

Building on SUCCESS: next steps for The Wheel



5 year strategic
plan 2007-2012

Building a strong vibrant
community & voluntary
sector in Ireland

The Wheel was established in 2000 with a strong commitment to make Ireland a better place to live in by strengthening organisations in the community and voluntary sector.

We work to create an environment in which the sector and organisations within it can flourish through representing shared interests and by supporting organisations in their work.


As a leading advocate for the community and voluntary sector we have put in place innovative processes to make this possible, strengthening thousands of organisations.

Our Vision is of a vibrant and dynamic community and voluntary sector, as united as it is diverse, operating at the centre of Irish life and decision making as a necessary part of a healthy democracy.

The community and voluntary sector in Ireland is large, growing and dynamic comprising over 19,000 organisations, employing over 45,000 people, benefiting from the voluntary contribution of over 50,000 people and with an estimated annual turnover of €2.5bn. More than half of the organisations in existence in 2007 have been formed since 1988, a dynamic which has created a sector comprised of thousands of small, young organisations.

The sector is now a significant player in Irish social and economic life. It is extremely diverse - from small local 'social groups' like retirement associations to large national umbrellas for organisations involved in providing services in the areas of disability, poverty, and homelessness. In the middle is a vast array of small, medium and large groups.

**over 19,000 organisations,
employing 45,000+ people,
benefiting from the voluntary**



The Wheel is open to all. Our members are organisations and dedicated individuals who seek to support others and to benefit Irish society.

Important achievements in The Wheel's first six years include:

- A strong and growing membership base representing the diversity of the sector.
- Innovative approaches to helping member organisations and the people who work in them to develop.
- A valued information, networking and training programme.
- Additional funding and resources secured for the sector e.g. The sector skills suite of programmes and funding.
- Securing designated social partner status.
- Building public awareness and educating other sectors of the value of the community and voluntary sector.
- Championing issues relating to the community and voluntary sector through the various forums in which we are represented.
- Acting as a catalyst for new thinking - helping the sector to see its potential.
- Engaging government and increasing supports to strengthen the sector.
- Increasing the level of trust in the sector, by providing space for coming together.

This is the record of success on which we must now build.

**contribution of 50,000+ people
and with an estimated annual
turnover of €2.5bn**

About this plan

This 5-year strategy builds on a wide ranging consultation and sets out our ambitions for the future, what we think we can achieve and how we as the leading organisation dedicated to advancing the sector can best achieve that. Our plan is based on:

- The challenges facing the sector and the changes most likely to occur over the next decade;
- Our role and what The Wheel can contribute;
- Our priorities over the next period and the approaches we will take.

We invited all our members to contribute their views and consulted with a large sample of member organisations, representing different sectors and sizes. We also spoke with key stakeholders - academics, non-members, policy makers. Specifically this plan addresses the following strategic questions:

- **What are the common priorities for the development of the community and voluntary sector?**
- **How do we provide value to our members, and should we differentiate our offering by size or sector?**
- **How can The Wheel meet a diverse range of needs?**
- **What difference can we make working on our own and in partnership?**
- **How can we further develop our unique contribution to strengthening community and voluntary organisations and the sector?**
- **What should be our priorities for the future?**
- **How can we secure our future, in an environment where our funding is insecure?**

Vision, mission and values

> Our vision...

is of an Ireland with a vibrant and dynamic community and voluntary sector, as united as it is diverse, operating at the centre of Irish life and decision making as a necessary part of a healthy democracy.

> Our mission...

The Wheel is an organisation dedicated to strengthening the community and voluntary sector, focusing on organisations who seek to create a better world. We advocate for an environment that supports voluntary activity, and work to help this flourish by supporting organisations and by representing their shared interests.

> Our goals...

- 1 Improve the legal, political and operational environment for the community and voluntary sector.
- 2 Strengthen the capacity of organisations to get things done.
- 3 Build public support for the sector.
- 4 Strengthen The Wheel's own ability to deliver.

> Our programmes...

We achieve these goals through the following core programme areas:

- **Advocacy Programme:** we advocate on cross-sector issues, enabling the diverse interests in the sector to negotiate with key stakeholders on issues of common interest.
- **Networking Programme:** we facilitate the building of networks of people with common interests, and create opportunities for networking across traditional boundaries. We also maintain an up-to-date directory of organisations within the sector.
- **Training and Development Programme:** we make training available to organisations and individuals in the sector and promote the highest standards of operational excellence.
- **Information Services Programme:** we provide information tailored to needs.

Our values...

- Facilitative not directive.
- Valuing volunteering and the vital role it plays in a healthy vibrant community.
- Diversity as a strength.
- Evidence-based and solutions-focused case-making.
- Authoritative and reliable advocacy.
- Transparent in our decision-making.
- Problem-solving in our work.
- Professional in our relationships (internal and external).
- Proactive in identifying and addressing unmet needs.
- Collaboration-seeking in our approach.

Programmes

- Advocacy
- Networking
- Training
- Information

improve the legal, political and operational environment for the CV sector

Strengthen the capacity of organisations within the sector to get things done

Vision

An Ireland with a vibrant and dynamic community and voluntary sector that is as united as it is diverse, operating at the centre of Irish life and decision-making as a necessary part of a healthy democracy.

Mission

The Wheel is an organisation dedicated to strengthening the community and voluntary sector, focusing on organisations who seek to create a better world. We advocate for an environment that supports voluntary activity, and work to help this flourish by supporting organisations and by representing their shared interests.

Build public support for the sector

Strengthen The Wheel's own ability to deliver

Values

- Facilitative not directive
- Valuing volunteering
- Diversity as a strength
- Evidence-based and solutions focused
- Authoritative and reliable
- Transparent
- Problem solving
- Professional
- Proactive
- Collaborative

Dynamics of change

The Wheel is operating in a rapidly changing world. Our plans for the future take account of those changes and address their implications for the community and voluntary sector and for our future role.

Professionalism

Profound changes have been taking place in how organisations are managed. An increasing number of organisations in the sector are being managed by a professional management team, with backgrounds in the public, private and not-for-profit sectors. This trend is driven by a number of key factors and is likely to intensify. Many organisations have themselves grown to be large multi-million euro organisations, often blurring the distinctions between 'voluntary' and 'commercial'. Also, funding sources are becoming increasingly competitive and demanding.

The challenge for The Wheel is - how to support a diverse sector wherein larger organisations may have training, information, IT, marketing, quality management systems and other supports that smaller groups cannot access.

Legislation

We are likely to finally see the passing of comprehensive charities legislation which will establish a Charities Regulator for the sector. This new entity will have an impact on all community or voluntary organisations which choose to seek a 'CHY' number or conduct fundraising. In addition, all organisations are burdened with the increasing complexity of legislative and regulatory requirements in employment, health and safety and other areas. The impact of these various forms of legislation will particularly affect the community and voluntary sector - especially smaller groups.

The challenge for The Wheel is - to ensure that the new charities legislation has an enabling effect on the work of the whole sector and to help its members stay ahead of these changes by championing good practice so that any negative impact is minimised.



Government policy

The next five years until 2012 will see the implementation of the next National Development Plan, the Social Partnership National Agreement 'Towards 2016' and the conclusion of the Implementation and Advisory (IAG) process for the White Paper, Supporting Voluntary Activity. In addition, we will also see the outcomes from the Taskforce on Active Citizenship, new initiatives to support volunteering and the establishment of the Charity Regulator. All these initiatives channel government policy towards the sector and will have some impact on all organisations within it.

Government is the largest funder of the sector, either because it out-sources many services to be delivered by the sector (especially in health care, education and social services), or because it is committed to supporting many organisations with a strong social purpose. Public sector reform is likely to lead to heavy accountability burdens for funding recipients.

There will also continue to be changes in government structures at national, regional and local level - challenging organisations to be alert and well informed.

*The challenge for The Wheel is -
to help the sector respond to these developments - advocating
for change where necessary, but also ensuring that organisations
can cope with them.*



**Public sector reform is likely to lead
to heavy accountability burdens
for funding recipients.**



Fundraising

With more disposable income but less time to volunteer, people are increasingly targeted by slick, professional fundraising techniques, putting greater pressure on many not-for-profits to become more professional and innovative. Also, as Corporate Social Responsibility programmes increase, companies are becoming more strategic and targeted in their efforts, seeking long-term partnerships and more meaningful involvement for them and their staff.

The sector is responding to the challenge of self-regulation of fundraising as set out in the Charities Bill, and the implementation and monitoring of the codes of practice will place additional burdens on organisations.

*The challenge for The Wheel is -
to ensure the codes of practice are appropriate and to build members' capacity in fundraising while increasing public support for the sector.*

Volunteering

Despite claims of falling numbers of volunteers, there is evidence that people will volunteer if there is an opportunity for direct and meaningful involvement.

More complex governance means that Boards or management committees will need a greater range of skills, e.g. finance, legal. As all members of the Board/management committee for community and voluntary organisations are volunteers, there will be increased competition amongst groups to attract people to serve in this capacity. The increasing accountability required from members of a Board of Directors will also act as a deterrent to participation.

There are challenges too for organisations seeking to engage volunteers. Volunteers, in whatever capacity they work, expect a high quality rewarding experience, to feel valued, and to be given sufficient training and induction.

*The challenge for The Wheel is -
to help counteract any downward trend in volunteering and to help members to attract and retain volunteers.*

Social and life style changes

Important societal changes include:

- **Population shifts** - Large new urban areas are being created across the country, bringing people from Dublin and far away with no connections to the area and no means of getting involved with local community and voluntary groups, which potentially could be a useful way of putting down roots.
- **New Irish** - Thousands of people from Eastern Europe and beyond are coming to live and work in Ireland - again with no roots and many often becoming clients of our member organisations, who face challenges in developing the cultural and linguistic skills to support them.
- **Advocacy and lobbying** - This is a core role for The Wheel, but its increasingly competitive nature requires increased professionalism and an approach based on trust, hard evidence and effective solutions.

These changes in the sector are profound and have significant implications for the role of The Wheel. It is clear that:

- **We can't address all the needs. To be effective we have to have a clear focus and agreed priorities.**
- **We face a challenge in agreeing those priorities in such a large, rapidly changing and diverse sector.**
- **We will need to work in partnership with others, to engage those with the resources and competencies to help address some of the gaps.**

The challenge for The Wheel is - to anticipate these changes and adapt to them promptly.



GOAL 1: Improve the legal, political and operational environment for the sector.




Why do we want to do this?

As a result of the adoption of the Towards 2016 national agreement, and the advancement of the long-awaited Charity Bill, the community and voluntary sector is facing an period of unprecedented change. With respect to sector-development issues it needs to present a compelling, prioritised agenda aimed at strengthening the contribution of the sector to Irish society.

How will we approach this task?


We intend to:

- a) **Focus** our advocacy and lobbying on 6 priority policy areas:
 1. charities regulation: its introduction and roll-out;
 2. relationship between the sector and the state;
 3. funding systems, mechanisms and levels for sector;
 4. development of sector infrastructure;
 5. ensuring a supportive general legislative and operational environment; and,
 6. advancement of skills-building supports and standards.
 - b) **Strengthen** The Wheel's influence with key policy-makers and decision-makers by providing vigorously researched, evidence-based and solutions-focused cases for policy reform.
 - c) **Learn** from other sectors, countries and perspectives.
 - d) **Involve** our members and other stakeholders through innovative and effective two-way processes to identify urgent, relevant issues and how to address them.
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What actions will we take?

- Develop and implement appropriate advocacy campaigns for each priority.
- Develop and manage processes and structures for policy development ensuring appropriate communication with members and others through the use of networks and working groups.
- Establish partnerships and/or alliances with other bodies that will create synergies and a stronger voice for the sector.
- Seek places on key policy and decision-making forums, nationally and internationally.
- Seek to influence representatives of all political parties.
- Develop robust relationships with Charity Regulator and other key stakeholders.
- Identify research gaps related to current and emerging policy positions and secure funding to cover cost of research to further develop evidence-based, solutions-focused cases.
- Spearhead a programme of 'thought leadership initiatives' in relation to the future of the sector.



GOAL 2: Strengthen the capacity of organisations within the sector to get things done.



Why do we want to do this?

The majority of organisations in the sector are small/medium sized. They tend not to have the resources to invest in their own training, leadership development and good governance or to keep up-to-date with the plethora of new regulations. The Wheel has a vital role to play in ensuring the provision of such supports and bring its unique emphasis on networking as the basis for its learning programmes.

How will we approach this task?


We intend to:

- a) **Strengthen** leadership, governance and day-to-day management in organisations to improve the effectiveness of their outcomes.
- b) **Help** organisations adopt good practices by promoting awareness of tailored tools, techniques and procedures.
- c) **Foster** an environment in which trust is built and organisations and their leaders have the opportunity to reflect, learn and develop their thinking and practice






What actions will we take?

- Develop programmes to assist organisations in the following identified areas: governance, management, fundraising, regulation.
- Provide information and advice to members and the sector through regular communications.
- Develop a quality mark for organisations in the sector and promote models of best practice for and across the sector.
- Continue to develop relationships with networks, umbrella groups and other sector and statutory infrastructure bodies.
- Further develop The Wheel's family of websites into a central resource.
- Develop the **Stronger Leaders** tailor-made leadership programme into a mainstreamed programme and explore accreditation.
- Mainstream and grow the **Training Links** programme as a dedicated subsidy for network-based training in the sector.
- Provide a Charities Regulation support service.
- Ensure the sector has access to advice and consultancy services on the following topics:
 - Evaluation of outcomes
 - Fundraising
 - Starting up a charity
 - Event organisation
 - Managing professional contractors
 - Organisational development
 - Human resource issues.
- Explore the provision of services such as research, database management, funding sources.



GOAL 3: Build public support for the sector.



Why do we want to do this?

Societies with high levels of social participation experience less crime, less violence, less depression. But while there is general support among the public for community and voluntary organisations, when people step up and involve themselves in a community or voluntary group or charitable enterprise they often end up on committees rather than experiencing direct contact through actual activities.

The challenge is to ensure greater understanding and appreciation of the multi-faceted needs of the non-profit sector - it's not just about fundraising!


How will we approach this task?

We intend to:

- a) **Facilitate** quality debate about the role of the community and voluntary sector in bringing about a healthy, democratic society.
- b) **Promote** the importance of the sector and its distinct contribution to Irish society, building the case for philanthropy and for investment in social capital.
- c) **Promote** the benefits of, and the opportunities for, volunteering and being an active citizen.

What actions will we take?

- Develop the Annual Conference into a recognised forum for international and national representatives to get together, network, exchange ideas, experiences and build strategies for a just world.
- Develop and implement a campaign to increase understanding and promote public awareness of the purpose and significance of the community and voluntary sector within Irish Society.
- Host an exhibition to showcase the sector for the public, bringing together voluntary organisations, government agencies and companies who work with and alongside the sector.
- Support and develop programmes to enhance understanding of philanthropy and investment in the sector.
- Build links with media and hold regular media briefings.



GOAL 4: Strengthen The Wheel's own ability to deliver.

Why do we want to do this?

To deliver on this plan The Wheel will need to invest in developing its own capacity. By operating to the highest standards of effectiveness and efficiency The Wheel will achieve its aim of playing a leadership role for the sector by 'acclaim' and not 'claim'.

While there are more than 24,000 not-for-profit organisations in Ireland, we have chosen to target those actively involved in improving some aspect of life in Ireland. We are not seeking to involve all those organisations, but we do seek to attract those interested in making a contribution to strengthening the sector or who feel they will benefit from interaction with others.

How will we approach this task?

We intend to:

- a) **Broaden** and increase membership of The Wheel across the differing categories of organisation size and type.
- b) **Build** greater awareness of The Wheel's role and contribution in the sector and what it can do for its members.
- c) **Seek** more secure funding for ourselves from government, philanthropic organisations and other sources with the strong support of our member organisations.
- d) **Strengthen** our people, systems and administrative supports to enable us to implement this plan.

What actions will we take?

- Structure The Wheel around a core team for core operations. Identify areas of flexibility and a portfolio of projects for additional work when funding becomes available.
- Ensure that the skills available to The Wheel office include:
 - Research
 - Finance
 - Event Management
 - Organisational development
 - Community and voluntary sector organisational expertise
 - Influencing and advocacy
 - Database management
 - Website management
 - Oral and written communications
 - Training
 - Grant making.

- Continue to develop processes to involve members in the development of the organisation.
- Reach out to non-members via regular communications.
- Identify, grow and develop a mix of income streams: members' fees; service charges; core funding from the state; project funding from philanthropic, corporate and statutory sources.
- Strengthen the Board of The Wheel to reflect leadership appropriate to its mission and the sector's diversity. Create meaningful linkages to other sectors.
- Ensure operating procedures and policies are models of 'best practice' and regularly review costs to ensure efficiency.
- Secure the 'Investor in People' (or similar) award for The Wheel within 5 years.

Finances and Funding

The Wheel is a company limited by guarantee and submits audited accounts to the Companies Office annually. We will continue to publish an annual report in which all activities and finances are clearly communicated to members and the general public.

The following diagram outlines the targeted sources and percentage of income which The Wheel will seek to secure to implement this plan. This represents funding for The Wheel's core operations. Additional projects will be taken on and managed as funding becomes available.

Implementation

The implementation of this plan will be overseen ultimately by the Board of Directors. The Chief Executive Officer and management in The Wheel will prepare annual operations plans and budgets for Board approval in each of the five years of the plan's duration. The Board of Directors has four sub-committees that will play an active part, with staff, in monitoring progress:

- Staff & Employment
- Policy
- Finance & Fundraising
- Membership & Services.

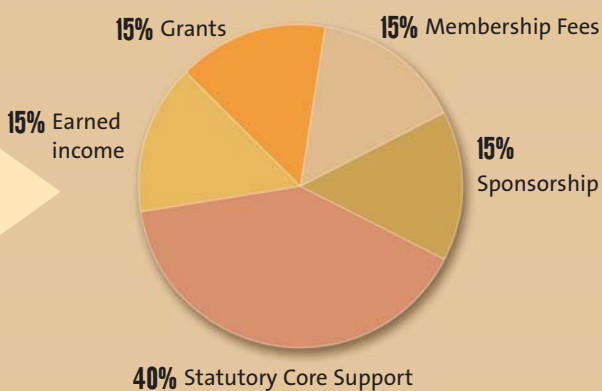
All staff members have annual goal-driven work programmes designed to achieve the annual operations plans - a series of milestones towards implementation of this 5-year plan.

Evaluation

We place great emphasis on monitoring and evaluating our activities. We also believe that the best way to ensure success is to ensure that members and participants have input into the design and ongoing development of programmes and the monitoring of progress. These principles, along with our values, guide how we will implement this plan.

An external evaluation of The Wheel and its services will be conducted after the first three years of the plan. This will be compared to the external evaluation which was carried out prior to developing this plan. Annual reviews of progress against goals in the annual operations plan will be conducted and presented to the Board. Participants at all events and courses are asked to complete evaluations, and all feedback will be collated and reviewed. Equally, members and participants will be made aware of The Wheel's Complaints Policy which welcomes feedback from all users of our services. All additional special projects will have their own evaluation mechanism.

The Wheel's target income sources for Core Operations





The Wheel

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