

Report on Management Support Grant (2021) from The Triangle Trust 1949 Fund

Prepared by Joanne Madders, Head of Development

Background

Cranfield Trust is a registered charity and the UK’s leading provider of pro bono management support for non-profit organisations working in support of human welfare. We are delighted to be working with The Triangle Trust 1949 Fund to support your grant holders with their organisation development and leadership challenges and we would like to thank the Trustees of The Triangle Trust 1949 Fund for partnering with us and supporting the effectiveness and sustainability of your grant holder charities.

In late 2020, The Triangle Trust 1949 Fund made a 2-year grant award to Cranfield Trust. In Year 1, this was primarily to provide management support to organisations being supported with Covid-19 emergency funding round. In Year 2, this is being utilised to provide development support through Peer to Peer Exchange and Mentoring/Consultancy assignments for Young Carer and Young Offender support organisations that had been awarded strategic funding.

Summary of progress: In the 2021 programme, 13 organisations were referred to us for support, which has progressed to 8 projects with 7 organisations.

No. charities referred by The Triangle Trust 1949 Fund – Year 1	13
No. organisations eligible for support (Hopelinks Ltd. was ineligible)	12
No. project enquiries generated by referrals	16
No. enquiries proceeding to projects	8
<ul style="list-style-type: none"> No. completed projects at March 2022: Lagan’s Foundation, On the Out CIC (2), Family Tree Wirral 	4
<ul style="list-style-type: none"> Consultancy projects ongoing at March 2022: Inside Out Support Wales, More Than Grandparents, Lifted Carers Centre, Kinship Care Midlothian SCIO. 	4

Highlights from Year 1 Programme to date

Key impacts to date from the first year of funding follow below. More details about next steps for the organisations and projects and their [Journey to Excellence](#) (J2E) assessments are included on pages 5-8.

Inside Out Support Wales (IOSW) – We are close to completing our **business development** project with IOSW. We assigned a volunteer, who is an expert organisational development and training professional, to support this social enterprise to formulate a business development plan that will underpin operational development and fundraising efforts. Jamie Grundy, Co-Director, reports that the Business Development project has been really successful: **“Thank you again for your help thus far, as it has been a significant help to us as a small and developing team.”** In addition to producing the new plan, during the project, IOSW successfully applied for a grant from the National Lottery and our volunteer has used his own network to garner an important platform for IOSW to speak about their work. **See case study on pages 8-9.**

Lagan’s Foundation - CEO Carren Bell has recently completed a **strategy review** with the support of our volunteer consultant, a chartered Programme Manager. The charity has gained a better strategic plan and learning from the project, which will enable them to support more children and families in future. Full evaluation to follow but Carren was very satisfied with the project: **“The Cranfield Trust provided expert**

support to help us to shape our strategy and develop our underlying structure, so that we could grow and meet increasing demand - thank you."

On The Out CIC – On the Out CEO Helen Brown has completed a **business planning** project and we assigned an experienced volunteer with a strong background in charity business planning and fundraising. In her project feedback, Helen has expressed that she is very satisfied with the support they received. Helen explained that the support provided by her Cranfield Trust volunteer has been a huge benefit and the charity is now seeing extra work coming in with the resulting recognition of their services. Helen also cited that their learning from the project was excellent. **"The Cranfield Trust provided expert support to help us to shape our strategy and develop our underlying structure, so that we could grow and meet increasing demand - thank you!"** The project has delivered a better strategic plan and increased understanding in the organisation around setting a clear direction and goals. Helen commented on the impact that the project will have on the charity's beneficiaries: **"A better strategic plan will enable us to have a sounder infrastructure and more concrete goals - leading to more people being helped."**

On the Out CIC - Mentoring: In April 2021, Helen had also requested a separate Mentoring assignment to support her personally in her role as CEO. We had assigned one of our experienced mentors who is a senior executive leader within the health and social sectors. Helen and her mentor met but Helen has reported that while she valued her mentor's input, she wasn't able to take advantage of the support available due to constraints on her time. This was largely due to an important new contract for the charity, which was a positive development for the charity but unexpected in terms of the additional time restrictions that it imposed on Helen. We decided with Helen and her mentor to close this assignment early.

Family Tree Wirral (FTW) – Tony Lawrence at FTW requested a **Governance** review and we paired him with an experienced volunteer consultant. Our volunteer worked with the charity to understand their challenges and produced a report highlighting the scale of the issues and challenges, highlighting 5 key priorities and making recommendations. The project completed in August 2021.

Lifted Carers Centre – Emma Gerrard, Centre Manager, is working on a **business plan** with an experienced Cranfield Trust consultant, which includes an internal activity plan, priorities and responsibilities. Our consultant is also providing more general advice and support for the Centre Manager across the business. They are structuring the project around three workshops. Our consultant held workshops with the team in December '21 and February '22. They have explored the facets of the business model for the charity and how they should refine this going forward. Their next session just after Easter, will put together the action plan based on the findings of the previous two sessions. Emma is very satisfied with the support she is receiving: **"Many thanks for the session last Friday. I came away feeling reflective and challenged and I know our other members gave positive feedback too." "This is definitely a most productive process that you are guiding us through."**

More Than Grandparents (MTG) – CEO Melanie Nicholls is working on a **business plan** with our volunteer, Amber Hill, who is a business consultant and auditor. **"All in all, I'm really happy with the support provided and I have a really positive relationship with Amber who I think is just amazing."** MTG has completed a pre-project organisational assessment through our Journey 2 Excellence framework. Progress on the project has been limited by newly emerging issues affecting business and internal capacity but we agree that ongoing and patient support for MTG is very important.

Kinship Care Midlothian (KCM) – Lynda Maguire at KCM requested support with a **strategic development** project. They completed a pre-project J2E assessment with their Cranfield Trust Project Manager, who has placed experienced volunteer, John Nicolson, with the charity. John met the Kinship Care team at their office in Dalkeith on Friday 4 March, discussed their future objectives and undertook a SWOT analysis. The project is ongoing. John is due to go back to the charity now with further guidance on taking the strategic development project further.

Other work completed around enquiries/applications as part of Year 1 of this programme:

- **Band of Brothers** – CEO submitted an application for support for Consultancy, which was approved. We delivered an initial Project Manager meeting, scoped a project brief and provided advice. Ultimately, the charity did not take up the offer of support and did not proceed to a full project. They have indicated to us that they no longer required the support.
- **Band of Brothers** – also requested Mentoring for their new Chairperson. Cranfield Trust queried whether this was appropriate as i) the request didn't come directly from the Chair; and, ii) their Chair is an experienced voluntary sector professional albeit not as a Chairperson. A Mentoring assignment won't work unless the Mentee is driving/engaged in the application. Ultimately the charity reverted to us to confirm that they were no longer looking for a Mentor.
- **Signpost Stockport for Carers** – First registered with us in March '21. Enquired about Business Plan consultancy. In May '21, our Project Coordinator spoke with CEO, who shared that she had now accessed pro bono mentoring and marketing support, and therefore did not have capacity to take on another consultancy project at that time. We closed the enquiry for now but emphasised that our support was available at the right time for the charity. (This organisation is now receiving support via the Spark Programme as a young carer grantee).
- **Clean Sheet** – enquired about a Business Plan review and Mentoring. We didn't receive their full applications so we eventually closed those enquiries. However, they have contacted us again for advice in Feb 2022, after watching one of our free webinars.
- **Carers Support Merton** enquired about Business Plan consultancy. We didn't receive their application and we eventually closed the enquiry due to lack of response.
- **Carers Together** also enquired about Business Plan consultancy. We didn't receive their application and again, we eventually closed the enquiry due to lack of response.
- **Hopelinks Ltd.** – Our Project Coordinator spoke with Hopelinks Ltd's founder as part of the enquiry process and she requested advice on formally constituting as a non-profit organisation. As we can only work with already formally structured not for profit organisations and we do not provide support around setting up as one, we were unable to work directly with Hopelinks (i.e. they did not meet our eligibility requirements and they needed a service that we do not provide.) At that time, we referred them to other organisations which do provide that advice and guidance, as well as to our own resources.

Year 1 Grant Spend: Based on progress on initiated projects to date, we used £18,500 of our allocated grant of £25,000 as part of our Year 1 programme (as we have only allocated grant funds to referrals, enquiries and applications that progress to full projects.) We have re-allocated the £6500 in unused grant spend to our Year 2 funding to deliver the Spark Programme, which has additional elements, incorporating 2 Peer to Peer Exchanges alongside Consultancy and Mentoring support.

Next steps:

1. We will continue our work with all charities currently engaged in projects with Cranfield Trust and we will monitor these assignments through to completion. We will report again on final outcomes of the first year of support on completion of the assignments (anticipated to be in 2022) and share the findings of assessments using our [J2E impact framework](#).
2. We have drawn lessons from year 1 of the programme, as well as our work on other programmes and across our very large client portfolio, which has helped us to develop the programme and support available to grant holders as part of our Year 2 support.

Comments and Observations about Year 1 of the programme.

We are pleased to be providing support for 7 organisations as part of this programme.

The project focus areas of this programme broadly align with the issues in our wider work

Six out of the eight projects requested were strategic/business plans. We also had one governance project and a mentoring assignment (now complete). These needs reflect the most commonly requested types of support within our wider client portfolio.

While the 15 charities referred to us were all positive about wanting support, the number of charities we ultimately supported with projects was lower (7) than we originally anticipated. A number of charities took up a project enthusiastically and these projects have progressed gradually.

This is not surprising, due to the current pressures on charities and charity leaders. The pandemic created severe turbulence for charities, particularly in frontline charities providing caring services. It is part of Cranfield Trust's standard model to be patient in supporting clients, continuing to be available and responding to their timetable. They need to have time to work with us, so we do not put charities under pressure to work with us or give them deadlines. We do close enquiries and projects by mutual agreement when they are not progressing or no longer meet the charities' needs. Our key message to eligible charities is that our support is available when they are ready but we urge them to follow through on the recommended next steps that we give them.

Charities continue to face difficult challenges. The pandemic has worsened the overall sustainability and effectiveness of charities that were already vulnerable. We do not recommend for charity leaders to remain in 'firefighting' mode for any longer than necessary as this quickly leads to organisational fragility.

Charities that are more successfully navigating turbulence are those demonstrating a number of traits: effective boards and sound constitutions, well supported leaders, appropriate staff/resourcing, the ability to scenario plan and forecast cashflows, and the ability to draw all these factors together to support difficult decision making. With our services, particularly our consultancy and mentoring, we seek to build this capacity into an organisation and our Journey to Excellence framework is designed to capture, define and measure that progress. However, we know that charity leaders have to have the headspace to work with us, and we maintain contact and ensure that they know that support is still available

We continue our efforts to communicate the benefits of capacity building support and motivate charities to take up support

This is part of Cranfield Trust's overarching role and a key element of our 2021-25 strategy for supporting the voluntary sector. When working with partners to provide programmes of support for grant holder charities, we want to ensure that we are adopting the correct approach for communicating with grant holders about the value and accessibility of the available support, motivating them to take up the offer, providing a formal framework and expectations for how they can hope to benefit from engaging with support, alongside a high degree of flexibility to meet charities' very individual needs. In alignment with this, we have adjusted the structure of the programme with The Triangle Trust 1949 Fund in Year 2's Spark programme, increasing the level of briefing via a formal session for every grantee about the different support available.

Detailed summary of progress to date on the programme

Charity	Cranfield Trust Region	Support originally requested	Stage	Brief Details	Comments and Observations
EX-OFFENDER ORGANISATIONS					
Insideout Support Wales	Wales	Consultancy: Business Strategy Support	Monitoring – close to Completion	Jamie Gundy, Co-Director, requested support to deliver a new strategy and business plan for the organisation, supporting operations and fundraising effort.	Jamie Gundy, Co-Director, was paired with an experienced Cranfield Trust consultant and mentor. The business planning project is completing in March 2022. A strategy and business plan has now been developed and IOSW will be using this to support both their operational development and their fundraising efforts. We will be evaluating this project using our J2E impact assessment framework plan as part of project close down. See case study on pages 8 - 9.
On the Out CIC	NW England	Consultancy - Business Plan	Completed	CEO requested support with developing organisational business plan.	On the Out CIC applied for support with business planning. We assigned an experienced volunteer with a strong background in charity business planning and fundraising. The project is now complete and CEO Helen has provided strong feedback about the support she has received through the programme. Helen explained that the support provided by her Cranfield Trust volunteer has been a huge benefit and the charity is now seeing this extra work coming in with the resulting recognition of their services. Helen also cited that their learning from the project was excellent.
On the Out CIC	NW region	Mentoring for Director	Completed early	CEO requested mentoring support	CEO had requested and applied for Mentoring and was paired with an experienced CT volunteer mentor. (CEO wasn't able fully to take advantage of the support available due to constraints on her time. We decided with Helen and her mentor to close this assignment early.)
CARER SUPPORT ORGANISATIONS					
Family Tree Wirral	NW England	Consultancy – Governance	Completed	Tony Lawrence, sole employee and Trustee, requested support for a Governance review to provide advice on current challenges.	Tony was paired with an experienced volunteer consultant and mentor. Volunteer produced a report which was focussed on highlighting the scale of the issues and challenges facing Family Tree Wirral. 5 key priorities were highlighted in the report, which also recommended that the charity consider its future as an organisation. We were told that the next steps for FTW were

					<p>to organise an Emergency General Meeting but, despite enquiring, we have not received feedback about the progress or outcomes of the EGM.</p> <p>We have received positive feedback from FTW around the project: they have stated that the project was 'very useful', the project learning is 'very good', the client is 'very satisfied', and they would recommend the Trust to other charities. Despite the original request being completed, it has not been possible to garner further feedback or to take FTW through the J2E impact assessment framework process.</p>
Lagan's Foundation	NW England	Consultancy – Strategic Review	Completed	<p>CEO and Founder Carren Bell requested support with business strategy and growth planning, from which they could also build a marketing strategy and plan.</p>	<p>Initial project start was delayed by severe flooding at Lagan's Foundation. The first proper meeting between the charity and volunteer took place in July. The main issues facing the organisation were characterised as stemming from lack of organisational processes and some leadership skills as a result of unprecedented growth over the last 18 months. Our volunteer agreed to work with Carren to put together an action plan with clear outputs and that they would need to work around Carren's schedule as there was ongoing business building work that she needed to supervise.</p> <p>The strategy review is now completed. The charity has gained a better strategic plan and learning from the project, which will enable them to support more children and families in future.</p> <p>At the outset of the project, Lagan's Foundation had completed a pre-project 'J2E' and we will be evaluating this project using the J2E impact evaluation framework.</p>
More Than Grandparents	NE England	Consultancy – Business Plan	Project started 24/3/2021 & ongoing	<p>CEO has requested support and 'mentoring' of a volunteer to work with her and a small group of trustees to develop outline business plan and also consider budget/cashflow, fundraising, effective</p>	<p>This programme is progressing well, albeit progress has been slow. More Than Grandparents' CEO has been paired with a volunteer, who is an experienced business consultant and finance/auditing professional. The relationship between the volunteer and charity is very good and productive. Progress was delayed due to family illness and then summer holidays but the project is now making progress. They have completed a board skills/roles audit with a view to strengthening board support for the CEO. Now they are engaged in financial/business planning.</p> <p>In December, Melanie Nichols, CEO, says of working with Amber: "I really couldn't be happier with how things are going with Amber. We get along really well and she understands me and where I'm at with things and she has</p>

				governance and trustee skills.	a fabulous understanding of the aims of our charity due to her own personal experiences. Things were slow to start but understandable given the current climate. We have now completed a skills matrix exercise with our trustees so we can see where the gaps are and better understand what skills we need our future trustees to have. We will be moving towards recruiting new trustees in the new year. Once we've done this we are going to look at financial planning so we can build on our resilience further. Honestly, I would snap Amber up as an employee or trustee in a heartbeat, she's brilliant and lovely with it. You have certainly done a good job with your match making." A pre-project J2E assessment has been completed and we expect to evaluate this project using the J2E impact evaluation framework.
Lifted Carers Centre - Elevating Parent Carers	NW England	Consultancy – Business Plan	Project started 15/7/2021 & ongoing	Emma Gerard, CEO, has requested support with business planning and assistance to put systems in place to become more robust as a relatively new independent charity.	Centre Manager Emma was paired with a very experienced volunteer to work on producing an outline business plan/action plan with key actions/priorities identified and responsibilities, and the volunteer is providing ongoing advice and support. The charity and volunteer are structuring the project around three workshops. Our consultant held workshops with the team in December '21 and February '22. They have explored the facets of the business model for the charity and how they should refine this going forward. Their next session just after Easter, will put together the action plan based on the findings of the previous two sessions. Emma is very satisfied with the support she is receiving. A pre-project J2E has been completed. We expect to evaluate this project using our J2E impact assessment framework once completed.
Kinship Care Midlothian SCIO	Scotland	Consultancy - Strategic Development	Project approved, 18 August '21; Met CT project manager, Nov '21.	Initially were interested in Mentoring or other support for Administrator Lynda Maguire, as well as short-term advice on recruitment of first paid post.	An application for support was submitted and approved in Aug 2021. Kinship Care Midlothian (KCM) needed to reschedule their first project manager meeting, which did not then take place until Nov 2021. At this meeting, it was agreed that a strategic review and business plan is the priority as the current one is to March 2022. KCM's Administrator Lynda also remains interested in mentoring and funding support/ strategy but has too much on to run two projects so these might be good next stage projects to consider after the strategic development project. A very experienced volunteer is now working with the charity. A pre-project J2E assessment has been completed and we expect to evaluate this project using the J2E impact evaluation framework.

CASE STUDY: Inside Out Support Wales

Consultancy: Strategic Development and Business Planning Support

Background

Inside Out Support Wales (IOSW) was established in March 2019. It is a community interest community ('CIC') that aims to offer general and bespoke support and guidance for people with convictions. IOSW works with those wishing to set up in self-employment, access further or higher education in the community or enter into employment. Its services include mentoring, as well practical support and advice to support transition back into the community, self-employment and accessing education, training and employment.

Reoffending rates in Wales have increased according to the latest figures from the Ministry of Justice. The cost for keeping a prisoner in jail for one year is now estimated to be £43,213 a year or £118 a day; an increase of 6% in the last 12 months. This is exacerbated by the fact that a third of people who are released from prison go on to re-offend within the first 12 months. This continues to present a huge amount for the taxpayer.

Inside Out Wales aims to assist in reducing the reoffending rate. Alongside this, and as a consequence, IOSW aims to help reduce the cost of re-offending to society.

IOSW has a small team of three Co-directors, one sessional team member employed on a freelance basis, and one volunteer

The Issue

IOSW came to Cranfield Trust for support in May 2021, through a programme of grant holder support that we are delivering in partnership with The Triangle Trust 1949 Fund.

IOSW's previous Business Plan was pre-Covid but delivery of this plan had been put on hold, as were all other strategic considerations, as the company had struggled to remain afloat during the pandemic. Since the start of the pandemic, the company's planning had been both reactive and Covid-response based but the team now felt ready to commit to a new business development project as the company was finally in a position to start considering its future again.

During the pandemic IOSW had experienced severely reduced opportunities for revenue generating activities: this had been a consideration when the company was first formed, which was the reason it had been established as a CIC. The issue of funding has been a constant one during both the pre and post pandemic periods. One of the aims of asking for consultancy support was to produce a strategy and a clear road map that would help support fundraising efforts.

The Solution

In August 2021, Cranfield Trust Project Manager, Jayne Kendall matched Jamie Grundy, IOSW Co-Director with Cranfield Trust volunteer, Gary Metcalfe. Gary is an experienced organisational development practitioner and also has volunteered with Cranfield Trust as a consultant, mentor and peer facilitator for several years.



Throughout Autumn 2021, Gary worked remotely with Jamie to understand IOSW's needs and objectives and held several face-to-face meetings with the IOSW team to map out their business development strategy, asking questions and challenging their thinking along the way.

Gary also worked with the team to help adapt their training packages to make them more streamlined and efficient, and he reached out to his own network to seek out opportunities to promote the support on offer from the charity. This has resulted in the Wales Board of the Chartered Management Institute agreeing to host an online event with IOSW around the subject of 'Why Employ Ex-offenders?', an event that will give the charity more exposure to businesses and leaders across Wales. As Gary explains, *"With the aid of associates in my wider network, we are organising a webinar that will raise awareness of IOSW and engage businesses across Wales and the UK of the benefits of employing ex-offenders."*

In December 2021, IOSW learned that they had been successful with their application for a significant grant from the National Lottery. Jamie Grundy wrote to Jayne Kendall, "Thank you again for your help thus far, as it has been a significant help to us as a small and developing team."

The Impact

The business planning project is completing in March 2022. A strategy and business plan has been developed and IOSW will be using this to support both their operational development and their fundraising efforts. IOSW is also keen to work on another project with Cranfield Trust in the future.

Jamie Grundy spoke about how the project has already benefitted the organisation with planning how to deliver its services in the post-Covid environment. *"As a small and relatively new organisation with a nationwide remit, this support was fantastic, especially as we emerge from the pandemic. We have had to translate our business offering from in-person to virtual support, during Covid, and then into a blended offering as we exit the pandemic. Also, we have been able to access new markets, something we were unable to attain previously. This would not have been possible prior to the support offered through our business mentor."*

Jamie also explained how the project afforded him and the other Directors the space and opportunity to commit time to think and plan for the future – something which many not-for-profit leaders find challenging: *"The support has had an immediate impact in being able to allow us as Directors a specific and focussed period of time on our business plan. Sometimes when you are involved in a supportive and supporting organisation, the opportunity to pause, reflect and then critically analyse is rarely offered. The support offered through a business mentor, not only provided this opportunity, it also has allowed us to develop as a funded and increasingly revenue generating social business."*

For Jamie personally, the project helped to build his confidence that he was making the best decisions possible as a leader and director. *"Having such expert support gave me as a Director a reassurance that the big decisions we were taking at a strategic level, were the right ones made at the right time. I was confident in the work both of myself and my fellow directors, that we are fulfilling our social mission to our service users, in the best possible way."*

For Gary, Cranfield Trust's volunteer, this has been another rewarding experience of supporting a charity: *"This has been a great opportunity to work with a charity that is making a positive impact and empowering ex-offenders to make a difference when they return to their community. It was enlightening for me to work with the Team and to see what difference they have made."*

"The team at IOSW were on the right tracks and held the solutions to their own challenges – they just needed a 'critical friend' to listen, affirm their plans and give advice for actions they had not considered."