

**FIGURE 8**  
CONSULTANCY SERVICES LTD

**2017**

**External Evaluation of Borders Voluntary Care Voice  
and Borders Care Learning Network  
EXECUTIVE SUMMARY**



Figure 8 Consultancy Services Ltd

First Floor

30 Whitehall Street

Dundee

DD1 4AF

01382 224846

[enquiries@f8c.co.uk](mailto:enquiries@f8c.co.uk)

[www.f8c.co.uk](http://www.f8c.co.uk)

**EVIDENCE INTO PRACTICE**

## LEAD CONTACT

### Andy Perkins

Director (Figure 8 Consultancy Services) - 1st Floor, 30 Whitehall Street, Dundee. DD1 4AF.

📞 01382 224846 (office) – 07949 775026 (mobile) ✉ [andyperkins@f8c.co.uk](mailto:andyperkins@f8c.co.uk) 🌐 [www.f8c.co.uk](http://www.f8c.co.uk)

## REVIEW TEAM

Andy Perkins (Managing Director)

David McCue (Associate Consultant)

Donna Nicholas (Senior Researcher)

Jennifer Turnbull (Administrator)

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# EXECUTIVE SUMMARY

## Introduction

Borders Voluntary Care Voice (BVCV) incorporated as a Scottish Charitable Incorporated Organisation (SCIO) in 2013 and was established originally as a Community Care Forum in 1991. It exists primarily to enable service users and carers accessing social care and health to have a voice at all levels in the planning, delivery and review of services. Its secondary purpose is to represent and at times develop the third sector in health and social care and keep them informed and engaged in strategic direction of joint planning. It is a membership organisation consisting of individuals and organisations, currently at around 80 members. It operates only in the Scottish Borders.

BVCV is currently funded solely by a contract with SBC and NHS Borders to provide:

*"Independent development support for service users, carer and third sector involvement in the planning and provision of community care."*

The Aims of BVCV, as stated on the charity's website and in its Business Delivery Plan 2015-18 are:

- **"Aim 1: A strong third health and social care sector in the Scottish Borders.**  
*We support third sector health and social care organisations to develop and work together, raising and progressing common issues as one voice. The third care sector is facilitated to better share resources and best practice. We work in partnership to develop and establish new services where needs are identified.*
- **Aim 2: A strong voice for users and carers of health and social care services in the Scottish Borders.**  
*We support and enable users and carers accessing adult health and social care services to have a voice and influence service planning and delivery in the Scottish Borders.*
- **Aim 3: Health and social care services in the Scottish Borders are involved and informed in strategic direction.**  
*We represent third sector health and social care organisations in community planning and facilitate partnership and information sharing forums to support joint working across all sectors.*
- **Aim 4: A strong and effective Borders Voluntary Care Voice.**  
*We are a robust and sustainable organisation with good governance and engagement from its membership."*

## Borders Care Learning Network (BCLN)

Borders Care Learning Network (BCLN) is the training arm of Borders Voluntary Care Voice.

It runs an extensive training programme, with a range of free courses for care workers, volunteers and carers.

## The Task

In July 2016, the Board of BVCV commissioned Figure 8 Consultancy Services Ltd. to conduct an external evaluation of Borders Voluntary Care Voice and Borders Care Learning Network.

The Aims and Objectives for the evaluation were identified as:

- To measure success against the objectives and outcomes identified by BVCV's vision and business plan in order to demonstrate effectiveness, particularly to funders.
- To identify areas of development needed to increase membership and further engage existing members in meaningful way.

The study was conducted in five phases. Each phase was tailored to the needs of the study, requiring a mix of data collection methods (qualitative and quantitative), and sample populations.

### Summary of Study Methods

Phase 1	Method	
<b>Rapid Review of Evidence</b>	Desk-based review	<ul style="list-style-type: none"><li>• All relevant documentation currently held by BVCV and BCLN (e.g. training evaluations), which demonstrate or signal current and previous compliance related performance (including financial) and general progress against the service specification agreed with funders (Scottish Borders Council and NHS Borders).</li><li>• Review used to identify key areas of exploration for fieldwork.</li></ul>
Phase 2	Method	Sample
<b>Fieldwork</b>	Stakeholder Survey	<ul style="list-style-type: none"><li>• Aimed at members, non-members and user/carer fora. The survey asked respondents to rate statements regarding BVCV and BCLN, as well as allowing an opportunity to provide comments and suggestions.</li></ul>
	Semi-structured interviews	<ul style="list-style-type: none"><li>• Current staff members</li><li>• Current Board members</li><li>• Key funders (SBC and NHS Borders)</li></ul>
	Open discussion workshop (World Café style)	<ul style="list-style-type: none"><li>• Aimed primarily at the four user/carer fora.</li></ul>
Phase 3	Method	
<b>Data Analysis</b>	Consideration of all the data collected to inform conclusions relating to the outcomes of BVCV/BCLN across the Scottish Borders.	
Phase 4	Method	
<b>Reporting</b>	Analysis and write up of all findings in order to clearly meet the study objectives.	

The primary approach used for conducting semi-structured interviews and the open discussion workshop session was the Appreciative Inquiry (AI) method.

AI is an approach that focuses on positive aspects of a service, programme, project or other area of enquiry. Its aim is to encourage conversation about positive experiences as well as to unearth difficulties and problems. It sets a balanced emotional tone (although it invites emotional expression), and facilitates trust. Conversations using AI tend to have more depth and energy than standard interviews.

Typically, AI is characterised by four stages:

- Discovery - Appreciating and valuing the best of 'what is'.
- Dream – Envisioning 'what might be' [i.e. aspirations for the future].
- Design – Determining 'what should be'.
- Delivery (or Destiny) – Innovating 'what will be'.

## Key Findings

In conducting this review, we conducted in-depth interviews with the current Board and staff members of BVCV, as well as with the two key funding officers from Scottish Borders Council and NHS Borders. We also conducted an Open Discussion workshop with 15 wider stakeholders and received 41 responses to an online survey. A wide range of views were expressed to the review team during the course of the fieldwork; the breadth of which has been summarised in the previous sections.

Overall, the balance of views expressed was overwhelmingly positive about the work and leadership of BVCV as a membership organisation in the Scottish Borders; with only a handful of negative views expressed. The Evaluation team have been particularly impressed by the resilience of the organisation over many years to have grown, developed and established itself with an excellent reputation across a broad range of stakeholders - despite facing several significant organisational challenges along the way. The commitment of both the staff and Board within the organisation is evident to all – and commented upon by numerous stakeholders. There is also clear potential for the organisation to expand its role and remit to provide a stronger voice, not just for service users and carers, but also for and on behalf of the Third Sector in the Borders.

The key challenges for BVCV identified through this evaluation sit around:

- Remit (developing a clear position statement around the remit of the organisation, through discussion and negotiation with BVCV funders, which then needs to be communicated widely to all key stakeholders);
- Roles and responsibilities (of all staff and Board members in light of negotiations surrounding the future 'remit' of the organisation; as well as agreeing a clear role and responsibilities for the organisation in respect of being a voice for the Third Sector in the Borders); and

- Capacity (in respect of both current BVCV staff, who are working at or over capacity, and Board members due to the limited number of current Board members).

There was unanimity of views in relation to the current strengths of the organisation (mainly centred around having a very strong, flexible, knowledgeable and hard-working staff team and skilled Board). Views were more disparate in relation to the perceived performance of the organisation against the key aims of BVCV.

## **Recommendations**

The following recommendations are derived from the evidence, including the evaluation's findings, literature and other information obtained by the evaluation team; as well as wider observations made by the evaluation team. The following recommendations (grouped by themes) are provided for consideration by the Board of BVCV:

### **THEME 1 - VISION**

#### **RECOMMENDATION 1**

Some clarity is required over the role and remit of BVCV due to differing perceptions across some stakeholder groups. This in turn will provide a proactive marketing opportunity to raise awareness and increase membership levels.

#### **RECOMMENDATION 2**

Proactive discussion should be undertaken with NHS Borders and Scottish Borders Council to explore the possibility of BVCV taking an enhanced (defined) role for being the voice of the third sector in the Borders and not just of service users and carers. This discussion should take place in the context of reviewing and agreeing any future service contract that BVCV enters into.

### **THEME 2 - GOVERNANCE**

#### **RECOMMENDATION 3**

Consideration should be given to exploring options for accessing/applying for free consultancy and training which is available to third sector organisations to help strengthen both the development of the organisation and its governance. Such consultancy and training is provided by The Cranfield Trust and Charity Days, and further information is available at:

- Cranfield Trust – Management Consultancy: <http://www.cranfieldtrust.org/free-management-consultancy>
- Cranfield Trust – Training Opportunities: <http://www.cranfieldtrust.org/events>
- Charity Days – Training Opportunities: <http://www.ukcharitydays.co.uk/>

## **RECOMMENDATION 4**

Develop a recruitment and leadership plan for BVCV's Board of Trustees to promote the right skills mix as well as balance of professionals, current and former service users, carers and other stakeholders. This will require a robust Trustee induction and training programme to be implemented, as well as a plan in respect of collaborative, partnership / consortium and co-production approaches to working.

## **RECOMMENDATION 5**

Review and change the title of the BVCV's lead operations officer from 'Coordinator', which does not imply the most senior role or promote leadership.

### **THEME 3 - STAFFING**

## **RECOMMENDATION 6**

Given the capacity issues that the current staff are working with, there is a need to monitor and ensure adequate levels of support, supervision and appraisal are provided for all staff (including the Coordinator).

### **THEME 4 - FINANCE AND RESOURCES**

## **RECOMMENDATION 7**

Develop a fundraising plan to maximise income diversification and aid the charity's strategic aspiration to expand and grow.

### **THEME 5 - REACH**

## **RECOMMENDATION 8**

Review ways to achieve greater reach through delivering BVCV services in the entire region including outlying areas, taking account of the geography and challenging rurality of the Scottish Borders.

## **RECOMMENDATION 9**

Make increased use of modern IT related technology which can facilitate online fora, meetings and training webinars; thus plugging service gaps and increasing service user, carer and wider community engagement in BVCV's activities.

## **RECOMMENDATION 10**

Explore customer demand in respect of 'stigma' and address this through the publication of a number of short thematic guides, working collaboratively with the broad range of relevant

stakeholders – potential topics may include service user involvement, carer involvement and mental health.

## **THEME 6 - TRAINING**

### **RECOMMENDATION 11**

Adopt Kirkpatrick's Four-Level Training Evaluation Model (see section 8) to revise and enhance the current BCLN Training Evaluation system, including consideration of conducting brief pre- and post-training surveys (online and/or telephone).

### **RECOMMENDATION 12**

Explore options for a greater level of joint training in collaboration with NHS Borders, Scottish Borders Council and other third sector organisations.

### **RECOMMENDATION 13**

Introduce bi-annual learning and sharing events; targeted at service users, carers, professionals and other relevant stakeholders such as community activists/champions.

## **THEME 7 - QUALITY ASSURANCE**

### **RECOMMENDATION 14**

Improve BVCV's information resources by considering Information Standard accreditation. The Scottish National Standards were compiled with the assistance of advice providers in the voluntary and statutory sectors. The Standards are a framework for the development of effective and efficient services and were compiled in recognition of the fact that people choose to access information and advice from various sources.

The Scottish Government has funded a new three-year cycle (November 2016 – November 2019) in which advice providers can go through the new process for accreditation or re-accreditation for free.

For further information please see: <http://www.gov.scot/Topics/Justice/policies/widening-access/standardsforadvisers>).

### **RECOMMENDATION 15**

Consider introducing a Quality Management System into BVCV such as the Public Services Improvement Framework (PSIF).

### **RECOMMENDATION 16**

Encourage NHS Borders/Scottish Borders to participate in a 2-way secondment pilot with BVCV in relation to a specific business area (to be determined) to help break down barriers and improve knowledge and trust.