

STRIVE PROGRAMME REPORT

28 June 2018



INTRODUCTION

Launched in December 2016, STRIVE is an 18-month programme funded by the City Bridge Trust. STRIVE provides independent, confidential business advice and guidance to City Bridge Trust grant holders, helping them to address key management issues and challenges, and to improve their resilience and sustainability.

The Cranfield Trust has been working with charities for nearly 30 years, delivering management consultancy projects that support charities with everything from strategic planning to improving financial processes, building a strong board or creating an effective marketing plan.

The STRIVE programme's aims are to work with 95 frontline organisations in total, over an eighteen month period December 2016 – June 2018. Of the 95 organisations, 70 are City Bridge grantees, 25 are other charities operating in London, which fall within City Bridge Trust's and the Cranfield Trust's remit. We planned to complete the programme in May 2018, but as demand built over the course of the programme, we were granted an extension to end June 2018.

STRIVE programme projects are a substantial part of the Cranfield Trust's overall work in London, which in turn is the largest operating region of the Trust's national activities. This report is the closing report for the initial 18 month programme, aiming to highlight impact, continuing demand for The Trust's services and learning gained through the programme in the 18 month period.

During the STRIVE programme, the Trust has started new projects with 139 London charities in total, including 70 City Bridge Trust grantees. In total, we have had 187 projects active during the period. We have sought to learn more about the needs of charities for external support as part of the STRIVE programme, and have carried out a short survey, and held roundtable discussions, the results of which were published in a report 'Investing in the Sector, Investing in Ourselves'¹

From this we learned that areas in high demand for support matched the Trust's services well – strategic planning, marketing and HR were all areas where frontline charities are using, and need, external help. Another key learning experience during the STRIVE period was offering mentoring support to City Bridge Trust grantholders. A high level of interest, followed by some charities reviewing their requests to ask for other types of support, showed us that a clear, accessible offer of support helps charities to engage. We will be offering more straightforward 'packages' of support in this way in future.

It has been a privilege to work with the charities who have participated in STRIVE, we are grateful to the City Bridge Trust for enabling us to reach so many vital frontline charities with our support.

The Cranfield Trust

Fiona Fraser, Programme Manager

Alice Dabrowska, Head of Consultancy

Amanda Tincknell, Chief Executive

¹ <http://www.cranfieldtrust.org/sites/default/files/files/FunderPlusReport201803Web3.pdf>
STRIVE Programme Report to The City Bridge Trust

STRIVE PROGRAMME REPORT

28 June 2018



NEED FOR SUPPORT

We have continued to work to understand the needs for support in frontline charities, building on the experience we gather through our overall consultancy activity, and consulting charities about their challenges. Since reporting on the first twelve months of the STRIVE programme in early December 2017, we have held a roundtable event, in the presence of our Patron, Her Royal Highness The Princess Royal, and in partnership with The City Bridge Trust. This event aimed to better understand the support needs of charities and how funders and organisations like the Trust can improve non-monetary services and offerings (Funder Plus services).

Within the 12 month report The Trust identified five key trends in the issues and challenges charities are facing, and by early June 2018, we added a further trend in demand: organisations seeking to work more efficiently. These trends have been echoed in the findings of The Trust's 'Investing in the Sector, Investing in Ourselves' report (March 2018), published following the roundtable event.

12 month report trends	Investing in the Sector Report (p7) Top 3 Support Needs Identified by Charities
<ul style="list-style-type: none"> ● Limited capacity to plan ahead ● Weaker financial management and planning ● Need for stronger governance ● Increased need for Human Resources expertise ● Supporting and Developing Leaders ● Staff Optimisation – Improving efficiencies in processes and people. 	<ul style="list-style-type: none"> ● 55% Marketing and Communication ● 53% Strategic Advice ● 48% HR Advice

RESPONDING TO SECTOR NEED

In closing the first 18 months of the STRIVE programme the Trust finds that these key trends remain and the event findings clearly identify a continuing demand. In a survey carried out for the report, the Trust found that 82% of respondents had used external support in the last year, and 52% had used external support more than once in the past year. The identified need for leadership support resulted in The Trust offering a mentoring package which has been received very positively. In the next six months, if the Trust's application is successful, we propose to offer other 'packages' of support – clear offers of focused support to help organisations understand how we can help them. Further packages are potentially:

- HR Compliance
- How to get the most impact with an organisation's resources (LEAN processes)
- Essential financial management and forecasting

STRIVE PROGRAMME REPORT

28 June 2018



PROGRESS AGAINST STRIVE TARGETS

The table below demonstrates the number of projects active (from Application Approved to Completed) against the STRIVE programme targets. There have been 70 new projects with City Bridge Trust Grantees since the start of the programme, out of those 19 have completed and 2 have completed with advice only. There have been 12 follow up projects, separate projects that have either grown from or are running adjacent to an original project brief. All outreach projects (25) have been achieved, and our total number of new projects started in London in the 18 month period is 139 (70 STRIVE, 25 STRIVE outreach, and 44 independent projects). The 44 includes 5 projects whom are City Bridge Trust grantees but who have come to The Trust through another funder offer.

The total number of closed enquiries for the STRIVE programme has been included, to demonstrate that The Trust has received and investigated a number of potential projects. Reasons for projects not going ahead include: the lack of time and headspace to continue with a project, often due to operational pressures including GDPR, the charity having received support from another source, it just not being the ‘right time’, and in a small number of cases, ill health of staff members.

We also have a pipeline of 45 open enquiries – organisations which are interested in working with us.

PROJECT CLIENTS	June 2018 Actual	Target
CITY BRIDGE TRUST GRANTEES	70	70
STRIVE PROGRAMME OUTREACH	25	25
INDEPENDENT LONDON PROJECTS	44	
TOTAL	139	95
ENQUIRIES		
Open Enquiries	45	
Closed Enquiries	32	

1. COMPLETED STRIVE PROJECTS

1.1 Completion Roadmap

This section outlines the number of expected project completions over the next one, three, six, nine and twelve months. These numbers only define the projects which are being monitored and have been assessed by a Project Manager, seven projects have been approved and are pending a Project Manager meeting to define their support needs – we have not yet given an expected completion date for this group.



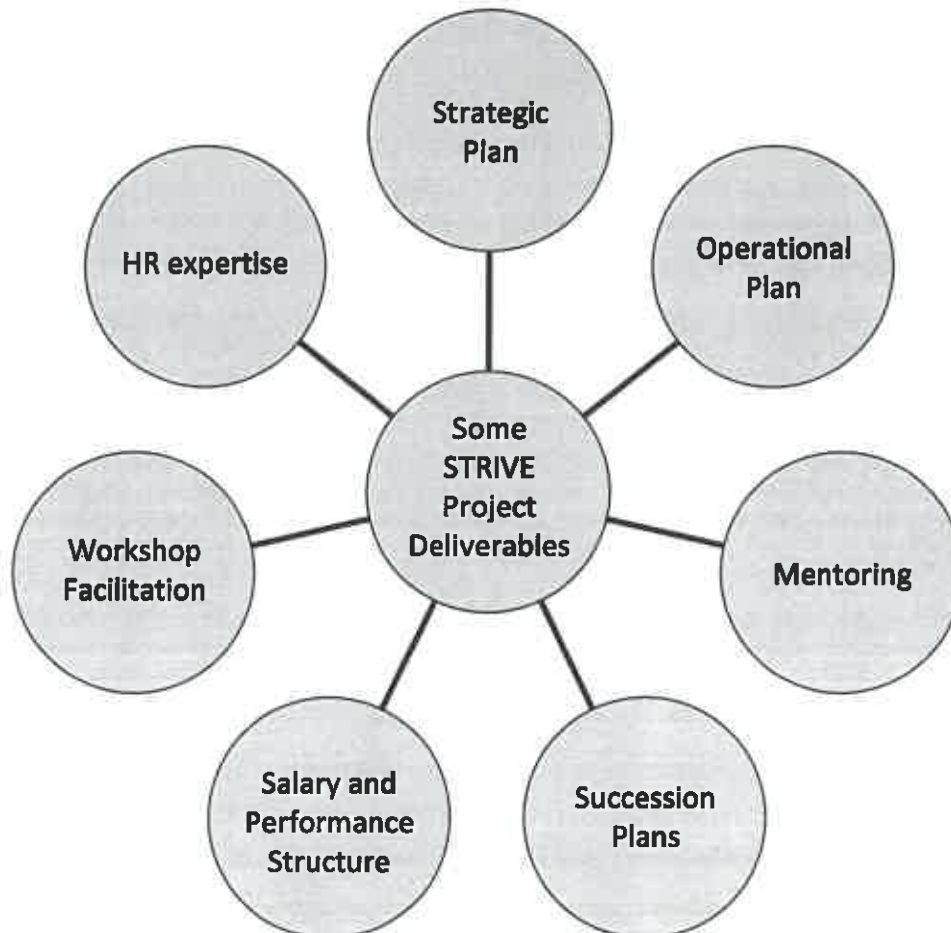
This chart shows that we expect a gradual increase of closures from this month onwards, peaking within the next 6 months (end October 18). We expect to have approximately 70% of the projects closed within 6 months. This number is an estimate, as expected completion dates may be updated by Project Managers as projects evolve.

STRIVE PROGRAMME REPORT

28 June 2018

1.2 Completed Projects High Level View

Appendix A (p17) outlines in detail the deliverables, satisfaction and learning levels for the 19 projects which have already been completed. It also gives impact statement for each project. Activities have covered a range of management topics, see below.



"Just wanted to let you know that our charity shop opens this morning! Thanks so much for all your help and support - wouldn't have had the confidence to do it without your assistance! Much appreciated!"

Feedback provided by the Cranfield volunteer was invaluable in planning future delivery. We feel we are on a much stronger footing as a result. It will enable us to continue delivering services that we know are greatly valued by local families.

We asked for the Cranfield Trust's support in connecting us with an expert who could advise us on the best way forward in overhauling our ICT/telephony arrangements; the Trust found us exactly the sort of adviser we needed, and we have now improved our ability to deliver services, and reduced costs! We are very grateful.

** ON FILE + AVAILABLE IF REQUESTED*

STRIVE PROGRAMME REPORT

28 June 2018



2. PROJECT ANALYSIS (STRIVE / All London projects)

Further to the report submitted on the 12 June 2018, this section compares and analyses STRIVE projects against the Trust's London wide projects.

2.1 Comparison by Project Type

The chart on the next page looks at the different STRIVE project types compared with the Trust's total London number.

Strategy is the highest ranking project type, with 39% of STRIVE projects being strategy and business planning projects, involving work with trustee boards and Chief Executives, considering the future direction and planning activities and resources for charities. 56% of our total projects in London (including STRIVE) are strategy projects.

The next top two project types for STRIVE are mentoring at 23% and HR at 13%, mirroring London overall with mentoring at 14% and HR coming third with 10%. We boosted demand for mentoring support by promoting this strongly in May 2018, and had a very positive response. Mentoring projects have become the second most popular type of projects both for STRIVE and London wide, emphasizing the increasing desire to improve and develop leaders.

Relating to the trends, governance projects have slipped down to just 1% for STRIVE projects against the London average of 4%. Interestingly, our four merger projects accounted for in London were all STRIVE projects, both seeking to refine decision making around merger opportunities.

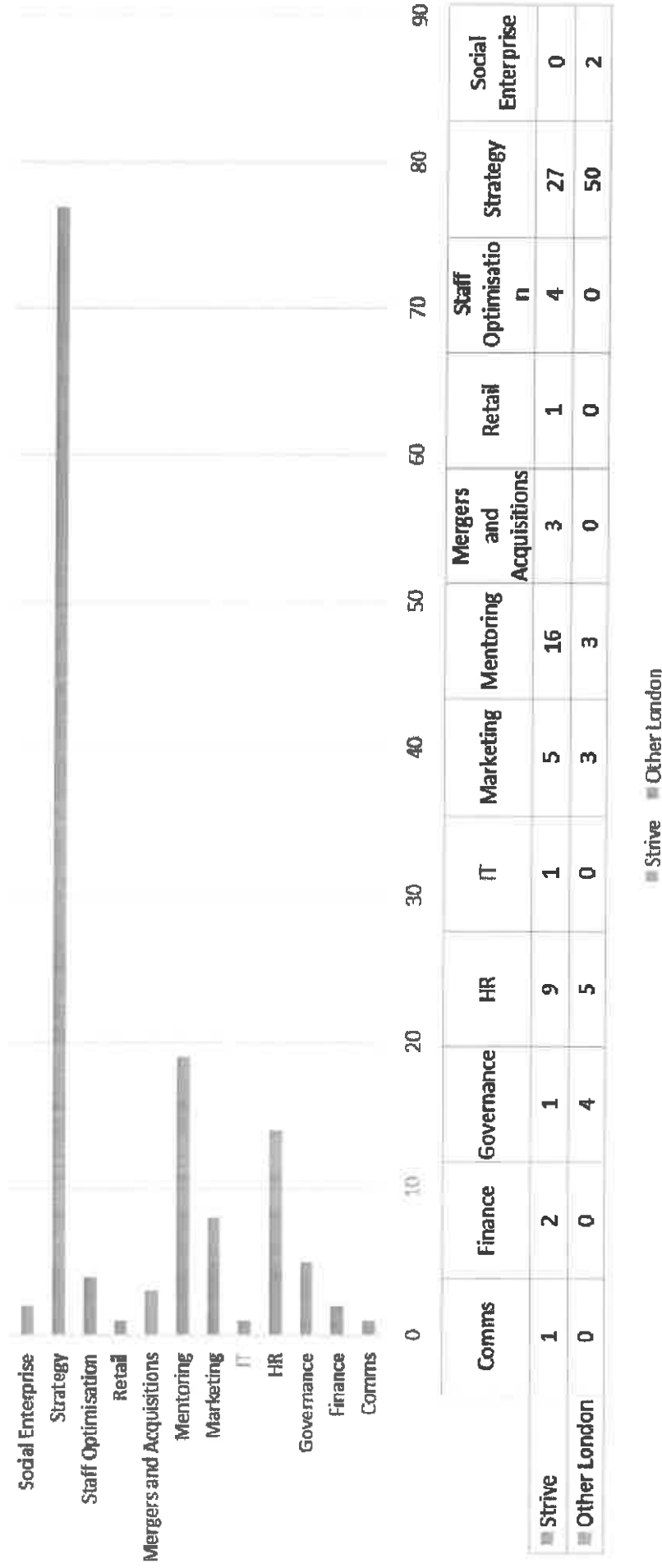
Since the December 2017 report a new project type has arisen. **Staff Optimisation** which aims to improve processes and structures increasing efficiencies and effectiveness. There have been four new Staff Optimisation projects which are all STRIVE projects, of these organisations all have sought to undergo organisation reviews to improve effectiveness.

STRIVE PROGRAMME REPORT

28 June 2018



All London Projects by Type: Strive projects within London Total



'Other London' includes 25 STRIVE outreach projects

STRIVE PROGRAMME REPORT

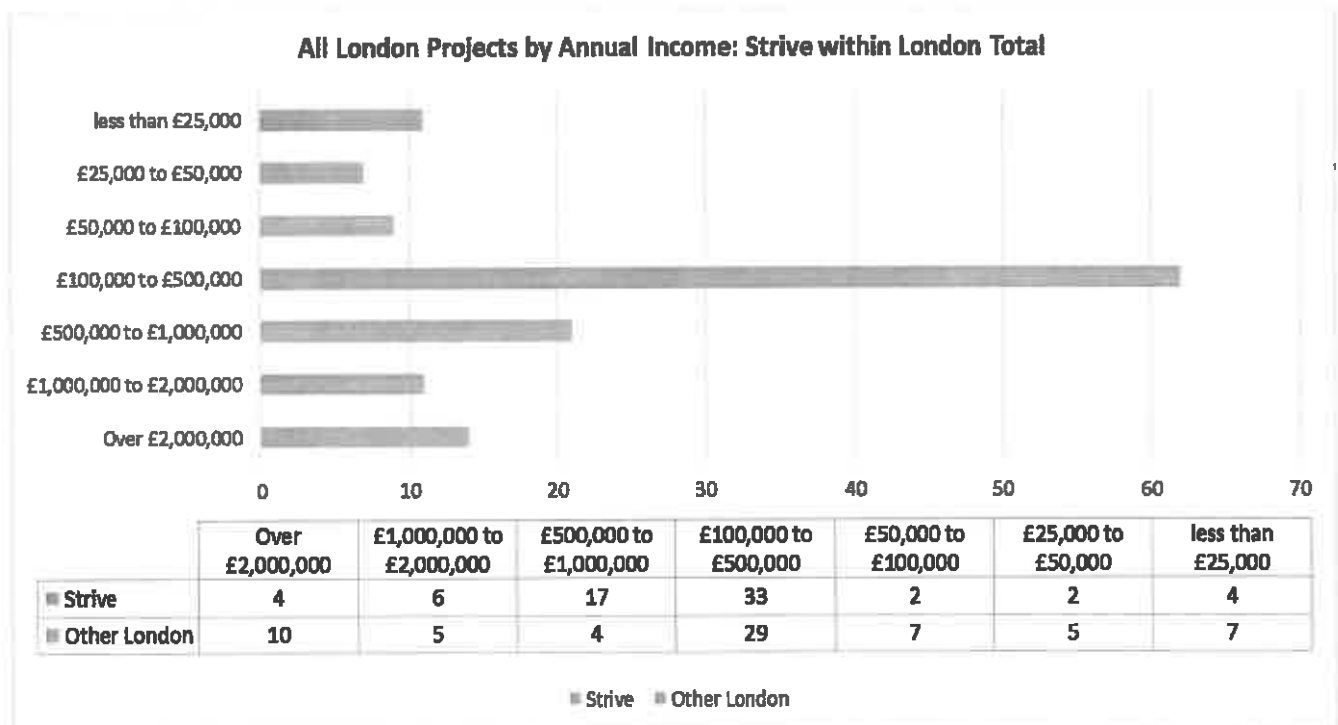
28 June 2018



2.2 Annual Income Comparison

In London, the financial size of all the organisations The Cranfield Trust works with ranges from under £25k to over £2m. Comparing all London projects against STRIVE projects, the following analysis has been drawn.

- **Nearly half of all STRIVE projects are within the £100k to £500k bracket:**
- 47% of STRIVE Projects are in the £100-£500k range, similar to the average London project at 45%.
- 24% of STRIVE projects are working with charities within the £500k-£1m range where the London average is 15%.
- 14% of STRIVE projects are with charities with over £1m turnover with the London average being 18%.
- The London average of 8% of charities being under £25k in size, is similar to STRIVE projects at 6%.
- Overall, STRIVE projects are largely with medium sized charities (with an annual turnover between 100k to £1m) with 71% of projects in this bracket. As highlighted in the December report, mentoring projects are still more requested by the financially bigger organisations however this has balanced a little with more medium sized charities requesting projects recently. All but one mentoring project is with charities with income of £100k and above.



STRIVE PROGRAMME REPORT

28 June 2018



2.3 Borough Base Comparison

The Trust's London projects span all 33 London boroughs, the STRIVE projects cover 21 London boroughs. Five projects are London wide. **The highest concentration of work is in North London in the boroughs of Camden, Islington and Haringey.**

Combined, STRIVE has 21% of projects in the boroughs of Camden and Islington, the London wide total is 23%. The next highest for STRIVE projects is Tower Hamlets with 10%, then Wandsworth at 9%. There is an increasing number of STRIVE projects in North London, adding Haringey to Camden and Islington; takes the total for these three boroughs to 24% of STRIVE Projects.

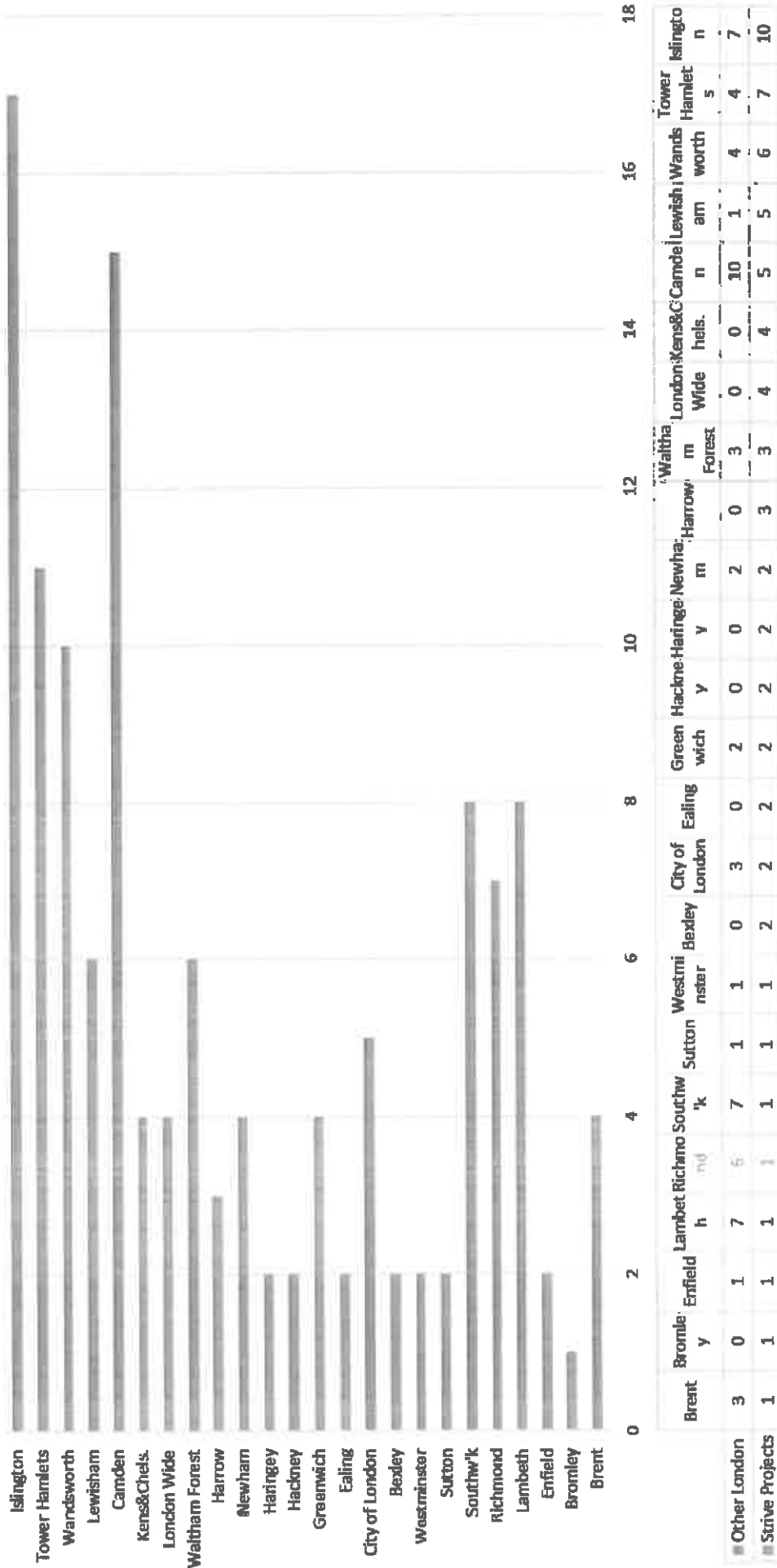
After this, there is a relatively even spread of projects with West London having slightly higher numbers. There have been no STRIVE Projects in Waltham Forest, Redbridge, Merton, Kingston, Hillingdon, Hackney, Croydon, Hammersmith and Fulham, and Barnet although we have had other London projects in these boroughs.

STRIVE PROGRAMME REPORT

28 June 2018



All Projects by Borough Base: Strive within London Total



Other London Strive Projects

STRIVE PROGRAMME REPORT

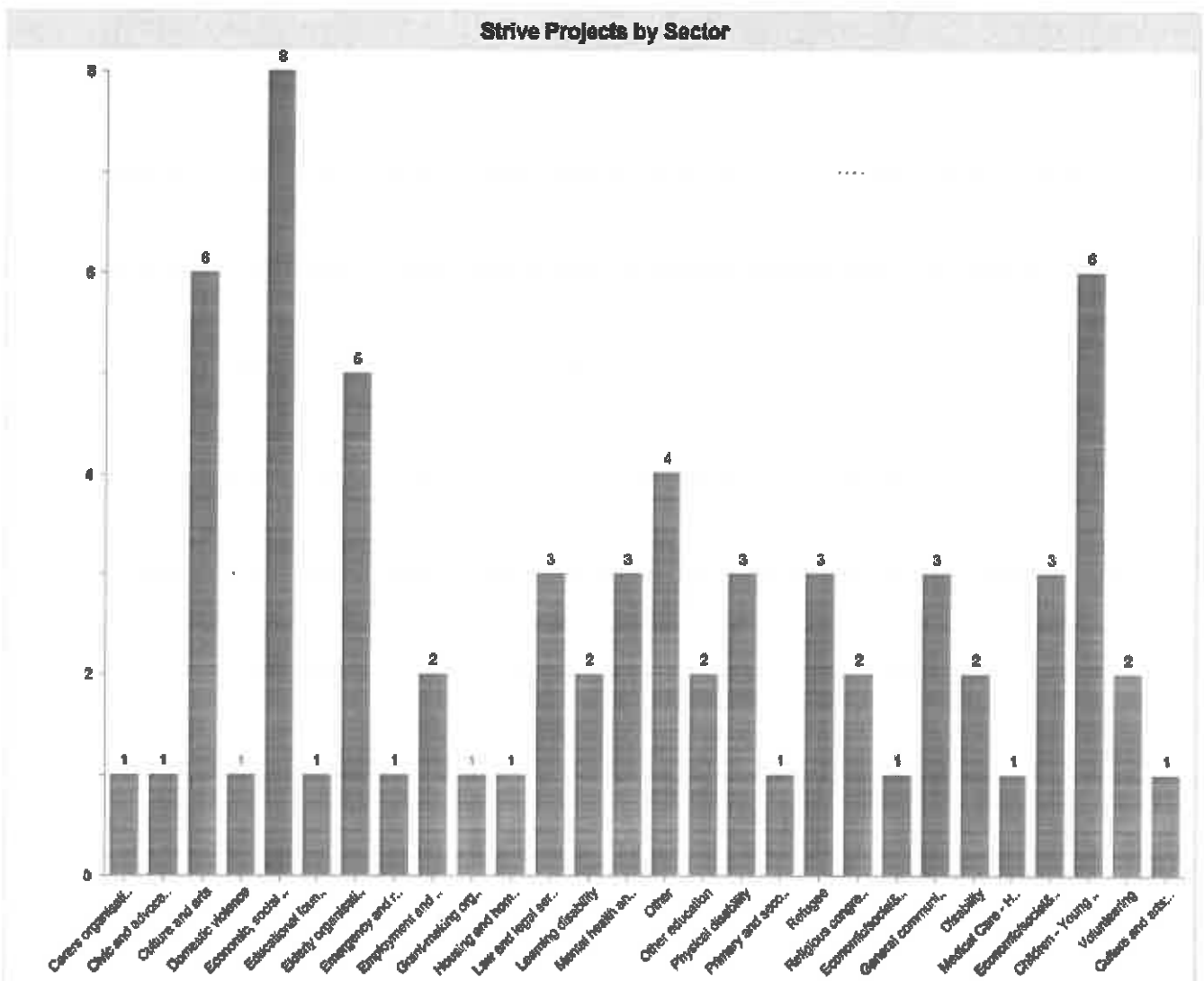
28 June 2018



2.4 STRIVE Project Analysis

A look at the charities by sector indicates that four sectors make up over 35% of the projects. These are:

- Economic, Social & Community Development
- Culture & Arts
- Children & Young People
- Older People's Organisations



STRIVE PROGRAMME REPORT

28 June 2018

As outlined on p6-7, demand is greatest for strategy support and mentoring. Considering 47% of respondents to the Cranfield Trust Funder Plus survey cited Financial Sustainability as their greatest challenge it is positive, on one hand, that these organisations are thinking strategically towards a sustainable future but on the other it is disappointing not to see them reaching out to the Trust for financial planning support.

The Trust sees this as a significant opportunity and will look at ways to potentially market another package of services around financial management and forecasting, and to help charities improve the information they use for fundraising.

