

**2017 Programme**

**Case Studies**

February 2018

**HCF**

Training and Development



**Building  
Effectiveness**

**in the Hertfordshire Voluntary Sector**



# Building Effectiveness

## Overview

# Building Effectiveness Programme Overview

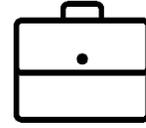
- To run initially for 2 years starting January 2017
- 10 voluntary and community organisations each year
- A 9 month tailored improvement programme
- Funded by the Garfield Weston Foundation and Will Hobhouse (High Sheriff for 2017)



**Assessment**  
Jan-Feb 2018



**Planning**  
Mar 2018



**Development**  
Apr-Dec 2018



**Review**  
Jan-Feb 2019



**Awards**  
Mar 2019

<p>Advisor supports board and CEO</p> <p>Use <i>DevelApp</i></p> <p>Identify strengths &amp; weaknesses across 8 key functional areas</p>	<p>Development action plan – tailored and prioritised to address:</p> <ul style="list-style-type: none"> <li>Identified weaknesses</li> <li>Existing needs</li> <li>Strategic ambitions</li> </ul>	<p>Operational changes and improvements</p> <ul style="list-style-type: none"> <li>Business mentoring</li> <li>Governance training</li> <li>Trustee recruitment support</li> <li>Leadership workshops</li> </ul>	<p>Track progress across all functions (<i>DevelApp</i>)</p> <p>Evaluate impact of programme on effectiveness</p> <p>Case studies</p>	<p>All participating organisations invited to Awards Ceremony</p> <p><b>BE Better Awards:</b></p> <ul style="list-style-type: none"> <li>Winner £5,000</li> <li>Runner-up £2,500</li> </ul>
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# 2017 Participants





# Building Effectiveness

## 2017 Stories

# Crossroads Care Hertfordshire North

## Overview

Crossroads supports 1,200 vulnerable people and their unpaid carers a year in Hertfordshire and surrounding areas. They provide respite breaks for health or leisure; day centre respite; support to find employment; home adaptations and homecare services.

## Why Building Effectiveness?

They saw the programme as a way of gaining “critical friends”, sharpening their objectives and skills and hopefully in gaining and making a contribution to the local sector in ways they perhaps cannot easily measure. They were excited about the involvement of many large and small local not-for-profits, HCF, Cranfield Trust and Will Hobhouse.

## Summary of Development Action Plan

Their main aim was to develop their strategic marketing to support growth & effectiveness as the initial baseline analysis showed that marketing and communications was the area with greatest potential for improvement. Given the aim to increase their non-statutory funding, it was clear to the board and management team that marketing and sales should be the focus.

## Main Achievements and Outcomes

- Agreed and implemented a new marketing and sales strategy
- Modernised their constitution & governance to streamline decision making
- Agreed a new set of organisational values
- Agreed a substantial investment in digital technologies
- Transferred a substantial volunteer service into the organisation to help those who have no recourse to funds
- Doubled their non-statutory income generation
- Restructured their Marketing, Finance, Client Services & local leadership teams



***“We achieved our principal goals in the year showing that we could operate both as a charitable organisation and one that can offer contract services. We helped thousands of visitors with peer support as well as helped many people to get the quality essential services they need. We are grateful for the time & energy that everyone has given to this programme and would recommend it to any organisation of any size.”***

Michael Farrell CEO



# CVS Broxbourne & East Herts

## Overview

The organisation was established in 2007 and provides services that aim to develop, enhance and empower voluntary & community groups to effectively serve their communities. They also deliver local community and public health projects.



## Why Building Effectiveness?

After a successful 10 year period of achievement and growth, the CVS recognised the need to make changes to their organisation to best navigate through the challenging times that they as part of the local charitable sector are facing. The supportive 5-step structure of the Building Effectiveness programme appealed to them as well as the opportunity to strengthen their Trustee Board and re-consider what how best they should staff the organisation. They felt the programme also offered continuous learning that would provide the knowledge and skills to equip them for the future.

## Summary of Development Action Plan

The main areas tackled with the support of Naveed Ahmed from the Cranfield Trust were:

- Development of a 5 year business and strategic plan, addressing their service offering and income generation
- Re-structure their staff team to create “one organisation” rather than project delivery model and to provide opportunities for personal development
- Re-structure the Trustee Board so members have functional roles in line with staff team

## Main Achievements and Outcomes

- Improved strategic thinking and a clear process to making business decisions about what projects/initiatives they should take on.
- More focussed, better engaged staff team with a structure that improves effectiveness, internal communication and greater opportunities for personal development
- Strengthened trustee board with defined functional roles enabling improved governance and engagement with the staff team
- Members, clients and other stakeholders are already benefiting from a more streamlined operation that will help to sustain their services into the future



***“Our Building Effectiveness experience has been invaluable in helping to take stock of our current situation and plan for the future. As a result we are a better managed, more business focussed organisation that has an enhanced awareness of our current services. This includes a thorough assessment of why we deliver them and the impact on beneficiaries, stakeholders and our own capacity levels. We would certainly encourage other groups who are willing to challenge their own thinking and commit to a year-long process to participate in the future and benefit from the great support and expertise that is afforded to them throughout the programme.”***

Ian Richardson, CEO

# Grove Cottage Bishop's Stortford Mencap

## Overview

Grove Cottage was formed in 1966, and the current building was officially opened in 1972. The organisation provides social and educational activities for people of all ages with a learning disability to develop their potential, avoid social isolation by supporting lifelong friendships and to provide respite for families.

## Why Building Effectiveness?

Their long-term goals are to rebuild the current premises as it is no longer fit for purpose and to expand the provision of services. As part of that journey, they acknowledged that their internal business practices were not as efficient and effective as they should be and that if they were to seek funding from external sources there was a need to illustrate that they had made significant improvements to their working practices. The Building Effectiveness programme came along at just the right time to help.

## Summary of Development Action Plan

The primary strategic objectives, were to make the organisation more efficient and effective to deliver services in a better and more coordinated way and to make the organisation appealing and credible in the minds of potential funders. The key priorities identified in the baseline assessment were:

- IT - they needed a system to improve the efficiency and effectiveness of the operation
- Development of their fundraising capability and strategy to raise the money needed

## Main Achievements and Outcomes

- Improved business processes – maximising value whilst improving services
- Identified, purchased and implemented a new IT system
- Increased the staff dedicated to fundraising – and re-focussed effort from community events to seeking long term support from grants and trusts
- Employed a volunteer co-ordinator to nurture and develop a key group of people essential to the well-being of the charity

The organisational and business improvement ideas arising from the sessions with their HCF advisor inspired and motivated the Trustees and the staff team. The mentoring with consultants from the Cranfield Trust gave them a substantive plan to move forward.



***“Our Building Effectiveness journey has provided a springboard for us to assess the way we deliver our services and to plan for the future so we can realise our dream of a new building providing better services for another 50 years. I would advise any groups thinking of embarking on the process to do so without hesitation. Where else would you get 12 months’ worth of free advice and guidance from professionals who are motivated by a desire to help an organisation to get better and achieve your goals and ambitions?”***

Kevin Davis, Chair

# HACRO

## Overview

Formed in 1974, HACRO supports offenders, potential offenders and their families to manage positive change in their lives; to engage with influential partners in the community of Hertfordshire and neighbouring counties; and work to establish a range of education and training initiatives with a focus on gaps in provision.

## Why Building Effectiveness?

HACRO wanted to join this programme in order to have support towards their aim to modernise the organisation and make it fit for purpose and sustainable for the 2020s: more efficient; more measured; better organised; better connected online; in short more competitive, in a world where charities have to compete for funding and show they can deliver results.

## Summary of Development Action Plan

HACRO's plan included:

- Reorganising and strengthening its Trustee Board along functional lines
- Increasing their resource in back-office support
- Improving the organisation's efficiency
- Modernisation to attract and engage with younger volunteers

## Main Achievements and Outcomes

HACRO now looks more like a small business with a charitable heart, an essential change in today's market place. 70% of their income will now come from contracts and they have put in place the basis of an organisation structure that can deal with that.

Benefitting from their advisor's input, their trustee board reorganisation enabled them to undertake an important new project – WorkAbility – taking offenders from sentencing to work experience, in one holistic and connected support programme. Their mentor opened doors to establish new partnerships which helped obtain the funding for WorkAbility in Hertfordshire. This would not have happened without Building Effectiveness being the catalyst for change.



***“The biggest challenge has been to run the day-to-day organisation whilst thinking about, discussing, selling, agreeing, and finally implementing change. The workshops and inputs from our advisor and mentor have really enabled HACRO to cope. The importance of making time and allocating dedicated resource to engage in the programme is the key to making a success of it.”***

Neil Ashley, Chair

# Headway Hertfordshire

## Overview

Headway Hertfordshire was formed in 1997. It promotes awareness and understanding of all aspects of acquired brain injury and provides information, support and services to people over 18 with an acquired brain injury, their families and carers.

## Why Building Effectiveness?

Headway urgently needed a full and comprehensive evaluation of their services, structure and processes to become “fit for purpose” for the future right across the organisation.

## Summary of Development Action Plan

Headway’s action plan included:

- A full assessment of the organisation including a SWOT analysis
- Identification of the organisation’s structural issues
- Preparation of a new strategic plan for the next 3 years - their 2020 Vision

## Main Achievements and Outcomes

- The organisation is more focused on its mission.
- Much higher levels of motivation and energy across the trustees, staff and volunteers
- Stakeholders are more aware and supportive of Headway’s direction of travel and how they will grow their work
- The board is committed to supporting the need to be more proactive and productive
- Organisational changes are beginning to have a positive effect.



***“We are very grateful for the support this programme has provided. Our Advisor was a critical element in the earlier stages – Viv’s input throughout the project has been valuable. Our Cranfield Trust Mentor, Steve, was instrumental in focussing on the priority needs and developing stretchy but achievable targets to give the charity direction. I personally benefited from the regular workshops with the other organisations to discuss key topics and learn or refresh vital business approaches.”***

John Archer, CEO

# Herts Inclusive Theatre

## Overview

Herts Inclusive Theatre (HIT) was formed 16 years ago to change the lives of disabled and disadvantaged people. They do this by using drama, movement, music, and theatre techniques to build people's confidence, communication skills and to help improve their social inclusion.

## Why Building Effectiveness?

HIT applied for the programme as they wanted to enable the Artistic Director and Producer, together with the Board of Trustees to strengthen the organisation.

## Summary of Development Action Plan

Key elements of HIT's plan were:

- To strengthen the Board of Trustees via training and recruitment
- To develop a business plan and fundraising strategy
- To plan succession within the core staff team
- To strengthen their finance system.

## Main Achievements and Outcomes

- The Board of Trustees is now much stronger thanks to recruiting seven new trustees with key business skills
- The Artistic Director has gained confidence as a leader
- They have restructured the office staff resulting in her team feeling much more engaged and enabled

There are clearer office procedures and improved contractual agreements



***Herts Inclusive Theatre has come out of the Building Effectiveness programme a more robust and stable organisation, with a staff team who feel supported from the top and an idea of where the organisation is headed in the next 5 years. I found the workshops especially helpful to meet and learn from other organisations and to take on new fresh ideas and skills.***

***The fact the HIT was chosen to take part alongside other charities that we admired, motivated us from the outset. It really energised the whole team to get behind making improvements, and also helped to get the new trustees on board.***

Caroline Stevens, Artistic Director

# Herts Young Homeless

## Overview

Herts Young Homeless (hyh) was formed in 1998 providing services to support vulnerable people in Hertfordshire who are in housing need. Their focus is on preventing homelessness - from education in schools and family mediation through to supporting 16-24 year olds in their first homes or caring for adults of all ages who have complex mental health issues and housing needs. Their free services empower people to be able to deal with difficult situations in their lives, give them the ability and confidence to 'do it themselves' and ultimately find stability.

## Why Building Effectiveness?

Within a climate of austerity cuts, organisational restructure and continual increase in demand for services, hyh recognised the need to act decisively to shore up their long term future. The opportunity to be part of the Building Effectiveness programme could not have come at a better time, giving them the opportunity to review the charity's direction and define and consolidate a strategic plan to deliver effective homelessness prevention services.

## Summary of Development Action Plan

With the support of Steve White, their mentor from Grant Thornton LLP, they developed a 3 year strategic plan comprising:

- Review of core services
- Development of a performance monitoring dashboard for the Trustees
- Diversification of income streams by developing a social enterprise
- Funding and communication plan

## Main Achievements and Outcomes

During a period of immense change, both their mentor, Steve and Will Hobhouse encouraged and facilitated hyh to think forward. Moreen, their advisor helped the CEO to draw out from Develapp the areas they needed to focus on. Their external perspective proved invaluable in enabling hyh to be less reactive and more proactive. Management teams are now more confident and energised with a clearer focus on the next 3 years. The programme sharpened and quickened the pace of board transformation and helped challenge them to focus on their core objective of preventing homelessness.



***“Having the opportunity to network with other charities who shared many of the same issues and challenges was really valuable; as was the learning that came from discussions in the workshops. Integrating the theories from Cranfield Trust into the realities of hyh enhanced our work on our values and our process of change management and has helped us to establish our ‘hyh way of being’. The programme has been excellent and we are so pleased to have benefitted from it this year.”***

Helen Elliott, CEO

# Home-Start Watford & Three Rivers

## Overview

The organisation was established in 1993. They offer practical and emotional family support, in the families own home, by trained volunteers. The aim is to empower families in developing coping strategies to become self-sufficient. In addition to home visits, Home-Start provides family groups in the community; thus enabling access to parenting support and play activities.

## Why Building Effectiveness?

After a challenging 18 months, having faced a 40% cut in income and the loss of both their office and shop premises, Home-start were ready to evolve and transform to secure their future. They recognised the need for advice and support to develop the opportunities they had secured into sustainable funding streams. Their Building Effectiveness application stated that they were 'on the cusp of new and exciting opportunities'.

## Summary of Development Action Plan

- Invigorate and upskill the staff team to enable the development to continue long term.
- Reshape the Trustee Board to include a diverse mix of skills to support the growth, development and sustainability of the organisation long term.
- Improve internal processes developing efficiency and minimise data handling.
- Generate 60% of income requirements by developing a thriving social enterprise

## Main Achievements and Outcomes

- A clear organisational structure, improved processes for planning and a shared vision throughout the organisation has helped to attract new funding streams.
- Trustee board is more strategic and engaged with clearer roles and take on tasks (e.g. H&S inspections) to free up staff to focus on service delivery.
- More time and resource effective – helped by implementing a new accounting package
- Opened two new shops, made a successful application to the Big Lottery and developed new skills in marketing and branding. They now have 4 years of sustainable funding and have improved their ability to attract new volunteers.



***'We had been paddling furiously for 18 months just to survive and needed to stop, think and gain direction. Sue, our advisor supported us to develop a shared organisational vision, a clear goal. Henry Holland-Hibbert, our mentor, immediately understood our 'Home-Start' brand and was able to interpret the actions we needed to take to develop it. The programme also gave me the time to step out of the office, learn from peers and facilitators and assess my own skills and capabilities. The result of this programme is that we started with opportunities and ended with achievements.'***

Emma Power Scheme Manager

# Rennie Grove Hospice Care

## Overview

Rennie Grove Hospice Care was formed in 2011 following the merger of two smaller charities. It offers excellent specialist palliative care and support for adults and children diagnosed with a life-limiting illness within North West Hertfordshire and parts of Buckinghamshire. The services include 24/7 responsive hospice at home, a range of therapeutic and days services for patients and families both during illness and after bereavement.

## Why Building Effectiveness?

Rennie Grove applied to the programme because at the time they recognised that there were both clinical and financial pressures, due to increasing demand for their services, which needed to be addressed before they became a significant problem. They wanted a programme which would have a strong developmental focus and Building Effectiveness offered the right mix of support to help achieve their organisational objectives.

## Summary of Development Action Plan

- The Cranfield Trust mentor helped them to prepare the organisation for future challenges including a review of their clinical model and income generation
- DevelApp identified a few gaps in organisation's already robust governance processes which they were then able to address further
- Their mentor supported the Director of HR in developing an organisation development framework

## Main Achievements and Outcomes

- By focusing on the key objectives identified, Rennie Grove are pleased with the progress made. The areas identified as requiring change will inform the new strategic plan.
- The review of the clinical structure and model of care has resulted in the introduction of a new clinical assessment process that will help to manage demand.
- All trustees benefitted from training on their roles and responsibilities - this has strengthened their understanding of good governance considerably.
- The programme helped the management team to work together on shared objectives
- External review, challenge and discussion has helped them to adopt new ways of working



***“If you enjoy learning with others in a supportive environment and want to achieve your organisational objectives with tangible outcomes in a timely way then this is the programme for you. Every workshop is well prepared, structured and challenging whilst being informal and fun. I would recommend Building Effectiveness to any charity which believes in the importance of organisation development and continuous learning.”***

Jenny Provin, CEO

# Watford FC's Community Sports & Education Trust

## Overview

Watford FC's Community Sports & Education Trust (the Trust) has been working in the community since 1992. It uses the power of sport and learning to run a diverse range of community projects which engage people, inspire and enhance lives. These projects cover the key themes of sports participation, education, social inclusion and health, and the Trust also runs two community facilities.

## Why Building Effectiveness?

The Trust has grown significantly in recent years and the instigation of the Building Effectiveness programme was a timely opportunity to take stock, review and plan for the next phase of the Trust's development. This included the opportunity to benefit from some independent, professional advice, to network and learn from others and to use the project framework and timeline to encourage continuous improvement in the Trust.

## Summary of Development Action Plan

After careful consideration, the Trust identified seven broad objectives and decided to focus on two key strategic areas;

- Development of a strategic plan setting out the direction of the Trust, with the support of their mentor Ben Gordon.
- Improving the overall board governance practice and systems, with the support of the Trust's Board.

## Main Achievements and Outcomes

- The Community Director has had the opportunity to reflect on The Trust's challenges and focus on strategic business decisions.
- Re-enforced the value of building strong foundations, leading the Trust to create a long term continuous improvement plan.
- It has encouraged the Trust to implement new working practices e.g. performance trackers, and improved internal communication, leading to a more focused and engaged workforce.
- Helped to increase board engagement and led to a closer working relationship between the board, senior leadership team and the wider staff.



***“Building Effectiveness has been a great experience for us. It has helped to strengthen our foundations, which will make us more robust and resilient as an organisation, meaning we are more likely to be here for another 25 years!”***

Rob Smith, Community Director



*Left to right: Sarah Elliott, HCF Project Manager; John Archer, Headway; Rob Smith, Watford FC CSET; Will Hobhouse; Jenny Provin, Rennie Grove; (rear) Michael Farrell, Crossroads Care; Helen Elliott, HYH; (rear) Neil Ashley, HACRO; Emma Power, Home-Start Watford; Caroline Stevens, HIT; (rear) Kevin Davis, Grove Cottage; Ian Richardson, CVSBEH; Dawn Harrison-Wallace, Cranfield Trust*

A person in a red shirt and black pants stands on a narrow, dark rock ledge that juts out over a deep, blue fjord. The surrounding landscape is rugged and mountainous, with patches of snow on the peaks. The sky is a pale, hazy blue.

**“If it doesn’t challenge you, it  
won’t change you.”**

*- Fred Devito, Yoga Instructor*

ArtSportive