

Strategic Plan
2017–2020

STRONGER CHARITIES STRONGER COMMUNITIES

ACT

CHAMPION

EMPOWER

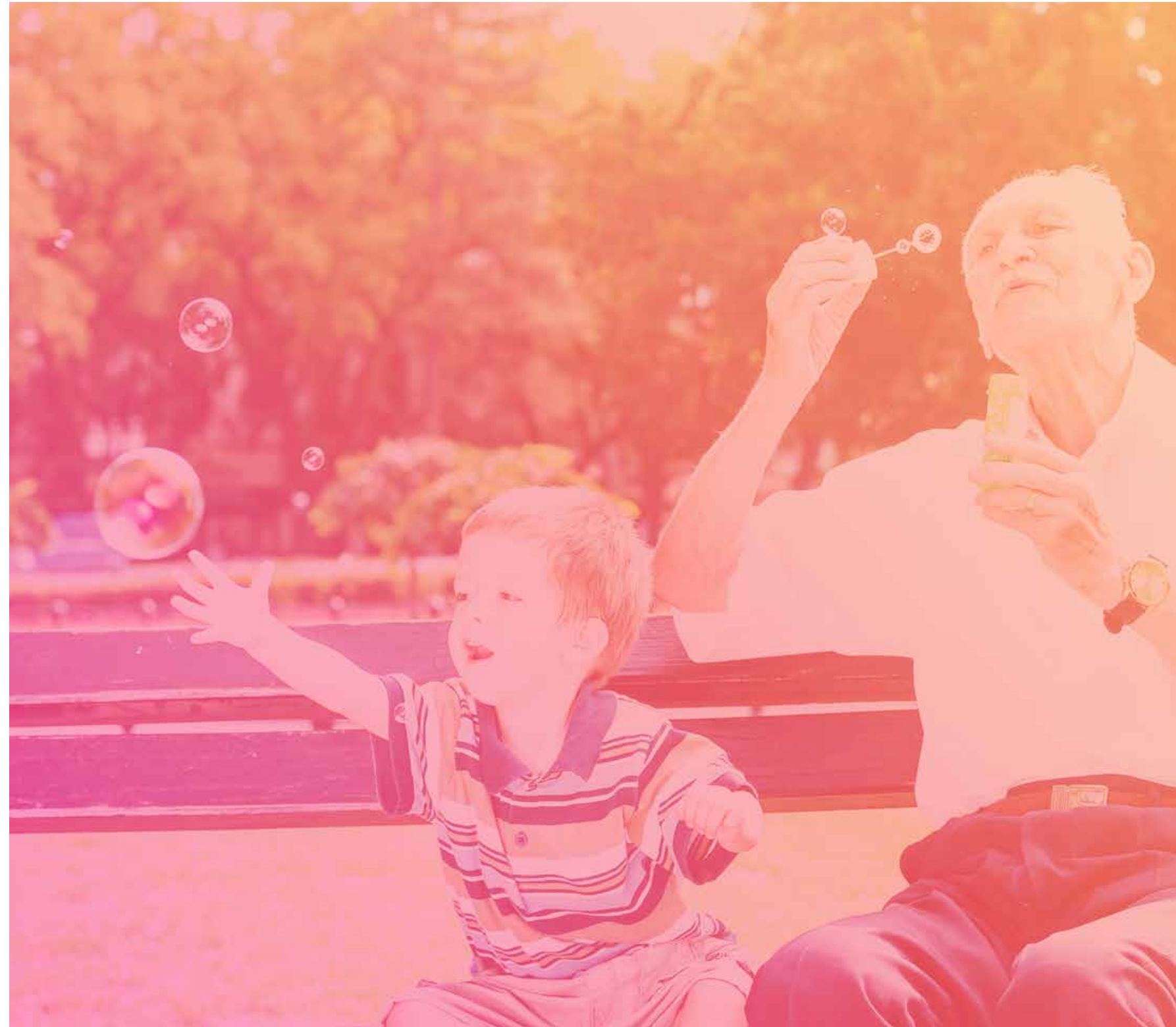
INCLUDE

INFLUENCE

INSPIRE

CONNECT

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Our Vision

**A THRIVING
COMMUNITY
& VOLUNTARY
SECTOR AT THE
HEART OF A FAIR
& JUST IRELAND**

A UNIQUE ORGANISATION WITH A UNIQUE PURPOSE

The Wheel is Ireland's national association of community, voluntary and charitable organisations. We are unique in our role as a "one-stop shop" for anything related to the charity sector. Through the size and diversity of our membership, we reach the invisible infrastructure of Irish society.

Our Mission

We will strengthen the community and voluntary sector's capacity and capability to play its part in achieving a fair and just society in Ireland by:

- Representing the shared interests of community and voluntary organisations
- Supporting these organisations to do their work
- Promoting the importance of active citizenship

We passionately believe that people, through their participation in community, voluntary and charity organisations, play a central role in improving and enriching life in Ireland. So our simple and ambitious mission is to help make Ireland a more fair and just place for all by strengthening the capacity and capability of these organisations.

Our reputation has grown as a leadership and representative voice for the sector. We are also a bustling hub for practical advice and support. We represent the sector's shared interests to Government, to other decision-makers and to the media. We promote a better understanding by the public of Irish charities and community organisations and their impacts. We work to ensure that the sector is recognised and respected, adequately resourced and proportionally regulated.

We build networks of interest, share learnings, provide information and deliver essential training on a host of relevant topics. We also offer many other unique services and supports, including Fundingpoint (our funding and grants database), ResourcePoint (group discounts for members), and tailored training.

We are enthusiastically committed to transparency, accountability and high standards of practice and governance for ourselves, our members and the sector.

OUR VALUES

Our core belief is that people, through their active participation in the work of community and voluntary organisations, play a critical and effective role in improving and enriching life in Ireland. We believe that a strong, vibrant, independent and autonomous community and voluntary sector is critically important for sustaining a fair and just society and a healthy democracy. We believe that the societal value created by the community and voluntary sector is a unique, precious and transformative contribution that benefits all of society. We believe that a healthy democracy results from a vigorous and positive interplay between representative and participative democratic processes and structures.

These core beliefs are consistent with our vision of *"a thriving community and voluntary sector at the heart of a fair and just Ireland"* and these beliefs have shaped our values:

1 We value our **membership** for their work in creating a fair and just Ireland.

2 We value **transparency, accountability** and **high standards** of practice and governance within our membership and the sector because it increases the impact of our work.

3 We value the diversity of the community and voluntary sector and believe it is a **strength**.

4 We value the community and voluntary approach because it puts **people and communities first** and is driven by the pursuit of the common good.

5 We value **regulation** that enhances public trust and is sensitive to the needs of the community, voluntary and charity sector.

6 We value **collaborative** working as a way of increasing the value and impact of our work and of strengthening our sector.

7 We value **citizens' active participation** in society so they can influence the decisions that affect them.

8 We value people's **freedom** to organise, to be heard and to be respected.

9 We value the interdependence of people's lives and the sense of **solidarity** that comes from people acting together.

10 We value a society where there is harmony and **balance with nature**.



THE COMMUNITY, VOLUNTARY & CHARITY SECTOR

Nations thrive when they have healthy civil societies. It's what makes Ireland so much more than just an economy. It's what binds otherwise isolated people and interests and entities into a vibrant human system for common good.

A vibrant community, voluntary and charity sector is at the heart of a healthy society. It powers the delicate, interdependent ecosystem that both creates - and protects - the common good.

That's why The Wheel is proud to represent - and be the voice of - the community, voluntary and charity sector. And that's why we're passionate and determined to do an exemplary and effective job. Supporting wonderful people and organisations who work so hard and single-mindedly to ensure that equality, fairness, opportunity and participation are the DNA markers of what it means to be Irish.

This sector is the heart and conscience of a nation. It's the driver of positive values and transformative actions. It accelerates social progress and puts the breaks on excesses of greed and individualism. It rebalances the tensions between the influential and the marginalised; the insiders and the outsiders, the powerful and the weak.

Volunteers are Ireland's silent army: millions of people engaging 365 days a year with community, voluntary and charitable organisations. More than 560,000 people in Ireland - at least one in ten people - volunteer their time in upwards of 11,500 charitable community and voluntary organisations. But the sector is a very under-recognised and under-estimated pillar of Irish life.

- Nonprofit organisations employ at least 149,360 people in Ireland and they have a combined annual turnover of over €10 billion.
- Over 560,000 people volunteer every year, and 50,000 people help run charities as voluntary trustees.
- Over €750 million is fundraised every year to support this work.

It's The Wheel's job to support - and when needed and appropriate, to lead - these wonderful forces for common good. This plan defines and drives this crucial work.

A MOMENT IN TIME LIKE NEVER BEFORE

Ireland and the world have changed since the publication of our last plan in 2012. We are in an era of uncertainty but also a moment of real opportunity. There has been significant turbulence and change at a global level. A more self-centred, nationalistic, simplistic narrative has found voice, audience and agency. In Ireland, the result of the 2016 General Election produced a shift indicating disillusionment with the old ways of organising society and distributing resources.

For our sector, there are positives in this - strong signals that people want change. The outcome of marriage equality referendum means that Irish people understand and gravitate towards the benefits of equality and caring for others like never before. This phenomenon has been strengthening against a backdrop of increasing inequality and poverty in Ireland and the resultant increased demands for the services provided by many organisations in the sector.

However, following the crash, funding cuts have led to a dramatic downsizing of the community and voluntary sector. This means that services and programmes have been reduced or suspended or cut entirely. Taken together, these factors - less funding, fewer organisations, more demands for services -

create great pressures for everyone working in the sector and present serious challenges for organisations.

Problems sometimes create huge opportunity. Organisations have a chance to really inspire by communicating a compelling vision for progressive change; by individually developing smart plans and strategies and by together, sharing, supporting and acting.

However, non funding-related challenges exist. A series of controversies in the sector has eroded public trust in the sector. It's a chance for an era-changing generation of organisations to transform Ireland through dynamic programmes, and with openness, ambition, bravery and passion.

Our members understand that The Wheel is playing a key role at the centre of this generational shift. This strategic plan underpins this responsibility and guides our actions until 2020.

OUR IMPACT

2012-2016

+49%

1 Our **membership** grew by 49% from 860 at the end of 2011 to 1,284 at the end of 2016.



2 Average **attendance** at our training events & workshops grew by almost 30%, from 2,240 people at 97 events in 2011 to 3,381 people at 148 events in 2016.



3 We have succeeded in diversifying our funding base so that our reliance on core-statutory-funding grants has been lessened.



4 We have significantly raised our profile in the media and other public fora providing leadership, crucial insights and balance in the often poorly-informed reporting on charities.



5 We have produced new helpful resources, publications and training courses to provide clear and simple guidance on the new regulatory, governance and reporting requirements.



6 We have helped our members prepare for other potential changes such as the shift towards the commissioning of human, social and community services.

×2

7 Public engagement with our Better Together campaign as measured by public votes almost doubled from 97,000 votes in 2011 to 186,000 in 2016.

+36%

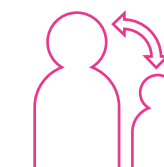
8 The number of unique visits to wheel.ie increased by 36% from 215,000 in 2011 to 292,000 in 2016. By the end of 2016, our Twitter account had 8,627 followers, our Facebook page had 4,510 likes and our LinkedIn profile has 1588 followers.



9 We achieved full voluntary compliance with the Governance Code for Community, Voluntary and Charitable Organisations; the Statement of Recommended Practice (SORP) for financial and activity reporting; and the Principles of Good Practice in Fundraising.



10 We restructured and re-energised our Board and Board subgroups.



11 We have restructured our human resources to meet increased demands while still providing all the key services and benefits to our members.

FOUR THEMES THAT UNDERPIN THIS PLAN

1

Representing

We will build on our strong track record as a coherent, uniting voice, for organisations of all sizes. We will work to ensure that the impacts of community, voluntary and charitable organisations are properly understood and appreciated by stakeholders and decision-makers; that the legal, policy and operational environment is supportive of community and voluntary activity; and that the sector is appropriately represented in decision-making settings.

2

Supporting

We will vigorously support community, voluntary and charitable organisations to be as effective as possible in their work to deliver positive, high-quality change for the people and communities they serve. We will emphasise the importance of promoting and supporting strong leadership, good practice, transparency and accountability in organisations and in showing the public the real impact of their work.

3

Promoting Active Citizenship

We will engage in conversations about building the kind of society we want to live in and about the role our sector plays in achieving this. We will articulate clearly the link between a fair and just society and the role of community and voluntary organisations. We will encourage and create opportunities for people to play their part as active citizens through the community, voluntary and charitable activities.

4

Being a Vibrant Membership Organisation

We will ensure that The Wheel is well-run, healthy, relevant, responsive and effective. We will ensure our members' voice is strong in shaping how we do our work to achieve our strategic objectives and in implementing this landmark plan.

STRATEGIC OBJECTIVES & KEY ACTIONS

These carefully developed objectives and actions are about powering our community, voluntary and charity sector to have maximum positive impacts on communities and on Ireland. These objectives and actions reflect four central drivers of our work - representing the sector with excellence; supporting members and the sector in facing their key challenges; promoting active citizenship and ensuring that The Wheel itself is dynamic, secure, effective and well-governed. Over the course of this plan, all these actions will be carefully evaluated, measured and adjusted if necessary against a robust evidence-based measurement plan. You can find our targets and benchmarks in the full version of this plan.

Objective

1

POSITIVELY INFLUENCE PUBLIC
OPINION & WIN POLICY CHANGE
TO STRENGTHEN TRUST &
SUPPORT FOR OUR SECTOR

Why this is important

Our mission tasks us to support the sector to thrive and fulfill a trusted role at the heart of a fair and just Ireland. The changes we seek to public policy will be driven to achieve the ‘three Rs’ - sensitive and proportionate *Regulation*; sufficient *Resources*; and, appropriate *Recognition* and understanding.

Key Actions

Ensuring our sector is recognised and respected

- ACTION 1
- Publish our vision for, and stimulate thinking about, the crucial role of the community, voluntary and charity sector.
- ACTION 2
- Publish and disseminate regular research promoting the nature, scale and significance of the sector.
- ACTION 3
- Implement an engagement strategy for influencers, decision makers and media.
- ACTION 4
- Collaborate with other significant players in the sector to amplify the effectiveness of the sector’s voice.

Ensuring our sector is widely trusted by the public

- ACTION 5
- Conduct a programme of regular engagement with key media contacts, to increase understanding of charities and the extraordinary value of their work.
- ACTION 6
- Provide a comprehensive, thoughtful and swift ‘fact-check and context-check service’ in relation to national and local media misunderstanding of charities.
- ACTION 7
- In partnership, drive an integrated campaign targeted at repairing and strengthening public trust in the sector.

Ensuring our sector is resourced effectively

- ACTION 8
- Influence the policy on commissioning and other statutory and funding practices across Government as recommended in Commissioning for Communities report (Jan 2016).
- ACTION 9
- Work for a policy and funding environment that is more supportive of the practice of grant-making as well as of private giving and philanthropy.
- ACTION 10
- Build awareness with funders of the nature of the funding required for our members to thrive, e.g. full cost funding, multi-year funding agreements.

Ensuring regulation of our sector is credible, proportionate and supportive

- ACTION 11
- Proactively engage with all relevant regulatory authorities to ensure they carry out their functions in a coherent and sensitive manner.
- ACTION 12
- Ensure that the impact of multiple and reporting requirements on charities is understood and streamlined to bring coherence.

Ensuring there is a Government strategy for the community, voluntary and charity sector

- ACTION 15
- Work to build cross-party consensus for a Government strategy for the sector that is underpinned by a commitment to the principles of societal value. Secure commitment on a timeline for the production of such a strategy with an implementation plan and allocation of resources.

Other supporting actions

- ACTION 16
- Mobilise our membership to help secure public and political support for these initiatives.
- ACTION 17
- Engage with members to maintain a regularly refreshed policy platform with key messages.
- ACTION 18
- Work with UK, European and other international partners and coalitions to support the sector’s public-opinion and public-policy priorities in Ireland.

Impacts

On foot of these actions we believe knowledge about the sector will increase among policy-makers and the media. Public trust levels in charities will rise from the low of 43% measured in November 2016. There will be increased access to reliable information on the sector’s work and impacts. Organisations will be credibly, proportionately and supportively regulated and monitored. Community, voluntary and charity organisations will be better supported and resourced increasing their strategic planning, advocacy and effectiveness.

Objective

2

FOSTER EXCELLENT LEADERSHIP WITHIN THE SECTOR

Why this is important

Transformation requires leadership. Members tell us that existing leaders in organisations need support, and a new generation of leaders must be recruited, inspired and developed. For this to happen, the appropriate opportunities, supports, and resources must be available. We commit to facilitating and driving this crucial work.



Key Actions

ACTION 19

We will review, develop and enhance our ‘Leadership Academy’ to ensure good leadership and governance within the sector is recognised, nourished and supported.

For volunteer trustee leaders

ACTION 20

Build members’ commitment to developing their leadership at board/trustee level through their continuous development and training.

ACTION 21

Provide governance training, and other supports to volunteer trustee leaders to both drive and support their effective leadership.

ACTION 22

Promote, support and celebrate good governance in the sector.

For senior executive leaders

ACTION 23

Review and enhance our accredited and unaccredited leadership programme offerings to enhance relevance and usefulness to senior managers and CEOs.

ACTION 24

Offer our executive leadership programmes to an increased number of members.

ACTION 25

Support the development of senior management and CEO forums regionally.

Other measures

ACTION 26

We will explore availability of other potential supports, resources and programmes for good leadership practice e.g. mentoring, secondments to/from private sector, specialist modules for management, student programmes, continuous professional development and scholarship programmes.

Impacts

Existing leaders will be better supported and a new generation of leaders will be inspired, recruited, and developed. Leaders - both staff and trustees - will be better equipped to lead their organisations effectively. Community, voluntary and charity organisations will be visibly committed to openness, transparency and accountability. It will be the norm to have a published strategic plan.

Objective
3

DRIVE THE CONTINUOUS
IMPROVEMENT OF
ORGANISATIONAL PRACTICE
WITHIN THE SECTOR

Why this is important

The community, voluntary and charity sector powers - and protects - the common good. That means there must be consistent and persistent embedding of high standards within organisations to deliver better impacts. We will continue to provide practical training, advice and information and we will promote and support the development and adoption of quality standards and transparency across the sector.



Key Actions

Provide a national, comprehensive and affordable training and support service

ACTION 27
Review the fit of our courses with the needs of our members, regulatory and funder requirements and adapt as appropriate.

ACTION 28
Focus our programmes to support charities with key challenges like: regulatory compliance and transparency; HR; personal and organisational resilience; financial, strategic and environmental sustainability; dealing with statutory funding models; and increasing the requirement for ‘impact reporting’.

ACTION 29
Provide quality, user-friendly, tool-kit information to support the improvement of organisational performance and the wellbeing of staff and volunteers.

Support member organisations to develop and implement staff training and organisational development plans

ACTION 30
Develop and promote usage of an organisational ‘health check’ tool for our members to assess their own developmental needs.

ACTION 31
Promote peer-learning and peer-collaborations across the sector.

Impacts

There will be a continuous improvement and implementation of high standards in organisations’ everyday practice. People will benefit from increases in levels of skills, ability, information and knowledge having engaged with our capacity-building and training programmes. Over the long-term, organisations will demonstrate good governance, transparency, regulatory compliance, effective responses to commissioning, progress in diversifying their income sources, and effective responses to demands for ‘outcomes-based planning’.

Objective

4

DEMONSTRATE THE CRUCIAL
VALUE OF PARTICIPATION
IN COMMUNITY AND CIVIC LIFE
& IN PUBLIC DECISION-MAKING

Why this is important

The community, voluntary and charity sector can only power the common good through the active participation of people. This involvement is a unique, precious and transformative contribution that benefits all of society. We believe that a healthy democracy results from a vigorous and positive interplay between representative and participative democracy.

Key Actions

Support active citizenship by promoting the range and quality of opportunities and resources to help people get more involved in civic life.

ACTION 32
Support initiatives to promote active citizenship including interacting with policy-makers and public administration, voting registration and more.

ACTION 33
Collaboratively publish research on the positive benefits of actively participating in civic life and public decision-making.

ACTION 34
Implement initiatives to advance the conclusions of the Citizens Rising report (2015).

ACTION 35
Work with Volunteer Ireland to advocate for a National Volunteering Strategy.

ACTION 36
Support common-cause organisations and coalitions who advocate for a fair and just society.

ACTION 37
Conduct advocacy to ensure that the State encourages and enables active citizenship.

Collaborate with others to celebrate and promote the benefits of active citizenship.

ACTION 38
Assess the effectiveness and potential of Better Together as a model to demonstrate the benefits of active citizenship through showcasing the work of The Wheel’s members.

Support the awareness and understanding of the universal Global Goals amongst The Wheel’s membership to strengthen their role in influencing Ireland’s responsibilities as a signatory.

ACTION 39
Ensure, through our membership of the Coalition 2030, that in Ireland’s reporting on its implementation of the Global Goals / Sustainable Development Goals, the contribution of our members and of the community and voluntary sector is recognised.

ACTION 40
Participate in a formal process of consultation with civil society about Ireland’s responsibilities under these Global Goals.

ACTION 41
Inform and update our members about the Global Goals/SDGs and how they relate to their work.

ACTION 42
Demonstrate the benefits of all of our members pooling information, ideas and learnings so as to ‘green the sector’ in terms of how we all do our work.



Impacts

There will be more information and guidance for people to get involved in civic participation and volunteering. There will be greater recognition among policy-makers and funders of the benefits of active citizenship, and a more enabling policy environment to support active citizenship and volunteering. Ireland’s responsibilities under the Sustainable Development Goals will inform the work of our members.

Objective **5** **BUILD A STRONG,
DIVERSE, ENGAGED
& CONNECTED
MEMBERSHIP**

Why this is important

Our combined members form the largest community of charities in Ireland. This gives moral and numerical strength to our mandate and influence. Under this objective we will ensure that we become ever more relevant to our member’s needs. We will create enhanced relationships with our diverse membership and in every county in the Republic of Ireland.



Key Actions

- ACTION 43**
Deliver a comprehensive membership engagement strategy that encourages mobilisation around public policy work.
- ACTION 44**
Conduct annual member surveys to ensure The Wheel is providing relevant supports and services and track member satisfaction.
- ACTION 45**
Increase our regional presence and activities to support members.
- ACTION 46**
Establish networks of interest and peer-to-peer engagement opportunities for members.
- ACTION 47**
Publish regular content for and about the work of our members and the wider sector to keep members informed about best thinking nationally and internationally.
- ACTION 48**
Devise new ways to promote the positive impacts our members make.
- ACTION 49**
Provide member-only services and resources.

Impacts

We will be more relevant and responsive to our members’ needs. We will have a more influential collective voice. There will be collegiate collaboration and sharing across member organisations. We will have an engaged membership, further strengthened by connections to international networks of voluntary organisations.



Objective 6

ENSURE THAT THE WHEEL HAS THE STRUCTURE, CAPACITY & RESOURCES TO DELIVER THIS PLAN

Why this is important

In order for us to deliver the optimum change for Irish community, voluntary and charitable organisations. we need to find an effective way of translating our ambition into tangible and measurable impacts. We will do this and meet the ambitious targets set for 2020 in an efficient and effective fashion.

Key Actions

Ensure that The Wheel is a well-run, transparent and publicly accountable organisation, modelling good organisational practice.

ACTION 50
Maintain full compliance with the three good practice standards for charities: the Governance Code, the Statement of Good Practice in Fundraising and the Statement of Recommended Practice (SORP) for finance and activity reporting.

ACTION 51
Ensure up-to-date organisational information is easily found in the ‘Transparency’ section of our website.

ACTION 52
Share our operational and governance policies, procedures and learnings openly with members to stimulate learning and sharing of resources across the sector.

ACTION 53
Review and enhance our ‘Membership/Board Accountability Policy’ to ensure that the organisation remains rooted in our members.

Ensure The Wheel continues to be a great place to work and participate.

ACTION 54
Develop and implement a best practice HR strategy for The Wheel for the period to 2020.

ACTION 55
Ensure that every staff member has a written and regularly reviewed set of goals and objectives hardwired to the organisation’s mission and strategy.

ACTION 56
Review the Board membership and experience/ skills base to anticipate strategic needs 2017-2020 and beyond.

ACTION 57
Develop and implement a ‘training and development’ plan for staff and board.

ACTION 58
Seek adoption of a recognised standard in quality by 2020 [e.g. ‘Investors in People’ award].

Ensure our strategy to 2020 is implemented, monitored and reviewed

ACTION 59
Develop, implement and monitor critical implementation plans which underpin the strategy.

ACTION 60
Produce annual operations plan and budgets that underpin the plan.

ACTION 61
Develop and implement a framework and indicators for monitoring and assessing the effectiveness of this plan.



Impacts

On foot of these actions we will build greater financial diversity, effectiveness and independence. We will continue to develop as a best-practice, learning organisation attracting quality staff and board members. The Wheel will be more influential and recognised as a key national advocate for the CVC sector. Our members, and we ourselves, will have greater understanding of how to do our work in a sustainable way.

HOW WE WILL KNOW IF WE ARE SUCCESSFUL?

It is a challenge to monitor, measure and describe the benefits our sector delivers for the common good. It is a difficult duty for our member organisations and it is a difficult challenge for The Wheel.

To overcome this challenge we employ a best practice, evidence-based approach to demonstrating what we do, why it's necessary, and how it makes such a difference to people's lives in Ireland. This is important for The Wheel because it will help us do our job better and use our resources effectively.

At its very core, our work involves generating information, creating knowledge and modelling and testing ways of using these resources to best effect. So, our approach in this new strategic plan demonstrates how we can track and assess our own organisational impact by looking at it through the following three lenses:

Contributing to knowledge

This impact is important because access to good quality, reliable information, insight, understanding and knowledge about our sector is essential if people are to appreciate and acknowledge how our sector works, what it needs and how it can best contribute to society.

Changing thinking

Being successful means changing thinking and attitudes within and

about our sector. Among members and other bodies, thinking needs to change so that organisations - including The Wheel - are able to build the capacity to adapt and respond to societal, demographic, policy and regulatory changes in our environment.

Changing practice

Changing and improving practice will assist individuals, groups, communities and organisations - including Government Departments, public bodies and other significant funding stakeholders - to perform more effectively in working to achieve a fair and just Ireland.

We cannot achieve these impacts on our own. The successful implantation of this plan relies on collaboration with other organisations. To this end, we will be inviting potential collaborators who share our objectives to engage with us so that we can build collaborative work programmes into our annual operational plans.

A comprehensive listing of indicators and impacts is contained in our long form plan available at www.wheel.ie

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IN COMMON CAUSE WITH OUR MEMBERS

Ireland is, without doubt, at an intersection of uncertainty and opportunity. In gravity-shifting times like these when the future vision of our collective social contract is being contested, it is often people and civil society – individuals, communities, civil society organisations, volunteers and charities – who shift the balance back towards equality, inclusion and opportunity.

It is all the more critical therefore that community, voluntary and charity organisations show enlightened and skilled leadership and that our strategies and programmes of work are finely tuned, brave and innovative. That we are resourced, geared-up, fit and lithe. That our structures and practices are proud and transparent. That there are many

fires of enlightenment brightening the hillside. And that there's one strong beacon on the summit. This is the critical role The Wheel and its members play. With this strategic plan, in common cause with our allies, we are moving to the next level of members and impact and effectiveness in enriching life for everyone in Ireland.

We would like to thank the following organisations whose staff and work are depicted in the enclosed photographs: The Irish Wheelchair Association, Irish Therapy Dogs, Volunteer Ireland, Amnesty International and Merchants Quay Ireland.





Stronger Charities.
Stronger Communities.

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