

Creating Effective Representation and Participation

A guide for Voluntary Sector Representatives, Councils for Voluntary Service and Statutory Sector Partners



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About

This guide has been produced to help support effective voluntary sector representation in partnership working.

Formed in 2004, DACVS works to support the voluntary and community sector (VCS) develop and improve its contribution to the lives of citizens in the sub-region.

The Partnership adopts the working principle of 'local focus, county voice.'

This recognises the value and benefits of developing common policy positions at a strategic level while retaining local identity and meeting the diverse needs of the sub-region through local delivery.

This commitment underpins the strategic objectives of DACVS.

The DACVS Partnership

The Partnership covers the geographical region of Devon, covering North Devon, Torridge, Mid Devon, East Devon, Exeter, West Devon, Teignbridge and the South Hams (but not Plymouth and Torbay). Its activities are governed by the Chief Officers of the local Councils for Voluntary Service (CVSs). Find out more about DACVS at www.dacvs.org.uk.

Acknowledgements

Research and best practice was sought from other partnerships and CVS in other regions. The principles and practices notably from Voscur and Herts CVS partnership have supported in the building of the materials and processes for supporting effective representation.

Introduction

Voluntary and community organisations are uniquely placed to:

- identify and stand up for the needs of disadvantaged people in the community
- contribute to the planning and review of public services
- develop and deliver services of their own, where appropriate and on behalf of the public sector.

A wide variety of partnerships and partnership meetings provide the context in which the voluntary sector can exercise the above roles. Partnerships operate at a range of levels (regional, county, district). Partnerships have different themes or target client groups (eg community safety, the elderly) and vary in size and degree of formality.

Partnerships are the public interface between voluntary and statutory agencies and because each sector brings its own culture, values and priorities, they also provide the forum where the relationship between the sectors can either thrive or flounder.

A Compact for Devon was produced to provide a framework for the development of positive relationships between the sectors. For partnership managers, chairs of partnerships and for the CVS as the district's voluntary sector infrastructure organisations, the challenge is to know what to do to help bring this about.

Partnership working provides a particular challenge to the voluntary sector because of the number, size and diversity of voluntary and community sector organisations.

The long-term aim is for effective and genuine representation of the sector as a whole.

Representation takes place in a wide range of contexts. A representative setting may be called a partnership, network, forum or planning group.

Settings operate at different levels. A partnership may be strategic and operate at regional, county or district level while a planning group may

seek to co-ordinate local services across a district or neighbourhood area. Representatives from voluntary organisations are needed at most levels.

Current arrangements for the engagement of voluntary sector representatives in partnerships and planning groups have developed piece-meal across a range of service areas. There will be strengths and weaknesses in these arrangements. Being clear about who represents whom in a given context is a crucial element of effective representation. Everyone needs to have the same shared understanding.

Identifying Your Representatives

Everyone needs to have the same shared understanding.

Being clear also helps representatives manage conflicts of interest
Identifying the context which arise in representational work .

As a voluntary sector representative, your representees may be:

- your own organisation and its work
- your own organisation's actual or potential beneficiaries
- your target group generally
- other organisations that do similar work
- other voluntary sector organisations
- local citizens through yourself.

The following example illustrates the problem:

The Chair of a local children's support charity sits on a Youth Partnership. S/he believes s/he is representing the interests of local children who benefit or who could benefit from the charity's services.

Statutory partners however, believe the person is speaking for the voluntary youth sector as a whole.

The Representational Process

How does it all work?

The following list of key areas should be considered by representatives in order to undertake their role effectively:

- The context in which representation takes place must be specified. The remit or capacity of the representative to act or speak with and without out consultation must be defined
- The time/commitment involved must be specified
- The representative will canvas the views and opinions of the representees
- The representative will inform people about what is happening and what s/he has said and done.

Problems can arise when:

- statutory partners assume voluntary sector representatives have more power to act than their mandate allows
- representatives carrying out the representative role do not understand the boundaries of the responsibilities and time commitment involved
- representees do not have the means or opportunity to provide a clear mandate to their representative.

The capacity of a given role may allow the representative to undertake some or all of the following:

- commit representees to a binding commitment
- negotiate on behalf of representees
- vote as they see fit
- vote on the instruction of the representees
- voice the perspective of the representees
- observe only.

It is essential that the capacity of the role to act, speak or observe, is clearly stated.

A representative also needs to know how long they are expected to exercise the role. If there is no duration proposed, it is better to suggest a time commitment. This guards against people over-staying their welcome in the absence of a formal re-selection date and against people abandoning the role without notice.

Finding Representatives

Selection and selection tools

The most effective system of representation involves the representee in the processes of selection and possible deselection of the representative.

People from the voluntary and community sector may find themselves in a representative role because they are:

- asked by their Manager or Chair
- invited by a statutory partner
- asked by a voluntary sector partner
- required as a non-negotiable part of a job description
- self-elected by individual choice
- selected by forum or network.

Unless representees are already involved or become more involved in selection, the representative role is weakened.

Selection by Election

While representatives may have to be appointed in the early development of a representative system, it is desirable that where possible, representees should be able to select their representative. The most open method is selection by election.

Elections should involve processes similar to those used at formal AGMs.

There should be:

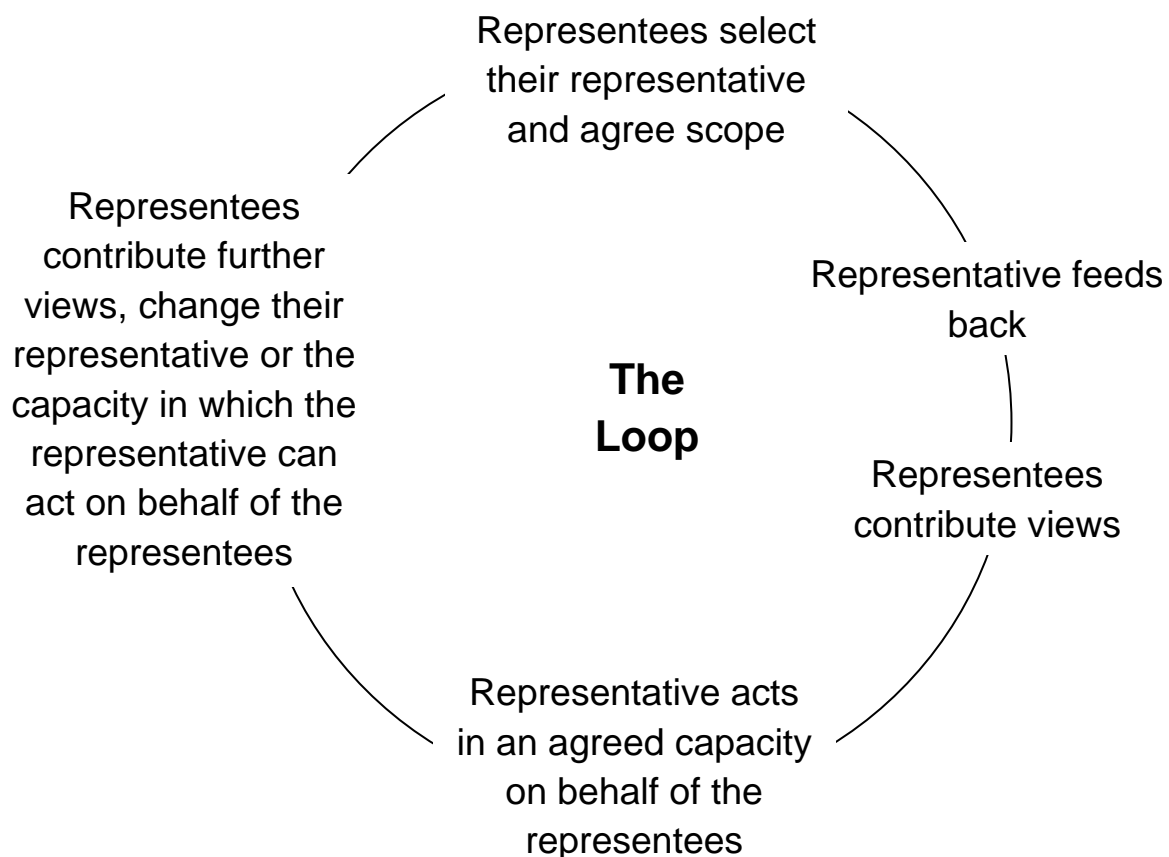
- a formal nomination process with deadlines
- information circulated about candidates' suitability for the role
- a chance for candidates to explain their position on relevant issues
- a chance for voters to question the candidates
- a secret ballot (preferably) with a postal vote option
- a clear voting system.

Consultation and the Tools to Use

The Consultative Loop

The consultative loop is a circular process which starts at the selection stage and involves the representative in canvassing the views of representees before exercising the role. Unless engaged at the start of the loop, representees may soon lose interest. This is often the weakest element in the representational process.

After representation, representees must receive feedback in order to remain engaged in the process. This also ensures that representatives are accountable.



Consultative Tools

Consultation requires effort and time. Which of the tools listed in this checklist do you use? Some are better for feed-in and some for feedback. The tools you use should be agreed with representees and proportionate to the task.

| Tool | Suitable for feeding in? | Suitable for feeding out? |
|---|---|--|
| Formal structured 1:1 interviews | Yes - can be a telephone interview | No |
| Occasional or regular focus groups | Yes - to sample the views of individuals only | Not really as participants have no responsibility to disseminate information more widely |
| Formal meetings | Yes if properly conducted | Yes if properly conducted |
| Newsletters, circulated minutes | No | Yes |
| Informal contact by e mail, telephone, 1:1s with individuals | Yes if number of representees is small | Yes if number of representees is small |
| Regular open 'surgeries' | Yes as one channel of communication | Not really unless participant has responsibility to disseminate information |
| Conference with workshops | Yes if small groups are possible then plenary | Yes if small groups are possible and subject is suitable |
| ICT eg websites, bulletin boards, e mail, social media networks | Yes provided participants have access to and can use technology | Yes provided participants have access to and can use technology |
| Consultative draft documents | Yes if time-scale realistic and in plain English | No |
| Questionnaires | Yes | Yes if feed-back needed to gain further feed-in |

The Importance of Getting it Right

For the voluntary and community sector...

It is especially important for the voluntary sector to be accurately represented because there is a history there has been some misrepresentation.

People may claim to speak for the sector and their words are taken, to be 'representative'. Representation that does not involve the representees may lead partners to make false assumptions and propose inappropriate solutions.

People carrying out the role outside a robust structure for communication and accountability, expose themselves to criticism and may undermine their personal and professional credibility within the sector and with partners.

There is a danger that processes, however faulty, become acceptable even if they are redundant in representational terms.

People in 'representative' positions potentially could become over-powerful and subvert their role to their own personal advantage or that of their organisation.

The drive to involve the voluntary sector in a range of partnerships and planning groups at district and county levels, has required many people in the sector to operate as if they are representatives before a representative structure has been developed, resourced and agreed. This applies to people from CVSs as much as to people in front-line organisations.

For statutory partners

Statutory partners have an equal interest in enabling effective voluntary sector representation. They need the active participation of the sector on a range of partnerships to fulfil their obligations to government to provide user-focused, cost-effective public services. The attendance of

randomly-appointed people from the sector on partnerships may meet an immediate need to include the sector.

But, there is no long-term sustainability or benefit in representation that does not properly involve representees.

Improving Representation

Improving the infrastructure of representation A model structure - the role of the CVS

NAVCA (formerly NACVS) recommends CVSs to develop a robust and manageable structure for representation, communication and accountability within the sector. Structures which CVSs undertake within their representational core function are:

- trustee board support and constitutional sanction for the scale and level of representational work in each organisation
- an accurate overview by the CVS of all representational activity
- sector-wide selection/election mechanisms
- formal consultation mechanisms such as forums, seminars and conferences where short, medium and long-term issues can be discussed
- alternative opportunities for consultation with excluded communities
- maximum use of electronic and paper-based communication to inform and consult within and across organisations
- support and training for a pool of people in the sector capable of taking an 'umbrella' viewpoint of issues and deploying the required skills
- formal and informal opportunities at all levels to educate statutory partners about the sector and to learn about other sectors
- personal contact and effective relationships with partners and politicians especially where formal structures are weak and agreements absent
- clearly articulated voluntary sector positions based on local evidence and information
- reference to Compact arrangements to improve joint working.

A model framework for improving the resourcing of representation

There is pressure on CVSs and front-line voluntary and community organisations to become involved in an increasing number of partnerships and groups. It may suit some statutory partners to assume that the amount of funding they are willing to provide CVSs and lead specialist organisations for this work (if any) buys an unlimited amount of time and involvement but this is unrealistic.

Many front-line organisations recognise the need to become involved in partnerships but find that the time, travel and administrative costs are prohibitive and make consistent attendance impossible.

CVSs therefore aim to:

- accurately scope, cost and agree a model of CVS representational activity including consultation with the sector
- scope and cost a model of support for the whole sector
- reflect CVS representational activities and costs in the business plan
- reflect the full-costs of representation and the enablement of representation in their fundraising
- advocate for realistic funding and agreed SLAs for representational work including necessary research.

As part of the Representation strand of the workings of the Devon Consortium, the Devon Association of CVSs has worked together to create joint working practice and agreements in approaches supporting the roles and principles for representatives and effective representation which aim to support representatives and the representative role across Devon.

The Model of Behaviour

CVSs as models of assertive and creative behaviour

CVSs have a role to play in demonstrating assertive and creative behaviour in representational work which others in the sector can follow by:

- acting as a critical friend to statutory partners and voicing alternative viewpoints that are valued contributions to the health of partnerships
- being able to state a position clearly and constructively and being proud of what the voluntary sector has to offer
- offering to facilitate or lead a partnership where it has the resources to do so
- proposing alternative methods of consultation, planning delivery and evaluation which would benefit partnerships
- being confident about what the voluntary sector can contribute and promoting this contribution to partners
- using opportunities to work with statutory colleagues to exchange skills, ideas and experience
- cultivating allies in the statutory sector who can champion the voluntary sector and provide support in partnership debates
- encouraging plain-speaking and the expression of honest opinion and understanding of the voluntary sector context.

The Role of Statutory Partners

Statutory partners seeking effective representation need to understand the context in which voluntary sector organisation work and the constraints within which current arrangements have developed. They need to:

- understand the representational relationship and process and the largely unrepresentational nature of current arrangements
- appreciate and act on the fact that the sector is very diverse and therefore needs adequate numbers of representatives on all partnerships
- understand the need for the sector to have opportunities to meet on its own in order to form viewpoints to underpin representational work
- make allowances for the time needed by the sector to choose representatives and consult before and after meetings
- provide an effective administrative structure for partnerships
- ensure effective planning of business and conduct of meetings
- provide effective induction and support to new voluntary sector representatives
- provide clear guidance and support to Chairs of partnerships so that the conduct of business is conducive to voluntary sector engagement .

Resourcing the representation needed

Statutory partners also need to join with CVS and other infrastructure organisations in reviewing current arrangements, scoping and realistically costing improvements and in developing further arrangements to meet the costs of the level of representation needed.

Skills for Individual Representatives

Skills and Strategies for Individual Representatives

Before agreeing to take on the representative role:

Understanding what is required

A potential representative should consult a job description and person specification for the representative role which clarifies

- what actions and attributes are expected
- the scope and level of the representational role
- consultation arrangements.

Understanding your motivation

Potential representatives need to be clear about their motivation in considering possible involvement.

Are there opportunities for the representative's organisation to benefit?

This could be to:

- secure more funding
- advance their cause
- influence policy making.

To genuinely represent the sector, a representative must not be motivated solely by a desire to secure resources for or advance their own organisation however worthy. A representative may apply for funding for their own organisation but that they must not be involved in discussions about funding decisions.

Conflicts of interest in representation are unavoidable and need to be managed.

A potential representative must also be clear that their motivation and skill matches the level of representation required. Policy-making is conducted at a strategic level whereas a person may be motivated to secure funding which is discussed at a more local operational level for example.

Balancing and managing workload

Because representation involves time and attention, a cost benefit analysis of the rewards of participation against a certain amount of representational work is essential if the potential representative is to:

- manage their workload
- secure the support of the organisation for them to take on representational work.

If representational work is to be part of a person's role, it should be included in their job description and work plan and, from an organisational point of view, be included in the business plan.

In addition, a potential representative will need to know what induction, support and training arrangements exist for new representatives.

On the basis of the above, it will be possible for the potential representative to make an informed decision about whether to agree to stand for election/selection or if such arrangements do not yet exist, to take on the role.

If appointed rather than selected to undertake the role, the person must try to compensate for this lack by taking greater care to consult and give feed-back to other sector groups.

Becoming a Representative - Induction

Whether you are a new representative or you are already operating in the role, you should be able to benefit from a systematic induction. This induction should include:

Information about the role you need before you start:

- The status of the representative role - In what capacity? Acting freely or just observing and attending?
- The representees
- The time commitment of the role

- The context of the role – what is the remit of the partnership, its strategic or operational purpose
- Role description for voluntary sector representative – what is expected of you including terms of reference
- Voluntary sector representee list with names, roles and full contact details
- Consultation arrangements for receiving views and giving feedback
- Claimable expenses for travel, administration, time
- Support opportunities for voluntary sector representatives
- Training and development opportunities for representatives
- Support available for particular needs eg translation, hearing loop.

Information about the partnership you need before you start:

- Partnership membership list - names, organisations, roles, full contact details with no unexplained acronyms
- Accountability diagram - where does the partnership fit in with groups below, at the same level and above
- Calendar of meeting dates and venues and forward plan of partnership business
- How to get issues added to partnership agendas
- The style required for written reports
- Access to relevant past papers - past minutes, reviews, reports
- Source and level of administrative support.

Role description and requirements

The role of representative involves specific tasks and requires specific knowledge, skills and experience. In deciding whether you want to accept an invitation to become a representative or to stand for election/selection, you may need to consider the following requirements. If you are already operating as a representative, use the list to identify your support needs. When you become a representative, you should receive a role description relevant to the context in which you will operate. It could be based on the following model.

Sample Representative Role Description

Role Description Voluntary Sector Representative

Qualities Required

- Knowledge of the strategic and operational agenda relating to x client group
- The role of statutory partners in the planning, commissioning and delivery of services to the client group
- Experience / current experience in a voluntary sector setting of work with this client group
- Current experience in a voluntary sector infrastructure setting.

Skills

- presentation skills
- skills in preparing for and participating in meetings.

Consultative Skills

- Contacts with a wide spectrum of voluntary sector organisations working with the client group
- Consultative processes, access to networks and other processes to gain and represent opinions and views and to provide information and feedback.

Travel

- Ability to travel to a range of venues across the district/county/region
- Time commitment -availability to make most meetings
- Special support -accessible venues, hearing loop, large print.

Role Description

Name of Partnership _____

Type of Partnership Strategic/
service co-ordination _____

Level of Partnership Regional/
county/district _____

Frequency of meetings _____

Summary of Partnership Remit _____

Voluntary Sector Representation

X representatives from y organisations nominated/elected by z group.

Duties of the Role

- To participate in induction
- To consult relevant voluntary sector organisations regarding the business of the partnership
- To prepare for and participate fully in partnership meetings
- To raise issues of concern to the sector
- To contribute to task or sub-groups
- To provide feed-back and information to stakeholder organisations
- To identify personal development needs in relation to representation
- To take advantage of support and training.

Practical Tips for Effectiveness in Meetings

Skills and Strategies for representatives of Partnerships

Operating effectively in meetings is an essential requirement for representatives.

Before meetings

- Be prepared!
- Make sure you read induction material and papers for meetings carefully
- Highlight any parts relevant to comments you want to make or questions you want to raise
- Make a note of the points you intend raising
- Don't forget to take your diary and business card or equivalent
- Contact another voluntary sector representative before your first meeting to introduce yourself
- When you are established, meet with or speak to or email other representatives outside the meeting about issues you want to raise
- If other people want to raise the same issue, agree who will table it or get it put on the agenda when and how, and who will offer support when the issue is discussed.

In meetings – getting to know the ropes

Get yourself known:

- Introduce yourself at the first meeting to the Chair and the partnership administrator/secretary
- Make sure the administrator has your correct contact details
- Ask the Chair to let you have two minutes to introduce yourself if s/he doesn't offer!

- Make sure other representatives know who you are and which organisation you come from and who you are representing. Give them some publicity material
- If others present are not asked to say who they are, suggest to the Chair that this happens.

Get to know others:

- Draw a diagram of who is sitting where with first names. The sooner you get to know who is who and where they are from, the better
- If you are not sure about the role and remit of the agencies represented, do some research outside the meeting
- Arrange to meet another representative after your first meeting(s) to chew over the experience or to raise queries not covered in the paperwork
- Start to identify possible allies in the meeting and contact them afterwards.

Get to know the business:

- If people refer to things by acronyms or by shorthand titles, don't be afraid to ask to what they refer
- If reports or policies are mentioned with which you are unfamiliar, do some individual research or if you think others are also unaware, ask for information to be provided by the partnership.

Get to know the etiquette:

- Observe the culture and etiquette of the meeting. Is it very formal? Do people defer to the Chair? Notice which items are formally agendaed and which can be raised as AOB (Any Other Business). If the etiquette is unfamiliar, watch and listen at the beginning
- If you want to raise an item under AOB, it is a good idea anyway to let the Chair know before the meeting starts
- When you want to speak, choose an appropriate moment and don't interrupt other people
- If you miss the chance to speak or it doesn't arise, raise it under AOB.

- Make your point as succinctly as possible. People may stop listening if you talk for too long or too often on an issue
- If you are unable to attend a meeting, make sure you apologise in advance and that this is minuted. It shows you take the meetings seriously
- Consider the benefit of nominating someone else to attend in your place (subject to sufficient briefing) especially if you might not always be able to attend.

Do your homework outside meetings

- Use other voluntary sector representatives to get support. If you experience the culture, attitudes and lack of understanding of statutory sector participants off-putting, identify with others what the problem is and think of practical ways to overcome this
- Keep up to date with the specialist or generalist voluntary sector agenda through your own parent organisation or through your local CVS. Remember, you are in the same community of interest as your statutory partners, but each sector has its own agenda and priorities
- Don't assume statutory partners know anything about the sector and how it works. Be prepared to educate by explaining.

Managing Role Conflicts

Managing Role Conflict in Representation

No system of representation is ideal. At times, you may find yourself in a state of uncertainty about the role and how to act. Role confusion and tension may arise and it is important to recognise the source and to have strategies for dealing with potential conflict.

You may find:

- You want to influence or 'lead' the views of the representees:

The scope of your role may permit you to 'lead' those you represent. Signal when you are doing this and speak as a 'pure' representative first and then clearly introduce your own professional views as your own.

- You want to speak in your own voice as yourself:

The scope of your role may permit you to give your own opinions. Signal when you are doing this and speak as a 'pure' representative first and then clearly introduce your own personal views as your own.

- You wear different 'hats' which can conflict:

Before you go into a meeting or activity, remind yourself which hat you are wearing. Leave the others behind. If you cannot avoid a conflict of interest, tell others in the meeting and ask advice on how to act. You may need to leave the room during a discussion in which you have an interest and in the worst case, you may need to resign from wearing one or more of your hats.

- You identify too closely with the views/interests of statutory partners:

Be careful not to be drawn into concealing information from representees which has been made known to you by statutory partners in your representative capacity. Carry out your

consultative duties carefully and follow the mandate given you be your representees.

- You do not agree with the views of other representatives on the group:

If your views are not accepted and you are outvoted, accept this with good grace. Report the decision as objectively as you can to your representees. If your disagreement with others in the group is sufficiently extreme and long-standing, resignation may be the only sensible option.

- You have to choose to represent a single view when there is no consensus among representees:

Do not feel that you have to present a united front if there isn't one. Be honest and reflect the diversity of opinion. You would not expect people from the business sector to always agree with each other. The voluntary sector is no less diverse.

- You have to contradict or implicitly criticise your funder in order to fulfil your representative role:

Sometimes you need to gently break eggs to make an omelette. Practice your choice of words in advance and make it clear that you are speaking on behalf of others. If possible form alliances on the partnership in advance of speaking out in public to ensure support. Sometimes it may be more politic to speak to officers in private outside meetings.

- You have to contradict the views of politicians in order to be representative:

Know your adversary. Cultivate communication and relationships with councillors however challenging. Pick your moment to disagree with them in public and choose your words carefully. Make it clear that what you say is based on more people's views than just your own.

Being Pro-active as a Representative

You may need to be pro-active on a range of fronts in order to improve as a representative and to manage the work-load involved. You need to ask for all or any of the following:

Within your own organisation

- your representation and consultation work to go in job descriptions
- your training needs to be identified and met
- your representative role to be scoped realistically and put in your work plan
- your organisation's representative work to be scoped, costed and sanctioned by the Board and included in your business plan
- a review / re-consideration of your representative work if it is too onerous.

In relation to other sector organisations

- to review and improve consultation mechanisms with stakeholder groups.

In relation to beneficiary client groups

- to seek to include beneficiaries in internal consultation.

In relation to your CVS

- training and support for representational role
- a generic representative role job description
- information on stakeholders outside the loop
- support to consult the wider voluntary and community sector.

In relation to the partnership Chair or Manager

If you were 'parachuted' into the representative role, you may need to ask for:

- a written remit of the partnership
- an accountability chart
- a contact list of all members and stakeholders
- access to past papers as necessary
- timely mailings

- dates for meetings, agenda items etc in advance
- a chance to input on agenda.

Skills for Chairs of Partnerships

Skills and Strategies for Chairs of Partnerships

The Chair of a cross-agency partnership has a crucial role to play in enabling and supporting voluntary sector representation.

Background knowledge

Chairs need some understanding of:

- the representative relationship and process
- the role of the CVS in representation and its support
- the responsibilities of the voluntary sector representative role
- the generalist versus the specialist role
- how representatives are selected and when
- who and how many they represent
- the scope of their role
- how consultation occurs with representees and the time-scales involved
- the barriers faced by voluntary sector representatives.

Induction of new representatives

Chairs are uniquely placed to ensure new representatives are inducted successfully into their role. Induction packs should be developed which include:

- The remit of the partnership, its strategic or operational purpose
- Partnership membership list - names, organisations, roles, full contact details with no unexplained acronyms
- Accountability diagram - where does the partnership fit in with groups below, at the same level and above
- Calendar of meeting dates and venues and forward plan of business
- How to get issues added to partnership agendas
- The style required for written reports
- Access to relevant past papers - past minutes, reviews, reports

- A role description for voluntary sector representative which explains what is expected including terms of reference
- Voluntary sector representee list with names, roles and full contact details
- How to claim allowable expenses for travel, administration, time
- Support opportunities for voluntary sector representatives
- Training and development opportunities for representatives.

Support in meetings

The environment created in meetings can be conducive or detrimental to voluntary sector participation. An effective Chair will:

- explain partnership business and planning
- introduce new members
- plan dates of meetings well-ahead
- consult members about timings of meetings
- ensure mailings are timely
- create opportunities for representatives to contribute to the agenda
- ensure meetings provide an equal focus on voluntary sector issues and contributions
- ensure that voluntary sector participants have an equal chance to speak
- request all partners provide plain English summaries as supplements to verbal reports
- provide explanation of background information
- avoid acronyms
- keep members on track, remind members of purpose and remit
- provide feedback on action generated by meetings.

Partnership development

Chairs need to address not just the needs of voluntary sector members but those of all participants. They should aim to develop their partnership in the same way that Chairs of Trustees review and develop their boards. Partnerships need to reflect on the way they internally operate, co-operate, challenge and motivate and the Chair should facilitate this process.

Voluntary sector representatives if they have experience of working on or with boards are well-placed to contribute. Business planning and review; skills audits, training analyses and targeted development opportunities should be regular, scheduled activities for partnerships.