

Working with Host organisations

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Timings and Questions

As there are so many attendees, it is not practical for verbal questions to be taken, therefore you will all remain 'muted' throughout

There will be time for questions at the end so please either wait until then to raise your hand or use the chat function.



Q & A

- Further relevant questions, not covered in the time allowed, will be answered and posted on the Contact website along with the recording of this Webinar, details of which will be circulated next week
- At the end of the Webinar a short questionnaire will launch, please take the time to complete this as this will assist with future online training events



Welcome!

Aims

- Why some forums use a host organisation
- Types of role a host organisation can fulfill
- Key things for forum steering groups to think about when thinking about working with a host organisation
- Key points for host organisations
- Benefits and pitfalls
- Developing a host agreement
- Recruiting a worker



Hosting

A company provides services to the forum to enable it to run

Need to establish a forum steering group, or committee of parent carers of children and young people with a range of SEND aged 0-25 living in, or receiving services from the local area

Forum requires support with some of its functions to be able to run



No existing forum

- » Previous forum has closed
- » Steering group numbers have dropped so unable to run
- » Changes in governmental boundaries (unitary council)
- » Contact may work with a local organisation in the area to build a new forum



Benefits to this approach

- » Local organisation will have an established presence in the area
- » Networks in place to reach parent carers
- » Links within the area which will be of benefit when forum establish e.g Local authority and health services
- » Established infrastructure required to support back-office functions
 - Managing grant
 - Advertising new forum
 - Skills to work with local parent carers
- » Examples – Healthwatch, disability charities
- » Clear guidance on this arrangement as part of the grant application



DFE grant and Hosting arrangements

In addition to the Conditions of Grant, a grant host without a parent carer forum in existence, will need to agree the following:

- » To use the DfE grant to establish a forum steering group, or committee of parent carers of children and young people with a range of SEND aged 0-25 living in, or receiving services from the local area
- » You will use principles and practices of community development and co-production to establish and empower the steering group to develop their own structure, governance, policies and plans towards becoming an independent group
- » All existing, and future, membership data or intellectual property rights relating to the forum will be assigned to the forum steering group including membership database, website, social media, email etc



Existing Forum

- » Small steering group/committee
- » Capacity – skills and time
- » Not having the infrastructure in place (bank account)
- » Infrastructure costs high and therefore challenge to cover with grant
- » Responsibility of managing the grant finance
- » Wanting to employ but no legal structure to do so
- » Clear guidance on this arrangement as part of the grant application
- » Can be provided by larger more established forums



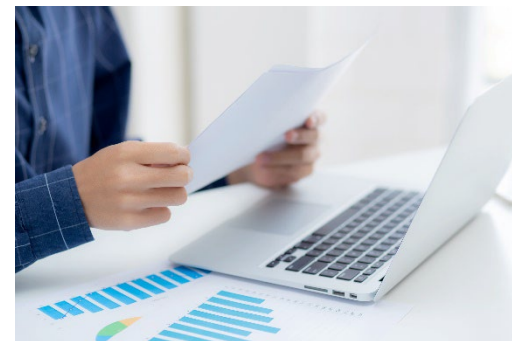
DFE grant and Hosting arrangements

- » In addition to the Conditions of Grant, a grant host hosting a newly established/established parent carer forum, will need to agree the following:
- » The forum steering group completes the grant application as the grant applicant. The host will complete the host section and agree to the conditions of grant.
- » The DfE grant is used as per the forum's directions to support the development of the steering group and work of the forum.
- » You have agreed support needs, and are clear and transparent about roles and responsibilities, costs of support services provided such as possible worker, recruitment, office base, and any fees for organisational overheads such as IT and HR support, management and managing disagreements. You will provide regular financial updates on grant spend to the forum.
- » You have agreed your role in relation to record keeping with the forum steering group.
- » There is an MOU in place between you and the forum that sets out all of the above



Types of role a host organisation can fulfill

- Managing the grant
 - Helping with application
 - Holding funding in bank account
 - Paying claims and invoices
 - Supporting the grant monitoring
 - Keeping records and managing proofs of expenditure
- Support with policies and developing governance
- Training – Induction process, parent carer representation, parent carer community
- Leadership support



Types of role a host organisation can fulfill

Infrastructure support

- Office space
- IT equipment and support
- Website
- Meeting rooms
- Insurance



Human Resources support

- Employ staff
- Contracts
- HMRC and Pensions requirements
- Running payroll
- Supervision



Types of role a host organisation can fulfill

Admin support

- Emails
- Agendas and minutes
- Booking meetings
- Preparing communications
- Writing reports

Comms and engagement support

- Websites
- social media
- Surveys
- Organising events
- Staffing events





THINGS
TO
CONSIDER



Things to consider - Steering groups

Reputation of the host organisation. How are they viewed by:

- parent carers
 - services providers
 - local authority
 - health services
 - funders
-
- Experience of working with similar organisations to a PCF
 - Your own relationship with the host. Are all the team comfortable working together (host and PCF).



Things to consider - Steering groups

- Security of the host
 - Length of time in existence
 - Turn over of staff
 - Financial status (Companies house/charities commission, annual reports)
 - Transparency of organisation
- Conflict of interest. If they are a local provider and PCF has to review the service, how will this work?
- Impact if the arrangement does not work
- Think about your expectations of the relationship



Things to consider – Host organisation

Reputation of the PCF. How are they viewed by:

- parent carers
 - services providers
 - local authority
 - health services
 - funders
-
- Your existing relationship with the PCF. Are all the team comfortable working together (host and PCF).



Things to consider – Host organisation

- Own organisation structure and capacity. Do you have time and energy to host a group?
- How are you going to manage any conflict of interest.
- Think about your expectations of the relationship
- Does your governance structure allow you to host?
- Do you have the skills within your team or are you going to need to recruit?
- Impact if the arrangement does not work



Things to consider – Both

How much is it going to cost? Example-Contact charge is 10% of grant

- What is the core offer?
- Are there different costs depending on work/skills
- Social media/Web development
- Admin
- Leadership development





Benefits to hosting

- » Enables you to utilise a partner's expertise in a given area
- » Mutual learning and a shared knowledge
- » Capitalize on each others size or prestige
- » Expand the reach of both PCF and host
- » Saving money on shared expenses
- » Supports legal compliance with some of the trickier areas
 - HR
 - Finance
 - Policy
 - GDPR



Benefits to hosting

- » Removes the back-office burden on the PCF
- » Adds capacity
- » Enables PCF to focus on participation
- » Adds a level of protection for steering group. Company becomes liable for funding/employment not just a single individual
- » Peace of mind
- » Provide a trusted advisor to bounce ideas off and help with any challenges



Pitfalls of hosting

- » Relationship challenges can involve a lot of time to resolve
- » Loss of control
- » Element of risk – neither organisation can predict the future
- » Damage to reputation if the arrangement does not work
- » Some financial risk if protocols not in place
- » Organisations become too comfortable with each other and line blur over time
- » No clear plan if the either party want to end the arrangement



How do you avoid pitfalls

1. Do your homework
2. Good governance
3. Take advice – Contact adviser
4. Consider a trial period
5. Have a back up plan
6. MOU



- » Having an MOU is a requirement of DFE grant conditions
- » Do not allow yourself to get lulled into view it's a tick box exercise because you all get on well
- » Things change. Staff turnover, members of PCF steering group and financial/political climate we are working in.
- » Mou helps to prepare.



Expect the best. Prepare for the worst. Capitalize on what comes.
- Zig Ziglar

Avoiding pitfalls – MOU & recruitment



MOU- Content

- » Background
- » Purpose and scope
 - » This Memorandum of Understanding (the “MoU”) between X PCF and XX host organisation defines and formalises the relationship between the parties; sets out their roles and responsibilities; and clarifies expectations of both parties.
 - » The MoU is not a contractual document and does not impose any legal obligation on any party. It sets out the principles for effective working relationships and mutual co-operation between the parties. The overall relationship described by the MoU is a voluntary arrangement. The MoU is independent of any other agreements signed by or between the organisations concerned.



MOU- Content

» Organisation

- information on both Host and PCF
- What they do
- AIMS and vision

» Objectives – what are you wanting to achieve

The arrangement is designed to provide short to medium term support to the volunteer Steering Group members of x pcf and to help capacity build the organisation to allow them to function as an independent organisation.

» Partnership values



MOU- Content

Roles and responsibilities

- » Clear about who is doing what
- » Decision making powers
- » Employment
- » Finance – outline expectations on timeliness, frequency of reports to steering group
- » IT support
- » Infrastructure support



MOU- Content

- » Duration of the MOU. Include any review schedule
- » Communication.
 - When
 - Who – identify lead at both organisations to act as point of contact
 - How
 - Timeliness
- » Confidentiality and data protection



MOU- Content

- » Ending the MOU. Include notice periods
- » How you will manage disagreements
- » Recording space for:
 - Variations in MOU
 - Dispute resolution record



» **Disclaimer**

- By signing this document or by participating in the MOU the partners are not committing to legally binding obligations. It is intended that the partners remain independent of each other and that their collaboration and use of the term 'partner' does not constitute the creation of a legal entity, nor authorise the entry into a commitment for or on behalf of each other.

- » Place for signing



Recruiting a worker

- » Benefit to being hosted for PCF's is the ability to employ via host
- » How you are funding (75% grant staffing) and how much?
- » Develop role description
- » Develop person specification
- » Ensure clarity on roles with host
 - Who is employing
 - Who is completing supervision
 - Who is setting work plan
 - Who is managing day to day





Working with Host organisations

- Lots of positives to being hosted
- Doing your homework and planning can help avoid pitfalls
- Always talk through with your adviser beforehand



Q & A



Thank You!

- Thank you for attending with us today
- A short questionnaire will launch at the end of this webinar
- Please take the time to complete this it will help us plan future online training events including other topics you would like to see
- The recording of this Webinar, presentation and questions will be on the parent participation Resources page of Contacts' website next week – an email confirming this will be sent to you once this is available

