currently providing interim management for a large not-for-profit advice service in Dorset.

# **REVIEW**

## **2.0 BACKGROUND**

DCTN is described on its website as having been “Formed many years ago as a self-help group of Housing Officers, in recent years we have become more focused in our approach to training and to learning in a much broader sense”. It describes itself as non-competitive, but “listens and delivers”. It endeavours to offer a training and event programme that is varied, targeted, professional and fun, and which is tailored to meet Members’ needs and aspirations.

### **2.1 History and Development**

The exact age of the Network appears to be uncertain (between 10 and 15 years were suggested), but it is certainly considerably over a decade old. The Network was set up by Ron Mayers and Stuart May, both working for Local Housing Authorities at the time, and was a response to the high cost, in money and time, of sending staff to be trained in London or other metropolitan centres. Originally it was hoped that by working together, authorities could put on training courses locally by pooling resources and paying trainers to come down to the area.

The Network took some time to become established but after two years it started to grow and attract members. Initially the membership fee was about £200 per year. Stuart and Ron remain key members of the steering group with Stuart currently filling the role of Chair. The Network was administrated by Mary Mayers for many years. She stepped down approximately 2.5 years ago and the Network appointed a paid training administrator who is based in the South Hams Council and who also works mostly from home. More recently the Steering Group has overseen a series of charges to rebrand the Network and make some operational changes.

### **2.2 Constitution and Structure**

DCTN has a written constitution that was revised in March 2010. DCTN describes itself as a partnership. We understand that there is no formal membership agreement that is signed when an organisation first joins the network or renews its membership. It is not clear which, if any, of the terms of the constitution could be held to be binding on the membership and what aspects of the constitution could be enforced. An AGM takes place annually.

The Network is not a registered charity and therefore does not benefit from the access this would give to sources of funding. The Network has potential liabilities through claims that could be brought as a result of one of its events and it is not clear if it holds Public Liability Insurance or possibly piggy-backs onto other peoples’ insurance.

A Service Level Agreement exists between the Network and South Hams District Council. We were given a copy of Draft 2 of this document which we understand was the version that was signed by both parties. This document sets out the roles and responsibilities of both parties but there seem to be gaps which cover any potentially contentious aspects of the employment of the Training Administrator. There is a lack of clarity of where ultimate liability would lie in the case of serious problems with the employment of the Administrator, eg disciplinary action, Employment Tribunal etc. There is an “arbitration of disputes” section which states that an agreed third party would arbitrate and affect a mutually satisfactory outcome. Minutes seem to indicate that South Hams will not continue to employ the

Training Administrator beyond the life of the SLA. There are a number of clear issues that are raised by this situation and the Network's Steering Group needs to start making plans to deal with them.

## **2.3 Current Structure and Funding**

The Network is a membership organisation that currently has 35 Member agencies.

The Network charges an annual fee, which currently stands at £395, £130 or £50 (dependent on status of organisation or individual – with a specially negotiated fee for Cornwall Council). For this fee the Members have access to ten training events each year to which they can send up to two delegates. They also have access to training that is “bought in”, sold on a not-for-profit basis, and members purchase places.

The Network is directed and run by a steering group and employs a Training Administrator for three days per week.

The Network has a website which provides information on the Network, Training Programme, Steering Group, Members and Useful Links. A recent upgrade has enabled the workshop presentations and minutes to be downloaded and a booking form for events to be downloaded, completed and emailed back to the Training Administrator.

## **2.4 MEMBERSHIP**

The current membership of 35\* organisations can be divided up as follows:

Registered Social Landlord	16
Local Authority	11#
Not-For-Profit Agency	5
Legal Practice - Solicitor	2
Other	1

\* Figure includes agencies who were members during 2009/10 but who have not yet paid 2010/11 membership fee (which is now due).

# on the formation of the Cornwall Council a special membership rate was created for this single authority to replicate the access to courses that existed when there were six separate local authorities.

We understand that Membership has been stable for a number of years and that only one organisation has ceased to be a Member in the past 2.5 years. The Membership provides access to 2 places on each of the training programme events (20 places in total). The membership fee translates to 20 training places (2 x 10 events) @ £20 per delegate, access to bought-in courses at cost price, and an annual newsletter.

There is an expectation that member organisations will support the network in other ways, eg providing venues and/or refreshments for events

### **2.4.1. Feedback from Member Organisations**

We contacted all 35 member organisations and received responses from representatives of 16 member organisations. Their feedback is detailed below.

The organisations surveyed had been members of the network for periods ranging from originating members who helped set it up, to those who joined less than four years ago. The not-for-profit agencies that we spoke to were amongst the more recent members. We asked them a range of questions covering areas from the training programme to the future of the network. We have included this feedback in the relevant sections of the report.

Members were, in the main, fairly content with the Network and its activities, and were fairly “passive” in that they didn’t expect to be very involved but were happy to send staff to training events. Two Members commented that it was difficult to influence the training programme which was set far in advance. There was a refrain from those in Cornwall who felt that training events were too often located in Devon. The figures show that this perception is justified to some extent, particularly if those organisations that cover both counties are identified separately. Many agencies that cover both counties have addresses in Exeter, and therefore on paper the training locations might seem divided proportionally, but the reality of the situation needs to be reviewed in a more sophisticated way.

The Membership comprises 9 Members who operate only in Cornwall and an additional 6 agencies who work across both Devon and Cornwall. We have counted Cornwall Council as 6 members based on the larger fee they pay and fact that they were previously 6 separate local authorities. The spread of courses and Members is:

	Members	% of total Membership	Courses	% of total Courses run
<b>Cornwall</b>	9	22%	7	20%
<b>Devon</b>	25	63%	28	80%
<b>Devon and Cornwall</b>	6	15%	--	--

There was no sense of “ownership” of DCTN when talking to Member organisations. The overwhelming impression we got from our contact with Members was that the training was very useful but there was no real interest or time available to invest in the future development of the Network. None of those we spoke to refer directly to the membership agreement they had committed themselves to when they paid their fees. There may be scope for the Training Administrator to create stronger links with each Member and encourage more involvement for each. This is currently not possible due to the work load of the role. This could be a very useful exercise as it could result in better access to venues, funding of refreshments and lunches, more input into the training programme etc.

#### **2.4.2. Membership Fees - Feedback from Member Organisations**

Member organisations were asked if the current fee structure represented good value for money. All bar one organisation felt that the charge represented excellent value for money. A single agency located in Cornwall felt that at present the fee did not represent good value, but indicated that in the past they felt it had. This agency had sent large numbers on training courses three years ago, but had not sent any delegates for the last two years. The issue of location of courses and the relevance of subject matters were the cause of this change in practice and concern over the relevance to the organisation of the training programme.

Members were asked if an increase in fees would cause them to reconsider their membership. Responses to this were very mixed. A small increase, eg £50 to £450 might not cause problems for some, but there was a more general feeling that larger increases

would focus attention on the range of the training, access to courses etc. One Member felt that any increase would raise the service “Above the radar” and might attract unwanted attention, but within the same agency the advice service manager felt that the training represented such good value that they could easily justify considerably higher costs. Some members very candidly stated that if the training programme changed and became more relevant to their agency they could justify the prioritisation of funds to pay the increase in fees. Amongst the changes that Members felt they could use to make a case for increased payments were the provision of core legal training, safety, risk management and other subjects relevant to those with Supporting People contracts.

### **2.4.3 Future Membership**

Many steering group members identified potential to develop into the N-F-P sector. Other potential areas for growth include social enterprise organisations and Supporting People Contract holders. RSL membership could be cultivated as, during interview, one Member candidly reported that when dealing with RSL staff they noted a distinct lack of knowledge in fairly basic areas of housing law and management practices.

If the Network develops broader courses on areas such as Benefits, risk assessment, health and safety which are of interest to a broad range of staff they may be able to charge existing members for places in excess of the core programme – double the number of useful courses and double the membership fee?

## **3.0 STEERING GROUP**

### **3.1 Role and Function**

Every member organisation can send a representative to the Steering Group meetings, but in reality there is a core group of attendees, a number of whom were responsible for setting up the network. The Steering Group is currently comprised of 9 active members. Attendance at meetings and involvement in activities depends on the work and personal situation of each member. The formal roles of the Chair and Treasurer have been supported by a Vice Chair more recently to take some of the pressure off the Chair. A member of the Steering Group undertakes the direct line-management of the Training Administrator. At least one member of the Steering Group is not a direct representative of a single member organisation, but is employed jointly by several member agencies.

The Steering Group meets bi-monthly and oversees the delivery of the programme, the planning of events, the finances and development of the service. The Group take joint responsibility for governance of the Network. In addition each Steering Group member is required to oversee at least one of the programmed events each year.

Whilst each member agency can send a representative to Steering Group meetings, resulting in 35 possible attendees (or 40 if Cornwall sent 6 people), in reality the group is formed of designated representatives. There is a contradiction between the constitution and evolved practice. This review presents an opportunity to clarify the make-up, powers, tasks and responsibilities of the Steering Group and to formalise the procedures and roles of the Group.

One fairly long-standing member of the Steering Group described its members as “Passionate” and “Committed”. A number of members felt that the group was sharply divided into the longer standing members who were committed, organised and events, and

newer representatives who very quickly found the set up to be out of step with their working practices and the task of organising events too time consuming. A phrase that was frequently used by members was the need to “professionalise” the organisation. There was a feeling that this had started to happen and that the website and other changes introduced more recently were evidence of this. However, there was still a lack of strategic direction and membership of the Steering Group was not attractive to newcomers. We spoke to a new member who had attended one meeting of the group and was left confused by the role and doubtful that they were the right person to attend meetings. They had a background in “learning” and felt that the Steering Group meeting and the Network were very clearly “housing”, not “learning” focussed.

### **3.2 Planning and Organising Training Events**

The Steering Group plans the annual training programme with the support and input of Training Administrator. When asked how they undertake reviews and analyses of training needs and identify the needs and requirements of members, we received a variety of answers, but “finger in the air” was a commonly used phrase. The majority of members felt that it was an intuitive process rather than informed by feedback or analysis

The feedback surveys from training events ask for suggestions for future topics for events, and the annual newsletter has been used to seek suggestions, offering a prize to encourage responses. There is no formalised link between the Group and Members that utilises organisational training plans or other similar mechanisms. We understand that the Steering Group utilises any information received, and Steering Group members’ own experience and knowledge when devising the programme. There is little time or opportunity for strategic review or planning during Steering Group meetings or within the Training Administrator’s role.

Steering Group members were divided as to whether this part of their role was sustainable. It was clear from our conversations that those who had been members of the Group for a long time accepted this call on their time and enjoyed it, whilst some of the more recent members felt that they were busy with their day jobs and that this aspect of the work was too onerous.

In the past few months, two planned events have been cancelled due to lack of time to organise them, and this was seen by some members of the group as being a sign that this current arrangement was becoming unsustainable. It was suggested that if the Training Administrator had more time, they could do much of the work to arrange these events, eg liaison with speakers, setting dates, booking venues etc. The role of Steering Group members could then be focussed on identifying potential topics and giving details of possible contacts to the Training Administrator.

A lack of clarity regarding the function of the Network was raised by a number of Steering Group members. For many it was clear that this was a housing/housing related agency with the occasional anomalous event thrown in, eg NLP, but for others it was felt that the wider field of training should be on the agenda and a broader and more “learning” approach should be taken. There are opportunities for other skills-based events that would be of use to the Members and that these could be investigated. Many people we spoke to felt that the original aim of purchasing training and reselling it should be undertaken. One Member commented that not only was this advantageous in terms of resources such as money and staff time, but it had real benefits in enhancing the individual’s family life as it minimised time spent away from home.

### **3.3 Steering Group Meetings**

The Steering Group members overwhelmingly fed back that the meetings were very relaxed, informal, comfortable and fun. There was praise for the Chair in creating and maintaining this atmosphere and culture. It was acknowledged by all that there was a fine line between comfy, informal meetings and time-consuming and unproductive meetings and it was agreed that it was vital the Chair continues to work to maintain an effective balance.

There were a number of members who felt that there was little or no opportunity for the Steering Group to take a strategic approach to the Network and that the focus on programme organisation and delivery was hindering consideration of the need to develop and evolve. Many Steering Group members felt that if the task of organising and responsibility for overseeing the training events could be taken on fully by the Training Administrator, the Group could then look at developing the Network, increasing membership and setting a clear direction of travel.

It appears that the Steering Group fulfils the role of a manager for the project, and due to the time-distance between meetings, this can make the decision-making and action slow and frustrating. There is a need to review this aspect of the Network if it is to become dynamic and responsive. This is particularly important in the current economic climate and with the threatened cuts and changes to local authority budgets.

### **3.4 Steering Group Minutes**

A link to download the minutes of the Steering Group is posted on the website and they are available to all Members and anyone else who visits the website. The downloads are very clear and easy to use. The minutes are a useful method of communicating with the wider Membership. It is important to balance effective use of the time of the minute taker and the person who types up the minutes (currently the Training Administrator) with the usefulness of the minutes to those who were not present. To a non-Steering Group member they are often rather oblique. The minutes contain copious initials and acronyms and very brief points from areas of discussion. If they are to be an effective way of keeping the membership informed, some consideration needs to be given to making them more comprehensible and informative for the non-attendee.

## **4.0 TRAINING AND EVENTS**

### **4.1 Training Programme**

DCTN endeavours to provide training across both counties. The training available breaks down into the core programme that is free to Members at the point of delivery and the purchased courses that are sold on at cost price.

<b>CORE PROGRAMME</b>	<b>08/09</b>	<b>09/10</b>
NEGOTIATING SKILLS	Totnes	
INTRODUCTION TO SOCIAL HOUSING	Plymouth	
HOUSING OPTIONS/HOMELESSNESS PREVENTION	Totnes	
IMMIGRATION/MIGRATION	Bodmin	
ESTATE MANAGEMENT	Wadebridge	
PLANNING FOR NON-PLANNERS	Exeter	
CROSS BOUNDARY WORKING: LAA	Totnes	
HOMELESSNESS DECISIONS AND REVIEWS	Newton Abbot	
DEBT MANAGEMENT, ILLEGAL EVICTION & HARASSMENT	Plymouth	
PRIVAE SECTOR HOUSING		Totnes
TACKLING MORTGAGE ARREARS		Exeter
HOUSING AND WORKLESSNESS		Plymouth
CODE FOR SUSTAINABLE HOMES		Embercombe
PARTNERSHIP WORKING/LAA		St Austell
<b>COURSES SOLD ON AT COST PRICE</b>	<b>08/09</b>	<b>09/10</b>
SHELTER - FOUNDATION - PART A	Plymouth	Totnes Totnes
SHELTER - FOUNDATION - PART B	Plymouth	Totnes Totnes
NLP CORE SKILLS		St Agnes Exeter Totnes

The data provided for the Shelter Key Housing Aid and Advice course, parts A and B indicates that these courses were run 5 times each but there was no available information on the venue contained in the In-House Evaluation Summary sheets.

Data provided for the past fourteen months indicates that the Neuro-Linguistic Programme Core Skills course was run 4 times, and at least one of these courses took place in Cornwall.

The Steering Group members felt that there were opportunities to develop the Network's

reach and offer a broader range of events for a broader range of delegates. It was frequently stated that Benefits training would be useful for large numbers of staff within Member organisations. Supporting People-funded projects were felt to be well served by SITRA, but in reality they run a handful of events in Taunton and Bristol each year and charge £195 + VAT per head.

A long-standing member commented that initially it had been envisaged the network would buy in training from elsewhere and sell it on. This does occur, but there is a feeling that this could happen much more often. The administration would be fairly straightforward and there is considerable demand for a huge range of training in Devon and Cornwall.

Potential partnerships with training providers such as the Chartered Institute of Housing Shelter and SITRA might be able to bring more training into the area and a number of Members are keen for the Network to develop in this direction.

Member organisations felt that it was difficult to influence the training programme as it was set far in advance and that their needs were constantly changing. There was also a suggestion that the Shelter training was booked in more frequently which would then enable them to book new recruits on training fairly speedily. They suggested running the course 3-4 times each year.

## **4.2 Training Feedback**

All the members of the Steering Group commented that the feedback that was reported to meetings was very positive. The areas that seemed to consistently attract negative comments were car parking and refreshments.

The Steering Group felt that with a range of speakers at many events it was possible for the occasional one to fall below the quality threshold, and that when this happened this is noted on the data base and the Group make sure they are not used again. It is very difficult to prevent this happening completely and one Group member gave an example of a recommended speaker who when contacted was very keen to participate, commenting that they loved training. On the day this speaker was dreadful, but there seems little that can be done in cases like this.

An issue that arose more often concerned the level at which the speakers were asked to pitch their contribution. On occasion it is too basic and on others it is too complex. Some Steering Group members suggested that the Network set out some clearly defined categories and whether any previous knowledge is needed and attach these standards to the booking information for all future courses. These could be fairly broad -

- Introduction: No knowledge or previous experience required
- Intermediate: Some knowledge of a particular piece of legislation or area of work
- Advanced: A full working knowledge of legislation or area of work is essential.

A more frequent problem is last-minute cancellations by speakers who have been booked well in advance, leaving the Steering Group member to rush around and parachute in a replacement. This can fundamentally alter the structure and content of the event, and can lead to disappointment and negativity for delegates. Again there is little that can be done, other than emphasise that the time for doubt or reconsideration is at the point of acceptance and not 2 days before the event, and ensure that the speakers are recommended by a reliable source and well briefed at the start.

#### **4.2.1. Training Feedback - Previous Delegates**

We contacted 64 individuals who had booked to attend a training course over the last eighteen months. We contacted 28 delegates based in Cornwall, 35 based in Devon and one delegate who was based in Somerset.

We received a total of 21 responses to our email and followed this up with either a telephone interview or an emailed questionnaire.

23% of respondents had attended the NLP training and gave extremely positive feedback. 5% attended the Shelter training and felt the event had been outstanding across the board. The remaining interviewees had attended a range of events including Mortgage Rescue, Partnership Working, Introduction to Social Housing, CODE, Planning for Non-Planners and one recalled an annual conference in July 2008. The feedback was almost unanimously positive.

Negative feedback was given for the Mortgage Rescue Training held in December 2009 was received from two separate interviewees both commenting that the trainer did not present the material clearly; Immigration training that reportedly did not cover any of the points that would assist in making decision regarding eligibility; A Private Rent Sector that “just asked everyone’s opinion and didn’t come up with solutions” – although the delegates had to leave early; and mortgage. However a different delegate on the Mortgage Rescue training felt that this course had been useful and was much more positive about the day.

However bearing in mind that two of those we interviewed had attended at least four different events, the vast majority of the comments we received were very positive. It was acknowledged that some speakers had not pitched their contribution at the right level for all participants, some too basic and others far too complex, but most described the events very positively. The terms “outstanding”, “excellent”, “very very good”, “Overall good” and “very accessible” were used by over 50% of the people we spoke to.

We asked is people if they personally, or their work, had benefited from attending the event and 95% agreed that they had and 95% said that they would recommend Network events to colleagues.

One delegate expressed disappointment that the recent partnership event had been put on for workers in Cornwall and hoped that a similar event for Devon would shortly be organised. Although this was specifically described as being only for people working in Cornwall, it is possible to see why examination of the topics to be covered might have led this worker from Devon to think it was not relevant. The Steering Group might wish to take heed of this when writing course descriptions in future, and possibly clarify if an event would be suitable for everyone or for a particular geographic or other community.

One previous delegate who has a strategic remit suggested the following: “I’d like to see input into the programme from strategic groups who raise training issues as part of their action plans. For instance, the Devon Area Housing Plan has ‘training and awareness raising of housing staff in relation to vulnerable adults protocol’. This would ideally be facilitated through the DCTN, with Housing Association/Local Authority housing officers attending together. Another example is the Plymouth Homelessness Strategy which has an action point around helping hostel workers to understand and address challenging behaviours through support planning. Again, this would ideally be facilitated through the DCTN, and some really good quality training could be organised at low cost to each

organisation.” This is a very useful suggestion for Steering Group to consider for the future.

#### **4.2.2. Training Feedback - Member Organisations**

Most of those we spoke to did not have access to or keep detailed records of how many people they sent on DCTN organised training events each year. The smaller RSLs and the not-for-profit organisations were able to give us accurate figures. The N-F-Ps tended to only take up a few places each year (ranging from 2-3 on average).

Most of those interviewed experienced no, or only occasional, problems in securing places on training courses. The only course that was mentioned specifically by a number of respondents was the NLP which appears to be very popular and well received, with delegates who attended it returning to their agency and recommending the course, which results in demand outstripping supply.

There was a perception from a small number of N-F-Ps and RSLs that the training was mostly designed for Local Authorities and that consideration needed to be given to broadening out the scope and range of the programme. This is a key issue for the Network as currently RSLs are the biggest single group on the Membership representing 46% of the current membership and this number could continue to grow and at least one Member commented on the need for some RSLs to raise the knowledge and skill base of their staff.

Feedback on the quality of the training available was mostly very positive. A small number of respondents felt that the quality was variable dependent on the speakers, but the majority indicated that the training was either Excellent or Very Good and extremely good value for money.

A significant number of respondents felt the network should buy-in training from other suppliers and put it on in the area. This would allow smaller and distant agencies to access training that it is currently cost- and time-prohibitive.

### **4.3 Location and Venues**

The available details of the core programmes events held over the past three years:

<b>CORNWALL</b>		
Bodmin	3	9%
Wadebridge	1	3%
St Agnes	1	3%
St Austell	1	3%
Camborne	1	3%
<b>TOTAL</b>	<b>7</b>	<b>20%</b>
<b>DEVON</b>		
Exeter	6	17%
Torquay	1	3%
Meldon, Nr Okehampton	1	3%
Plymouth	7	20%
Totnes	11	32%
Newton Abbot	1	3%
Embercombe, High Ashton, Nr Exeter	1	3%
<b>TOTAL</b>	<b>28</b>	<b>80%</b>

Steering Group members commented that they tried to spread the course across the two counties and look at where previous events had taken place and where there is existing unmet demand. On occasion the course is arranged at a venue that is most convenient for the Group member.

#### **4.3.1. Location of Training – Feedback from Previous Delegates**

The issue of parking and venues was not raised during our interviews, although one delegate attended an event that was very difficult to find – she described it as off the A38 and we assume that this was Embercombe. She stated that the instructions, map, postcode etc were fine and that it was just a difficult venue to find.

Everyone we spoke to admitted that their preferred location for training was close to where they worked/lived. One respondent commented that more local venues made it easier to gain management approval to attend as approval for travel expenses is getting more and more difficult to obtain.

#### **4.3.2. Location of Training – Feedback from Member Organisations**

Not surprisingly the preferred venue for events depended on where the organisation was based. Those in Cornwall preferred Cornish Venues and it was the same picture in Devon. Plymouth did crop up more frequently as it almost bestrides the two counties and is on the main transport routes, and Exeter was a popular venue for many Devon Members. There were a number of respondents in Cornwall who only gave Cornish locations as a preference.

### **4.4 Topics/Subjects for Future Training**

The most recent report prepared for the Steering Group informed the development of the 2009/2010 programme.

Data has been collated from Evaluation forms completed throughout the 2009/2010 programme and has been utilised to create the Table below:

Fig 1: Future courses suggested by delegates on course evaluation forms 09/10

<b>Knowledge</b>	<b>Skills</b>	<b>Other</b>
Health and Safety in communal areas – housing and land	Planning & Affordable Housing delivery/writing funding bids	Renewable Energy for existing housing stock
Understanding Housing management responsibilities	Working with difficult/challenging single homeless to move them on	Retro fitting/Planning/Housing and Econ Development – local builders/local products/skills/apprentices
Housing Finance	Assessment & Motivational skills	Financial Viability and Development
Mortgage Rescue from start to finish		Engagement methods and funding
Homelessness Prevention and Housing Options – good practice		Concept of ending tenancies for life
Private Rented Sector		Ongoing means testing of eligibility for social housing

HMOs including licensable and non-licensable		Affordable housing and private sector – empty homes and planning issues
HMO Inspections		
Mould growth in housing		

#### **4.4.1. Future Training – Feedback from Previous Delegates**

Fig 2: Subjects Members would like to see included in the core programme (free to Members at the point of delivery)

<b>Knowledge</b>	<b>Skills</b>	<b>Other</b>
Welfare Benefits – an overview of all Benefits		
Mortgage Rescue – more detailed		
Funding for non-priority clients		
Housing Standards for maintenance staff		
Repeat the Housing/homelessness and worklessness		

#### **4.4.2 Additional Comments - from Previous Delegates**

One previous delegate made the following comments which we include in their entirety:

“In my opinion, this training network will become more strategically relevant as financial restrictions increase. Already, work-related conferences and training events are unlikely to be agreed if there’s any additional cost, and organizations will be looking for more creative ways to meet training needs identified through appraisals/strategic development, at fairly low cost.

I wonder if it might be a good idea for the DCTN to monitor external training provided and send a representative to those that are strategically relevant from the network – who would then be responsible for facilitating an information sharing event more locally? This might be a good way to ensure that we all stay up to date in what will be a very difficult time.”

#### **4.4.3 Future Training – Feedback from Member Organisations**

Fig 3: Subjects Members would like to see included in the core programme (free to Members at the point of delivery)

<b>Knowledge</b>	<b>Skills</b>	<b>Other</b>
Welfare Benefits x 2	Handling Violence and Aggression	Board Member Training
Housing Law Updates	Personal Safety	IT Training
Non-occupation and intent to return		Delivery of Affordable Housing without HCA Grant
Debt and Money Advice		Risk Assessment and Management
Health and Safety		Increasing Options for People with Mental Health Issues

Fig 4: Subjects Members would be willing to pay for if the Network arranged for courses to be delivered locally:

Knowledge	Skills	Other
Shelter: Rights and remedies for people in Debt	Personal Safety	Embargo on any expenditure on training
Shelter: Homeless Provision Beyond the Housing Act 1996 (amended)		Board and Member Training
Welfare benefits		IT Training
Housing Law Updates		Risk Assessment and Management
Health and Safety		

## **4.5 Administration of Training**

All the feedback we received from the Steering Group members, delegates and member agencies was extremely positive about the administration of the Network and of training events. Everyone reported that course information was sent out in a timely manner and was always clear. Many commented that they were contacted if there were cancellations in order that they could take up more places and that the mailings were clear, focussed and informative. Feedback about the performance of the current post-holder was unanimously extremely positive. Her thorough, detailed, considered and positive approach was highly valued by all members of the Steering Group.

### **4.5.1. Administration of Training – Feedback from Previous Delegates**

The previous delegates' feedback was very positive in this area. Comments included "Well organised throughout", "Booking was easy, received a confirmation email, and all very smooth", and "Very Good". Many commented that they received regular emails giving course information and they these were very clear, useful and arrived at the right frequency.

### **4.5.2. Administration of Training - Feedback from Member Organisations**

The Members' feedback was extremely positive in this area. Comments included, "Always very smooth run" and "A pleasure to deal with", "All good" and "Very well organised". Members felt training opportunities were well and clearly advertised and bookings and course information were well prepared and sent out in a timely manner.

The only issue identified by at least two of the Members were organisational issues within their own agency. They indicated that if there was a single named person who had responsibility for distributing information internally and handling the bookings their organisation might take up available places in a more systematic manner and gain better value from their Membership.

## **4.6 Accreditation of Training**

Members of the Steering Group felt that there is a diversity in the quality of training events, as there is not a great deal of consistency in the arranging of events and the devising of content. A template for the organisation of training was suggested by a number of Members which could be the first step in minimising the variable quality and usefulness of events. The idea of having the training accredited was welcomed by most members. Much work has already gone into planning the accreditation of local training, eg the work that Lisa

Jennings is undertaking with the Devon Housing Options Group. The Network has well-established links with this Group and with the University of the West of England and is well-positioned to start this process.

It was felt that if the training carried CPD (Continuing Person or Professional Development) status it would be more attractive. This would also be an indication of quality and relevance. At a time when Members will be considering their budgets and looking for areas to cut, it is vital that the Network looks for added value. Annual membership fees for CPD Certification are £1750 + VAT.

Steps towards accreditation and CPR point/hours could be positive measures to protect the Network's future.

## **5.0 STAFFING**

### **5.1 Training Administrator**

We reviewed the job description for the position and it is clear that there are vital elements of the role that are not fulfilled due to time constraints. The key elements of the JD that are not fulfilled include:

- Programme Development
- Marketing, Promotion and Communication
- Administer the Annual conference

Concern was expressed about the workload of the Training Administrator. This position is funded for three days per week. There is an expectation that she will travel to training events to check that all is well and then travel back to the office again: many questioned if this was an effective use of her time. We understand that much of her time is taken up with some very basic clerical tasks such as training pack preparation, photocopying, stapling etc, and chasing up Steering Group members for information and confirmation of actions. Whilst she has been paid for additional hours in the past, she has, on occasion, personally paid her young daughter for carrying out clerical tasks, neither of these is a long-term or totally satisfactory solution to the issue. A full review should be undertaken into the best use of her time and what additional recourses are required to meet the support needs of the network.

The task of planning an event, arranging speakers, identifying a venue etc lies with a member of the Steering Group, and the Training Administrator has the task of administering this once all these arrangements have been made. The Training Administrator's position is at the end of a chain and her actions depend on Steering Group members completing their tasks in a timely manner. This system is clearly frustrating for the post holder, impacts on the effective operation of the Network and appears to generate a great deal of duplication of activities. There is an urgent need to review the Training Administrator role and make changes that make the best use of the skills and experience of the post holder and investigate alternative mechanisms that can deliver the more basic clerical support that is required.

## **6.0 FINANCE**

The Network's funds come from annual membership fees, £395, £130 and £50, dependent on the organisation/individual's status

The Network currently has a reasonably healthy bank balance which it could utilise to fund future developments or staff. The bank balance is currently at its highest levels as membership fees have just been paid and the new training programme and staff costs will be funded from this for the rest of the year.

Whilst the DCTN has a constitution and operates as a not-for-profit organisation, it is not a registered charity, friendly society, formal Partnership or similar legal entity. It is registered for VAT and submits VAT returns but does not submit any other returns to HMRC. Currently the organisation's income exceeds its expenditure and it has managed to accumulate reserves in excess of £20,000 which are held on deposit.

DCTN does not have any public liability insurance or similar, to cover any situations or claims that might arise from its operations.

As the Network's aims are educational it would be possible to seek charitable status. Status as a social enterprise agency or not-for-profit (charitable) organisation would create some opportunities for fundraising and development, but would require the organisation to become more formally constituted.

References to a bid for LSC (Learning and Skills Council) funding including "soft Skills" and linkage to the work facilitated by Lisa Jennings, Devon Housing Options Partnership Manager, were noted in the minutes of the Steering Group of November 2009. This was due to be discussed further at the next Steering Group Meeting, but this was deferred at the meeting of 4 February and at the meeting of 17 March it was agreed to undertake an extensive survey of the membership regarding future training requirements. This survey had a three month deadline (mid-June 2010). The draft brief was brought to the meeting on 12 May for circulation to all members for final approval. It would appear that the original funding initiative has now evolved into this Review exercise.

## **7.0 THE TRAINING SECTOR**

There are a range of training providers in this sector, but few operate across Devon and Cornwall. We were able to find few courses available from SITRA and the closest they get to Devon and Cornwall is Taunton. The Chartered Institute of Housing responds to demand and only has 4 courses arranged for Bristol between July 2010 and March 2011. We understand they will respond to a local approach and put on training and this might be a useful relationship for the Network to cultivate.

There is a clear need to cultivate relationships with providers and develop the Network's "brokerage" capacity. If members are to benefit further the Network should become more responsive and seek to meet local need. The Network needs to empower its Training Administrator or a designated manager to make decisions between meetings to maximise effectiveness and to take advantage of opportunities that present.

## **RECOMMENDATIONS**

Our research highlights that DCTN is at an important stage in its development and that some key decisions regarding its future size, function and structure need to be made. Key to the next step in the Network's life is whether it should remain as it is with minor changes to staffing or whether it should restructure and expand. Utilising the current economic situation to position itself and enter into new partnerships and relationships.

In the light of the key decisions that need to be made we recommend a series of actions for the Steering Group to consider.

### **8.0 MAINTENANCE-V-GROWTH**

The Network/Steering Group to:

- Consider, and possibly consult membership, about growing the organisation – this will fundamentally change the cosy and comfortable nature of the organisation. The Network is poised and could experience a period of rapid growth.
- Investigate a change to its legal structure – eg apply for charitable status etc
- Recognise that the current economic climate presents an opportunity to make stronger links with strategic players in the two counties, organise events and buy in training for members and partners
- Develop strong support, managerial and developmental structures to underpin its continued existence
- Undertake a root and branch review of its constitution and organisation with professional assistance in order to make a decision about what legal entity it is and if there are any advantages to changing this.
- Create mechanisms to foster a real feeling of ownership amongst its membership
- Undertake a comprehensive risk assessment before making decisions about its future development
- Utilise its excellent contacts across the two counties to consult its membership and plan for the future
- Make a firm commitment to further professionalise the organisation whilst recognising that this is in no way a criticism of its past activities or services. The Network needs to formally acknowledge that the world is changing very quickly.
- Review its primary drivers and functions and consider whether it should be primarily a “housing agency” or whether it can become a more broad organisation. – is it training and learning-led organisation or is it housing- and homelessness-led?
- Review its geographical boundaries and consider whether there is any benefit in including part or all of Somerset within its umbrella
- Seek assistance to identify potential liabilities or problem areas for Members, Steering Group etc, and reformulate to minimise these

### **9.0 MEMBERSHIP**

The Network/Steering Group to:

- Enable the Training Administrator to spend more time servicing Members – visits – telephone and email liaison, etc
- Work with the Training Administrator to develop marketing strategies for the service

The Network/Steering Group/Training Administrator:

- Commit resources and time to make improving knowledge and awareness of the Network a priority. In these difficult financial times it is vital that Members truly appreciate the value of the Network – eg £20 per head for high quality local training etc
- Investigate opportunities to develop membership and services for those organisations that hold Supporting People contracts.
- Strive to position itself with Members to ensure that the service is high-profile and valued, so that terminating membership to save money is inconceivable.
- Pro-actively seek new Members from specific sectors, eg RSLs, N-F-P, and cater for their training needs.

## **10.0 TRAINING and Events**

The Network/Steering Group to:

- Build closer and more formal links with its members and utilise data held by them on training needs and priorities to assist in devising the annual programme.
- Develop a more systematic approach to planning training programmes.
- Assist in identifying topics and speakers for the training programme, but remit all other aspects of course organisation to the Training Administrator or other paid staff.
- Investigate potential partnerships with major training providers in order to facilitate the development of “purchased” training/develop training broker function

The Network/Steering Group/Training Administrator:

- Develop a template for the organisation of training events to unify the process and minimise organisational errors.
- Develop a system of rating the level of courses to assist bookings.
- Work with other strategic partnerships and agencies in the region to identify gaps in training provision and create mechanisms to fill these gaps.
- Investigate accreditation and/or CPD points/hours.
- Develop close working links with the Learning and Skills council/UW/CHI etc
- Investigate the development of a programme of more bought-in training that would be “re-sellable” to a wide range of organisations and departments within Member organisations eg benefits overview, health and safety, risk assessment etc
- Review the training delivered in Cornwall and proactively endeavour to get more take-up from the area to demonstrate that these Members get value for money

## **11.0 STAFFING**

The Network/Steering Group to:

- Undertake a full review of the role of the Training Administrator and the staffing requirements of the Network.
- Work with the Training Administrator find alternative methods of performing the more basic clerical functions. Suggestions include a paid post for a day per week, an apprentice or other training role (which would sit very well with a training agency).
- Develop a mechanism to enable the Training Administrator to undertake the marketing, promotional, developmental and liaison functions of the network.

- Investigate the possibility of paid management (part-time) – either for a fixed term to develop and reshape the service or ongoing.
- Start making plans for the future of employed staff after the end of the current SLA.

## **12.0 STEERING GROUP**

The Network/Steering Group to:

- Review the constitution – to include consideration of changes to the right of all member organisations to sending representatives to steering group meetings.
- Reformulate the Steering Group – role, membership, objectives etc.
- Review the Steering Group’s function to become focussed on strategic direction, project management, review and development
- Review and identify skills, sectors, knowledge, and locations that should be represented on the Group.
- Look outside membership organisations for key skills and knowledge.
- Develop a clear “Job-Description” and task list to be given to all potential Steering Group Members.
- Work to retain the “cosy and informal” feeling of the Steering Group but accept the need to refocus and professionalise all aspects of the service including the Steering Group’s meetings
- Review the format and content of Minutes to maximise their usefulness beyond the Group.

## **13.0 FINANCE**

The Network/Steering Group:

- Consider utilising some of the funds held as reserves to develop and grow the organisation – additional admin time, management time etc
- Review its financial position once key decisions concerning the future structure, role and constitution of the organisation has been agreed
- Consider its future structure, function and development when setting the level of future membership fees

## **14.0 CONCLUSION**

DCTN has evolved over an extended period and provides a service to its Members that is highly regarded and very useful. Many of its operational structures have changed little in the past 10-15 years. The network relies very heavily on the input and time of its Steering Group members and the willingness of the paid Training Administrator to work extra hours to fill in gaps. The fairly low fee level of £395 (or less) each year has, thus far, kept the service under any cost-cutter’s radar. Many of those involved acknowledged that this situation is unlikely to be unsustainable for much longer.

The current economic situation could provide an opportunity for the Network to reposition itself as a key broker and provider of local affordable training. It has already shown that it is not purely focussed on housing by running the very successful NLP training.

The Network is extremely efficiently run but there are some key areas within the Training Administrator’s role that are not addressed due to lack of time. More focus on marketing

and liaison with Members to remind them of the presence of the Network, constant repetition of the mantra “Quality local training at only £20 per head” and a “how can we help you meet your organisational training needs” should stop Members looking for budgetary savings, from cancelling their Membership.

The Network has an opportunity to re-examine its structure and operations and create a structure, culture and service that will continue and grow for the foreseeable future. It is ideally placed to offer a unique service in Devon and Cornwall at a time when deep budgetary cuts are being announced, and can utilise this opportunity to expand and develop its services into other areas of training.

JANE FILBY AND BRIAN MOORE  
19 July 2010