



Collaborations: UK Case Study Handout

Case Study: Lancashire – Merseyside Model

1. Joint Chief Executive Deployment

- CFL specific.
- CFM specific.
- CFL/CFM (Outward looking)

Recognising that the two units are at very different stages in their development the CEO's time will be drawn towards CFL in the short to medium term. The goal should be 20% on the two specifics and 60% on joint activities in the longer term.

Internal Examples: Joint Board Training & Development, Joint Finance Sub-Committee, Management of One Staff Team, One Staff Handbook and Set of Policies

External Examples: Projects delivered with one approach across both areas, such as MP and Council CEO engagement and Policy development

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2. Staff Optimisation/ Deployment

% of structure in place.

- CFL deployment (hrs/fee).
- CFM deployment (hrs/fee).
- CFL/CFM joint deployment (hrs/fee).

Here we need to measure that the back office is effective (doing the right things) and efficient (doing the right things well)

Examples:

- One Senior Management Team & One Operations Management Team
- Joint Grants and Finance & Admin Teams
- One set of Management Accounts
- Exploring use of one Investment Manager
- Use of one DIGITS Database, SAGE Accounting System & Payroll

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3. Donor Activity (Base Level and Growth)

- CFL specific (value £).
- CFM specific (value £).
- Cross linkage (value £). CFL triggering CFM/vice versa

These are not easy to measure but what is important is that both units are ideally growing but as a minimum not losing business and benefiting from crossover donor direct or indirect activity.

Examples:

- Donors creating funds for both areas, eg. CFM donors extending into CFL
- Joint bids for European programmes
- Joint presentations & approaches to professional advisors
- Joint launches of products, such as 100 product & Women's Philanthropy
- Sharing of CFM expertise to launch CFL Development activities in 2009/10

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4. Grants Activity (Base Level and Growth)

- CFL specific (value £)
- CFM specific (value £)
- Cross linkage (value £) CFL triggering CFM / vice versa

These are again not easy to measure, but we need to demonstrate that the level of grant making is growing, not shrinking, and benefiting from crossover activities.

Examples:

- One Grants Team servicing panels across the areas
- Joint Grants Advisory Group to develop strategy
- One approach to use of each area's local needs analysis to ensure donor education and strategic impact of grants
- One grant application, monitoring and impact assessment approach



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