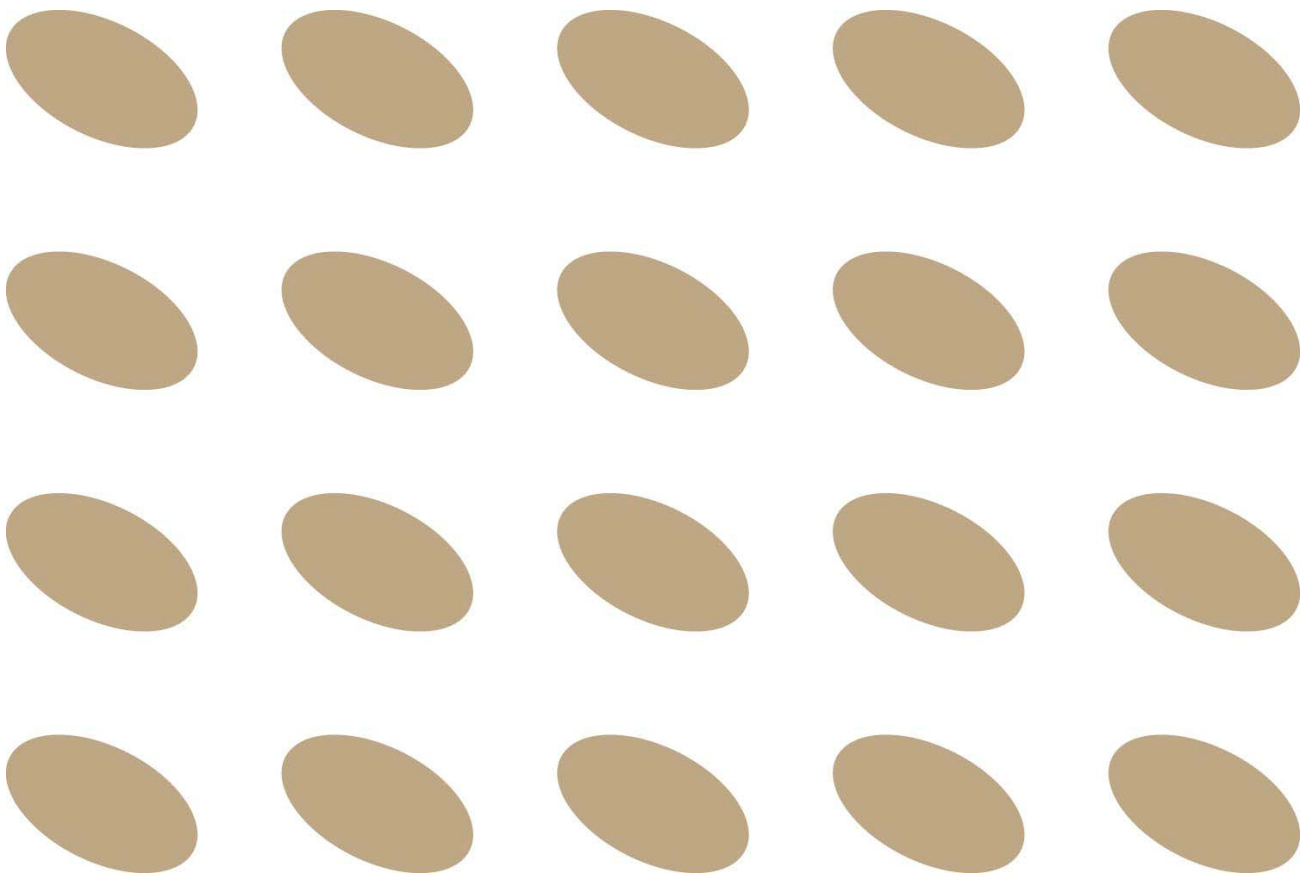




# Co-operatives and Mutuals

- *What do they mean for your service?*

22 March 2012, London – Holiday Inn  
Oxford Circus



# Co-ops and Mutuals

## Introduction

APSE training, in conjunction with Walker Morris Solicitors and De Montfort University, is pleased to announce further dates for our new Master Class on understanding what co-operatives and mutuals mean for your service.

Ministers are keen to promote mutuals as the way forward for the public sector, before your authority takes this leap of faith you need to consider the evidence, research and impact evaluation to date.

The Masterclass will provide guidance to managers considering a mutual or co-operative, getting beyond the policy debate to provide a practical and pragmatic approach to this option.

The sessions will cover:

- The policy agenda driving the move towards co-operatives and mutuals
- What we mean by co-operatives and mutuals
- An evaluation of the current evidence base on co-operatives and mutuals
- Key success factors
- Likely impacts and outcomes
- Workforce matters
- Key legal issues to consider

**All delegates attending will receive a free copy of the research document “Proof of delivery?” published by APSE and De Montfort University**

## Who will benefit?

Those who are considering the option of a co-operative or mutual and wish to understand the implications of pursuing this approach for their service/local authority

## What's included?

Course fees include delegates' documentation and course material including case studies, suggested practices and appropriate toolkits and templates, lunch and refreshments. Please note that the fee does not include hotel accommodation.

## Trainers

The sessions will be delivered by Andrew Uprichard from Walker Morris solicitors, Steve Griggs from De Montfort University, Adele Reynolds from De Montfort University/APSE supported by Jan Kennedy from APSE.

## **Andrew Uprichard –Walker Morris**

Andrew is a partner at Walker Morris in the Public Sector and Project Team, he joined Walker Morris in October 2004 from Irwin Mitchell where he was head of the Public Sector Team from 1998 and has specialised in public sector work since 1990.

He has advised extensively on setting up innovative corporate structures for public and private partnerships, both for local authorities and the trusts/companies established for the purposes of carrying out transferred services. Andrew has also advised on service delivery options across a wide range of local authority activities, including airports, education, residential care, cultural facilities and leisure services.

Andrew has both spoken about and advised on a wide range of Social Enterprise Models including charitable companies and staff mutuals in relation to various services delivered by local authorities.

As well as advising local authorities and other public bodies, Andrew also has a considerable degree of experience of issues from within a public sector organisation. He was a member of High Peak Borough Council from 1991 to 2003 and was its Deputy Leader from 1995 to 2002.

## **Adele Reynolds – De Montfort University/APSE**

Adele is a KTP Research Associate working on a research partnership between the APSE and De Montfort University. The Knowledge Transfer Partnership is researching and analysing local government's response to reduced public spending producing practical tools that enable local authorities to respond strategically to the pressures of reduced public spending.

Before joining the KTP Adele worked in local government, firstly for Harrogate Council as a project officer in direct services and most recently for Chorley Council as a research officer.

Adele is the primary author of the APSE report; *'Proof of delivery? A review of the role of co-operatives and mutuals in local public service provision'*

## **Steve Griggs – De Montfort University**

Steve is a Reader in Local Governance in the Local Governance Research Unit at De Montfort University at Leicester (UK).

Steve is acting as lead academic on the Knowledge Transfer partnership (KTP) that APSE currently have in place with De Montfort University. Steve is co-author of the

APSE report; *'Proof of delivery? A review of the role of co-operatives and mutuals in local public service provision'*. He has worked with APSE in the past on a range of publications including, *'Towards a future for public employment'* and *'The Ensuring Council: Governance, Neighborhoods and Service Delivery'*

Steven has a wide experience of engaging with policy-makers and practitioners, notably in the form of critical action learning interventions designed to bring about policy and organisational change. He was a founding faculty member for the Leaders UK Collaborative Leadership programme at the National School of Government (UK). He has led and contributed to the senior management development programmes across local authorities, the police and fire service.

## **Jan Kennedy - APSE**

Jan Kennedy is the Principal Trainer for APSE and has responsibility for APSE training. Jan has a background in training and development, firstly as an executive training officer in central government where she gained her CIPD in Training & Development.

She moved to local government in 1999 where she joined Liverpool City Council as a member of the corporate training team. Jan has experience of managing and delivering a wide range of training and development including Liverpool's One Stop Shop training programme.

Prior to joining APSE Jan managed the Lifelong Learning Employability curriculum in Adult and Community Education. Jan holds a Certificate in Post 16 Education and a CLAIT Advanced in ICT.

Jan is also qualified in level A and level B psychometric testing.

Since joining APSE Jan regularly delivers training on a range of topics including Project Management, Marketing, Supervisory skills and leadership, and Service Level Agreements. Jan also co-delivers on the current Master Classes on Health and Safety.

## **Duration**

1 day event: Start time: **9.30 am** Finish time: **4.30 pm**

## **Continuing professional development (CPD) points accreditation**

Delegates who attend the course will be able to earn CPD Points towards their certification areas.

## Programme outline

09.15 - 09.30	Registration and refreshments
09.30 – 09.45	Domestics and Course Objectives
09.45 – 10.00	<b>Introduction – the policy context</b> <ul style="list-style-type: none"> <li>• Coalition policy</li> <li>• What is driving the push towards co-ops and mutuals?</li> <li>• Localism Act / Open public services white paper</li> <li>• Key questions – effectiveness of service delivery and democratic accountability</li> <li>• Service divestment or contracts?</li> </ul>
10.00 – 11.00	<b>Legal and Procurement issues</b> <ul style="list-style-type: none"> <li>• Community Right to Challenge – Employee rights and rejection criteria</li> <li>• Procurement issues</li> <li>• Structures and governance</li> </ul>
11.00 – 11.30	Morning coffee/tea break
11.30 – 12.00	<b>Legal and procurement issues cont.</b> <ul style="list-style-type: none"> <li>• Funding and resource considerations</li> <li>• Treatment of assets</li> <li>• Retaining mutual status</li> </ul>
12.00 – 12.30	<b>Workforce matters</b> <b>Legal and employment matters</b> <ul style="list-style-type: none"> <li>• TUPE and employment rights</li> <li>• Pension admission arrangements</li> <li>• Redundancy issues</li> </ul>
12.30 - 13.30	Lunch
13.30 – 14.00	<b>Proof of Delivery’ – applying the evidence to your service area</b> <ul style="list-style-type: none"> <li>• Reviewing the evidence base</li> <li>• Key success factors <ul style="list-style-type: none"> <li>✓ Contract lock in</li> <li>✓ Buy in</li> <li>✓ Ongoing support, advocacy and expert advice</li> </ul> </li> <li>• Lessons for elected members and service managers</li> </ul>
14.00 – 14.30	<b>Case studies</b> Examples of successes and failures in setting up Co-Operatives and mutuals
14.45 - 15.00	Afternoon tea/coffee
15.15 – 16.15	<b>Appraising the options – Are Co-Ops and mutuals viable?</b> <ul style="list-style-type: none"> <li>• What factors need to be in place to produce a positive impact for your service, staff/local community and local democracy?</li> <li>• Using an appraisal methodology</li> <li>• Carrying out an options appraisal in your authority</li> </ul>
16.15 – 16.30	Final questions and Close Delegate Evaluation and Certificates

# Co-operatives and mutuals - booking form 2012

Contact name: \_\_\_\_\_ Employer: \_\_\_\_\_

For official use: Del No: ..... Date: ..... Database: Y / N Confirmation: Y / N
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Address: \_\_\_\_\_

Postcode: \_\_\_\_\_ Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

Delegate name	Job title	Email address

Please state if delegates have any special requirements (dietary/access/information in alternate formats):

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**Booking information: APSE will take bookings up to 24 hrs prior to the course, subject to availability. You are however advised to book early to secure your place and avoid disappointment.**

**Please note:** places on the sessions will be strictly limited to a first come first served basis. Provisional reservations for places are not accepted on this form.

**APSE members:**      1 delegate:                    £219 + VAT per course  
                                 3 or more delegates      £189+ VAT per delegate per course (*Discount only applies to delegates attending same date.*)

**Non members:**      per delegate                    £384 + VAT per course

**Please quote your purchase order number (if appropriate):**

**Booking confirmation:** APSE issues a written confirmation letter to the 'contact name' for all delegate bookings received. We will not send confirmation to each delegate named on the booking form, unless this has been requested in writing. Should the 'contact name' not receive a confirmation letter by post within 10 working days of sending the booking form, then please contact APSE on telephone: 0161 772 1810.

**Cancellation charges:** Reservation is a contract. Substitution of delegates is acceptable any time in writing by post, email to [jclough@apse.org.uk](mailto:jclough@apse.org.uk) or fax to 0161 772 1811. Cancellations must be made in writing at least 10 working days before the event and will incur a £75 administration fee. No refunds can be given for cancellations received less than 10 working days before the event or for non-attendance. Booking transfers will only be acceptable, if there is availability on another date for the same course, and will incur a £75 administration fee. In the unlikely event of cancellation by the organisers, liability will be restricted to the refund of fees paid. APSE regrets we cannot accept any liability for associated transport or hotel costs in the event of course cancellations made by us.

The organisers reserve the right to make changes to the programme, speakers or venue should this become necessary.

**Please return completed form to:**

APSE – 2<sup>nd</sup> Floor Washbrook House, Lancastrian Office Centre, Talbot Road, Old Trafford, Manchester, M32 0FP.  
Tel 0161 772 1810 – Fax 0161 772 1811 - Email: [jclough@apse.org.uk](mailto:jclough@apse.org.uk) Web: [www.apse.org.uk](http://www.apse.org.uk)

