

Meeting of Dialogue Forum with Voluntary Organisations

Monday 4 April, 14:30-16:30, Online

Note of Meeting

1. Introductory Update – Chair Peter Cassells

In his opening remarks, the Chair introduced new Forum members and briefly outlined the objectives of the meeting. The Chair highlighted the importance of the various work streams that are underway and noted the overlapping nature of the ongoing work. The Chair referred to the interdependent relationship that exists between the State and the voluntary sector and noted that a key focus of the meeting would be the topic of balancing accountability and autonomy.

2. Update on ongoing Forum work

Sub-Group on Partnership Principles

The Chair called on Dr. Damian Thomas to provide an update on the work of the Sub-Group on Partnership Principles. Key points raised included the following:

- The Sub-Group met on 25 February to discuss a draft paper outlining a draft set of principles to underpin the future relationship between the State and the voluntary sector. The meeting was highly productive, with members of the Sub-Group offering constructive inputs which are to be incorporated into the next draft of the paper.
- The Sub-Group will meet again on 13 May to agree a set of principles to present to the members of the Forum for consideration at the next Forum meeting in June. Dr. Thomas highlighted the importance of the principles and their role in underpinning other pieces of the Forum's work.

The Chair welcomed the update provided by Dr. Thomas and thanked the members of the Sub-Group for their significant contribution to the work of the Forum.

Case studies

The HSE provided an update on the case study process, and the points made included the following:

- A procurement process has taken place to arrange a contractor to facilitate the case study process. The contractor will also provide support to the HSE in relation to the review of the Service Arrangement.
- One submission was received in response to the tender and the evaluation group which was assembled to assess the tender was satisfied with the very strong proposal. The HSE is currently in the process of awarding the contract to the successful tenderer.
- Following the appointment of the contractor, an initial engagement will be had to discuss the progression and scope of the case study process.
- It is planned that the contractor will join the June Forum meeting to provide an update on the process and to outline timelines. The plan for the case studies will then be further developed, including with regard to the identification of case study candidates and Forum members will have an opportunity to be involved in this work. Outputs from the case studies will come back to the Forum for review in due course.

The Chair thanked the HSE for the update and agreed that it will be beneficial to receive an update at the June Forum meeting. The Chair highlighted the importance of the case studies in helping to get into the detail of issues which are arising. There followed a brief discussion and Forum members expressed satisfaction that a contractor would soon be in place and a desire to see the case study process get underway as soon as feasible.

SA Review

The HSE updated the members of the Forum on the progress made relating to the review of the Service Arrangement during which the following points were made:

- The National Operations Management Team is due to meet tomorrow and at that meeting it will discuss a draft “considerations” document which will underpin/inform the review of the Service Arrangement. The considerations document considers both the documentation aspect of the SA and the process of implementing the SA.
- The contractor appointed to facilitate the case study process will also provide support for the SA review process and the outputs from the case study process and the partnership principles will also influence the SA review. In keeping with the normal timeframes for reviews of the SA, the intention is that the new Service Arrangement will be implemented next January.

There followed a brief discussion during which the following points were made:

- Members of the Forum expressed some concern regarding the achievability of producing the review in time to enable a new SA to be in place from January next.
- Members also emphasised the importance of a robust consultation process with voluntary organisations as part of the review process. They also expressed a desire to provide an update to those they represent and there was a desire for clarity in the voluntary sector regarding progress, timelines and what can be expected.

The Chair thanked the HSE for their update and reflected on the strong commitment to the completion of the Service Arrangement review as outlined in the National Service Plan. The Chair acknowledged the drift in timelines and encouraged the HSE to ensure the review is completed to meet existing deadlines.

3. Panel Discussion: Perspectives on balancing accountability and autonomy

The Chair welcomed the two presenters joining the meeting to offer perspectives on balancing accountability and autonomy.

Katie Burke, Centre for Effective Services

Katie Burke delivered a presentation on the impacts of trusted relationships and the taking of an outcomes-based focus on the balancing of accountability and autonomy. Key points included:

- Using an outcomes-based approach to navigate a funder-provider relationship allows for greater flexibility regarding the activities and inputs used to deliver those outcomes. Outcomes should be informed by national ambitions and frameworks and by local needs and gaps.
- Regular meetings between both parties can influence discussions regarding changes to budgets and services and indeed the agreed outcomes can adjust over time.

- Building and retaining capacity for innovation can enable a better balance between accountability and autonomy in the relationship between the statutory and voluntary sector.
- The importance of building trusting relationships cannot be overstated and such relationships can lead to better outcomes for citizens.
- The provision of multi-annual funding has positive effects on the development of trusted relationships between service deliverers and commissioners – it acknowledges that results take time.

Carina Connellan, Irish Aid, Department of Foreign Affairs

Carina Connellan focused on the Government's international development programme and their partnership with civil society organisations. Key points included:

- Many of the places Irish Aid partners operate are high-risk settings and so it is helpful to define levels of risk appetite. Benefits are to be found in building capacity around risk management and in ensuring partners have strong risk management systems. Annual meetings include discussion of risk management and external reviews are used also.
- Having clear principles and shared values aid in developing better relationships between the commissioner and service providers. A MoU sets out specific benchmarks around governance and capacity both regarding the DFA's role and the NGO's role.
- Multi-annual funding is used in Irish Aid - there is agreement to provide a proportion of the overall budget to keep funding stable.
- Practicing critical self-reflection and listening to your partners also aid this process – both sides need to come together with open minds if the relationship is to be improved. The importance of mutual respect and tone should not be understated.
- Both funder and provider must recognise that they do not exist for their own sake – they exist to deliver on shared goals. Interdependencies in the relationship between the State and voluntary sector should be recognised and each party should be aware that their mutual goals could not be achieved without either side.

The Chair thanked the presenters and there followed a discussion during which the following points were made:

- Trust is hard to earn and easy to undermine and should be viewed less as a precondition but as a result. Rather than focusing solely on trust between funder and provider, consideration should also be given to trust between service users and professionals at the front line; between the front line and management; and between management and the funder. It was also recognised that it can be difficult to build trusting, quality relationships when a funder is working with hundreds of partner organisations.
- Shared, agreed outcomes can provide an important shared purpose and can help providers develop and articulate an evidence-informed rationale for their service. Outcomes can be deliberately broad to allow providers space to target their services at local needs.
- Capturing learning can be a useful approach rather than aiming at formal evaluation. A lot has been done in the health service on outcomes including the nurture programme and clinical programmes. Outcomes should not be confused with KPIs.
- There was agreement that the Irish Aid example provides a useful example of the use of a type of multi-annual funding and of organisational capacity development being provided for in funding allocation.
- Levels of risk tolerance can vary widely in the same organisation. A level of risk tolerance must be built into an organisation's operational processes.

4. Close

The Chair concluded the meeting, thanking members and presenters for their contributions. The Chair remarked that significant progress has been made to date and noted that the presentations delivered today will provide valuable inputs to the deliberations of the Forum.

The Chair reminded members that the next Planning Group will take place on 23 May and the next Forum meeting will take place on 13 June.