

achieve more

performance hub newsletter

issue #2

spring 06

Thinking ahead

How strategic planning can help you **p. 8**

How to run a stakeholder consultation workshop **p. 12**



performance hub



performance hub

The Performance Hub works to help voluntary and community organisations (VCOs) achieve more.

Vision

The Performance Hub's vision is of voluntary and community organisations having a positive impact upon the lives of millions because they are performing excellently.

Aims

The Hub's aim is to enable VCOs to better achieve their mission by placing performance improvement at the heart of the Voluntary and Community Sector (VCS).

Four specific aims contribute to this overall aim:

1. to increase VCOs' understanding of and ability to use performance improvement approaches;
2. to enable local, sub-regional, regional and national infrastructure to better support VCOs in performance improvement;
3. to increase the relevance and effectiveness of the knowledge base about performance improvement available to VCOs, and
4. to create a more supportive external environment around performance improvement for VCOs.

For more information see our website at www.performancehub.org.uk

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www.voluntarysectorskills.org.uk

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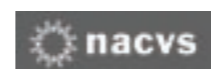
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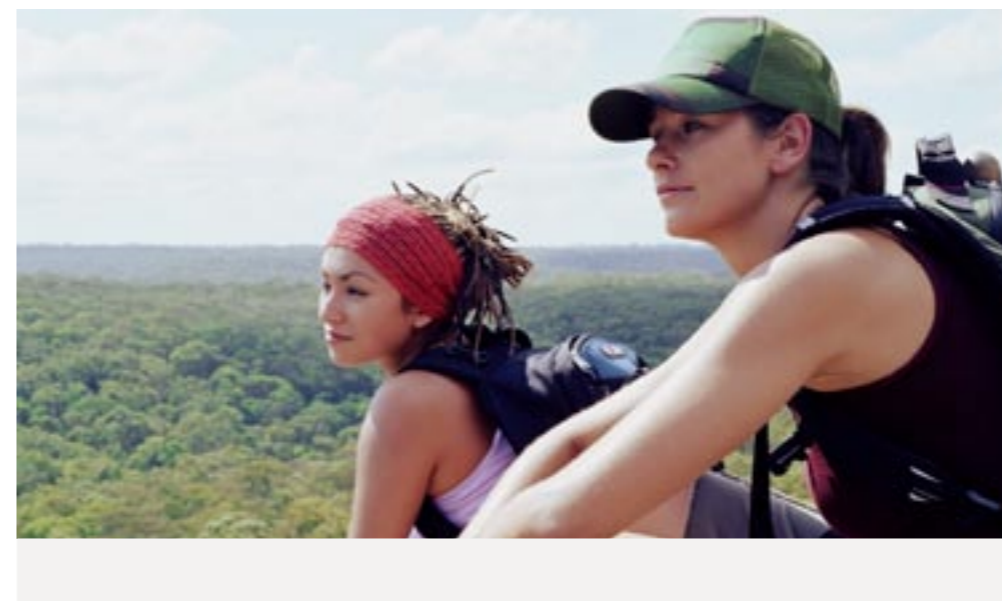
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achieve more

performance hub newsletter



WELCOME

This second edition comes at an exciting time for the Performance Hub, as we leap into Spring 2006 with a number of new services, such as our website, a suite of support services for infrastructure and our free phone helpline.

One of the Hub's key topic areas is 'thinking and planning strategically'. Most of us have been told at one time or another to 'be more strategic'. But what does this mean in the real world? As the Hub develops its work programme on strategy, this issue introduces the topic, provides a case study and offers suggestions of where to go to find out more.

We received an overwhelming response to our first issue with hundreds of you giving valuable feedback or signing up to our Active Network. We were pleased

to know that 84% of you thought the first issue was good or very good. We'll be working very hard to maintain or improve on this.

Whilst most people found the newsletter very clear, a few of you found the information too basic. Our main focus in this newsletter is to make performance issues accessible to busy managers with little time or few resources and who are perhaps new to performance. More in-depth information will be available on our interactive website from April 2006 and we continue to welcome your comments and insight. If you know of a useful resource, please tell us so we can let others know.

Please continue to send your news, feedback, and details of events and publications to me at editor@performancehub.org.uk.

Julie Pottinger
Achieve More Editor

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HELPLINE

It's good to talk

The Performance Hub free phone helpline will be ready to take your calls from 3rd April. The first helpline in England dedicated to performance improvement in the voluntary sector will offer general information on performance improvement and advise on further sources of support. **Our advisers will be available Monday to Friday, 8am–6pm 0800 652 5787**

WORKSHOP

Making your money do more

A workshop for funders

The Performance Hub is holding a free half-day workshop for funders to explore how they can help their money go further by supporting performance improvement in the organisations they fund. The workshop will provide an opportunity for funders to share learning and network.

London, Thursday 6th April

Contact Jake Eliot

020 7520 2508

✉ jake.eliot@ncvo-vol.org.uk

SUPPORT

Shout about success

Compass Partnership is working with groups of three to five national charities to help them articulate the difference they make. The programme runs for 12 months and enables organisations to challenge and learn from each other.

Contact Debbie Emerson

01628 478561

www.compasspartnership.co.uk

WEBSITE

Home | [About us](#) | [Contacts](#) | [News and events](#) | [Publications](#) | [Sign up](#)

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performance hub

Learn more Services and support

improving performance quality think ahead track progress share learning

Want to achieve more?
Are you from a Voluntary and Community Organisation (VCO) and want to improve performance?
This site provides help and resources.

Get started

"Being able to show that we get the job done means we have won funding for three more years."

Grace, Black Participation Project, Birmingham

Welcome
We are one of six national hubs of expertise devoted to helping voluntary and community organisations (VCOs).

Common questions
How can we win more funding?
Funders want to fund organisations that are committed to achieving their outcomes. If you

bassac
BTEG
charities

coming soon: www.performancehub.org.uk

New Performance Hub website

The Performance Hub's new website is set to launch in early April and will offer a range of useful services for voluntary, community and social enterprise organisations, including information, support and opportunities for interaction and feedback.

The 'Learn more' section offers practical information on ways to achieve more for

your cause. Topics addressed include strategic planning, quality, monitoring and evaluation and benchmarking, alongside articles explaining the importance of performance improvement. A number of case studies provide real-life examples of some of the key concepts being put into effect.

For people wishing to explore further, the site also offers details of some of the best publications on performance-related topics and signposts you to key downloads and worthwhile resources on other sites.

The section called 'Services and support' offers information on how to get or give direct support. Here people looking for support and advice on performance will find contact details both locally and nationally, while people who offer support can find out about the Performance Hub's 'mentors' scheme and free training opportunities.

The site provides plenty of opportunities for you to interact with the Hub and provide feedback. A feature called 'Your questions' enables you to post questions

of interest and also review questions posed by others.

Many of the pages have a feature which allows you to offer your own comments on the issues being discussed.

If you find the site helpful, we'd strongly recommend that you join our Active Network online to receive our regular electronic newsletter, which will keep you updated on key developments with the Hub, as well as alert you to important events and valuable new information as it becomes available.

SOFTWARE

Performance tool

Social Firms UK has launched a new practical performance management tool. The 'Performance Dashboard' is based on the Balanced Scorecard and enables social firms to monitor and report on their progress. The Dashboard is available as a CD-ROM and costs £90 for non-members.

Contact Mark Daly

01737 764021

✉ info@socialfirms.co.uk

[www.socialfirms.co.uk/index.php/](http://www.socialfirms.co.uk/index.php/Section107.html)

Section107.html

MANAGEMENT

Charity talks 2006

The Centre for Charity Effectiveness at CASS Business School in London is holding a series of talks on key management issues. The next talk on 24 May is on 'Expanding while keeping your organisation lean and focused'. There is a talk on delivering strategic change on 4 October.

Contact Karen Hickox

020 7040 8781

✉ k.hickox@city.ac.uk

www.centreforcharityeffectiveness.org

MARKETING

ImpACT Coalition

Since its launch in July 2005, the Coalition has worked to increase public understanding of charities' work. Over 50 top charities have now signed up, including Cancer Research UK, Oxfam and Shelter.

Contact Campbell Robb

020 7713 6161

✉ campbell.robb@ncvo-vol.org.uk

www.ncvo-vol.org.uk/accountability

Services for support workers

The Performance Hub is launching a suite of services targeted at those who give, or would like to give, support and advice to frontline voluntary, community and social enterprise organisations (VCOs).

Many organisations value one-to-one support, a service that is currently offered by a range of infrastructure organisations. But not all VCOs have access to the services they need. At the same time, many development workers are interested in updating their skills and sharing their knowledge with peers.

The Hub is working to address these needs. From May 2006, it will offer free services for 'performance mentors'. This includes training on performance improvement, peer networking and mentoring support.

The Hub is piloting its training courses in April across England's nine regions. These courses will be suitable for those new to the subject, as well as experienced practitioners who want to update their knowledge or exchange ideas. They will give a thorough grounding in performance improvement approaches and guidance on explaining the concepts to others.

Six different modules will be available: Quality, Benchmarking, Monitoring and Evaluation, Outcomes, Strategic Planning and a core module, which will draw these themes together. Each module will run at least once in each region over the next year and there will be 16 places on each course.

Sign up through the website
www.performancehub.org.uk
or contact us
 ☎ 020 7713 5722
mentors@performancehub.org.uk

Getting Support with Strategy

Chief Executives of small organisations are often so tied up with operational problems that they don't have time for strategy. Julie Pottinger talks to Lisa Shrevel, Sustainable Development Manager at bassac, about current initiatives for helping small organisations find the time—and space—to think.

Finding time

Lisa believes that many small voluntary and community organisations realise the value of thinking ahead. Strategy can make your organisation more effective and, importantly, more sustainable. The problem is finding the time: "Most organisations know that if they could commit more time to strategic planning, they could deliver better services and become more sustainable."

She argues that they need to find time to think and reflect on the future of their organisations, which is why bassac runs a number of initiatives to help them do that.

Pooling resources

One way small organisations can free up more time is by sharing back office functions, such as IT and HR. bassac is currently piloting a programme called SWiM (Sharing Without Merging) which helps organisations do this. A similar service is being offered by NCVO's Collaborative Working Unit, which provides advice to voluntary organisations wanting to share resources.

An extra pair of hands

A skilled extra person providing cover for a limited period can allow senior staff to get away to think about strategy. bassac is developing a bank of community sector experts who are able to offer extra capacity and expertise when organisations are facing significant change or crisis.

Strategic Review Programme

bassac is also piloting a structured Strategic Review programme which promotes shared learning between

organisations. This starts with a joint workshop for the chief executives and chairs of around ten organisations. Participants explore what strategic review means for them and what the key stages are. Each organisation then prepares an outline of their approach, tailored to their needs.

After three to six months, during which time bassac offers one-to-one support, the whole group meets again to review progress and identify any key issues arising.

"Participants value the time the programme gives them to reflect on their organisation, network with and learn from others", Lisa explains.

Building financial capacity

For many voluntary and community organisations, a reliance on short-term funding encourages short-term thinking. Like a number of infrastructure agencies, bassac offers advice to organisations on how to build their financial capacity through diversifying income, developing sustainable funding streams and recovering the real costs of their activities.

Making it happen

Once you have taken the time to think, it's time to take action. Lisa stresses the importance of putting the plan into effect: "You can strategically plan until the cows come home, but making it a reality is what really matters."

"A skilled extra person providing cover for a limited period can allow senior staff to get away to think about strategy."

Further information

Support from an infrastructure agency can make a big difference to your success, especially if 'strategy' is new to your organisation. There are many agencies willing and able to help, and the Performance Hub website, which will be live from April 2006 at www.performancehub.org.uk, has contact details for many of them.

bassac

bassac supports its members in order to improve the lives of local communities. Its members are community based multi-purpose organisations that provide a range of services and support, tailored to meet the needs of local people. bassac offers a range of development support including:

- ◆ Support with strategic review
- ◆ Annual reviews to map progress and identify development needs
- ◆ Specialist organisational development services

Contact bassac
 33 Corsham Street London N1 6DR
 ☎ 0845 241 0375
 ✉ info@bassac.org.uk

bassac is one of the Performance Hub's partners.

NCVO's Collaborative Working Unit

The NCVO's Collaborative Working Unit offers advice to voluntary organisations working together, including sharing back office functions.

Contact Isobel Booth
 ☎ 020 7520 2441
 ✉ collaborate@ncvo-vol.org.uk
www.ncvo-vol.org.uk/collaborate

If your organisation offers support to voluntary, community or social enterprise organisations on performance improvement, please tell us.

Thinking Ahead

What does the word 'strategy' mean to you? To many people, strategy is something for large government departments, multi-million pound private companies and army generals.

Some people assume that strategy means heavy, high level plans written by and for senior management. But there is more to strategy than just a plan. Your strategy can be in your head. It is a set of principles and assumptions about why your organisation exists, what it hopes to achieve and how it hopes to achieve it. Being strategic involves thinking about how your organisation interacts with its external environment and adapts to changing circumstances.

It can be helpful to consider strategy in terms of three simultaneous processes: thinking, planning and implementing.

Thinking

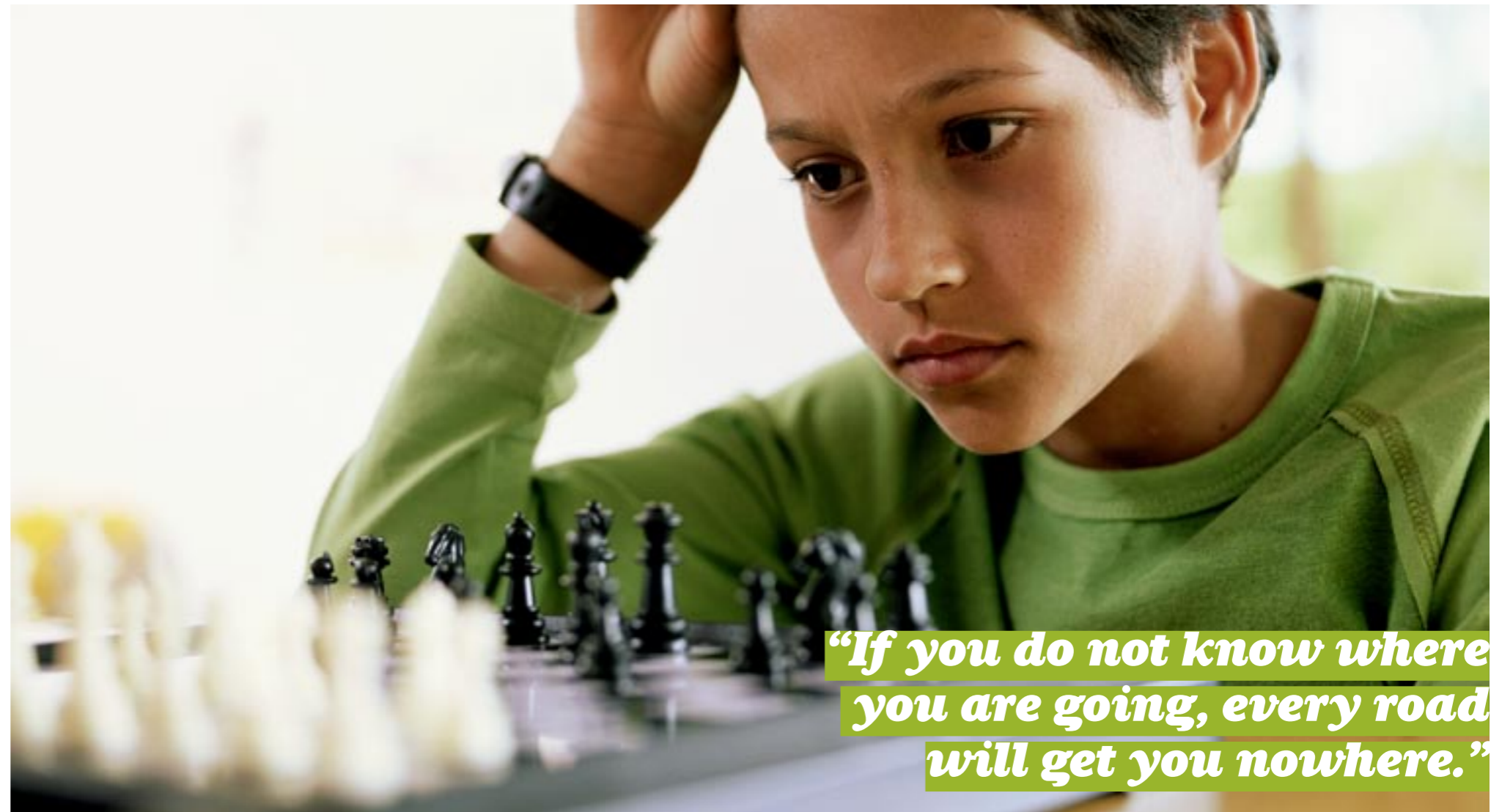
Strategic thinking is a skill that is relevant to everyone in your organisation. You can apply strategic thinking every day, not just when drafting a plan or writing a funding bid. Strategic thinking can involve:

- ◆ Seeing the big picture and understanding your organisational mission in your own terms
- ◆ Thinking about the medium to long-term
- ◆ Identifying the people who have a stake in your organisation, and what they want to see your organisation achieve
- ◆ Considering the changing environment, and how your organisation should adapt to it

Thinking strategically is an active and challenging experience and can be empowering. Putting an emphasis on thinking about strategy will affect how your plans are put together and put into practice.

“A goal without a plan is just a wish.”

Antoine de Saint-Exupéry



“If you do not know where you are going, every road will get you nowhere.”

Henry Kissinger

Top tips on strategic thinking

Make time and space

Find the place where you think most clearly. Whether on a bus, in the bath, or your favourite park bench, try and safeguard some spare time every week to think about where your organisation is in relation to your long-term goals and the needs of your users.

Know what you need to know

Conduct a mini-audit of information you need to make the big decisions. What do you need and where can

you get the information? Can your funders provide you with data on broad trends and guidance on any relevant new legislation? Could you share information with other organisations?

Two heads are better than one

Your organisation is likely to be brimming over with experience and expertise, so ask around. Discussing the direction of the whole organisation with other staff can bring in fresh perspectives and help you test out ideas.

Planning

Planning helps you define where you want your organisation to go, and how it will get there, over the next three to five years. It will also help you think about the resources you have available, and how best to use them. To make sure your plan is relevant and focused on your users or cause, you should consider engaging in strategic conversations with staff, users and others who are affected by the organisation. You will also need to think about the external environment—likely changes, opportunities and challenges—and plan ways of handling these. Your discussions should end in decision and once you have agreed on a course of action, write it down and communicate it widely.

Implementing

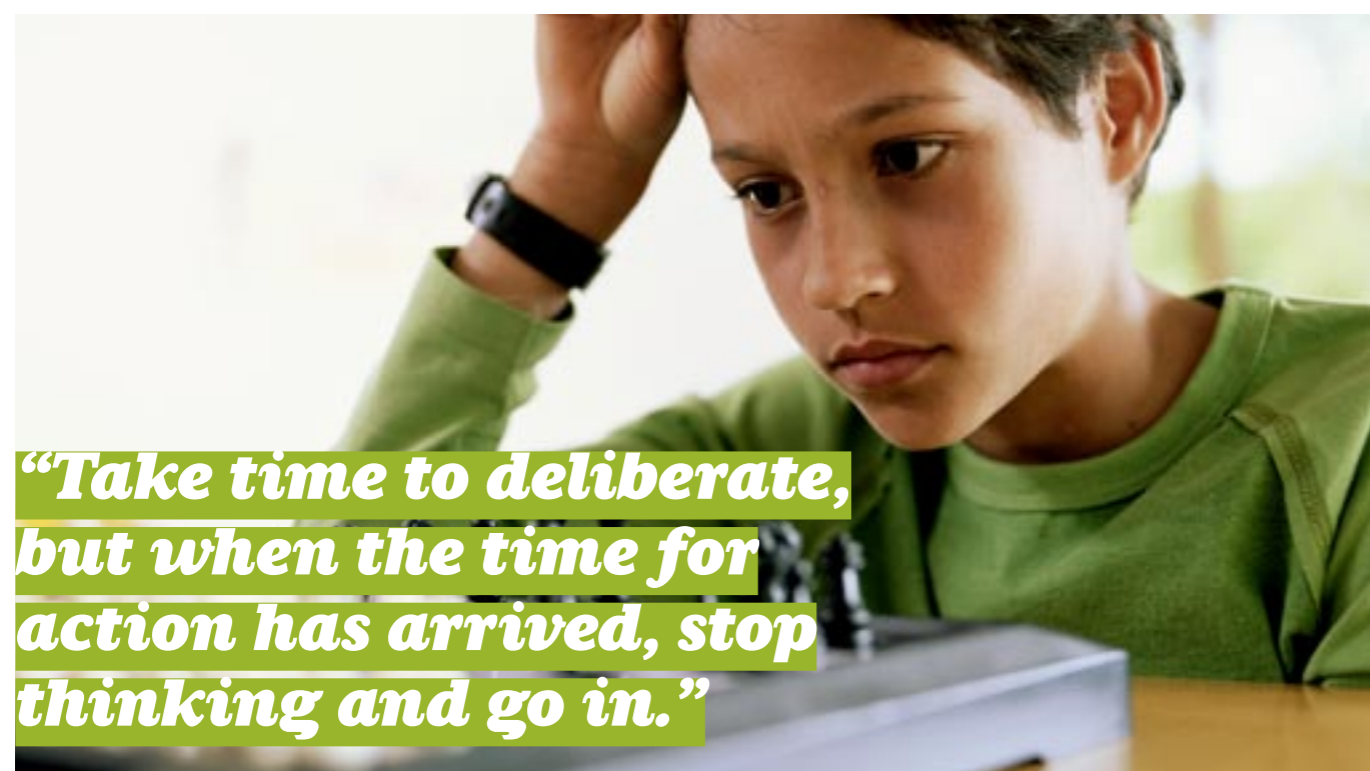
Putting your strategy into practice requires your whole organisation to translate high-level principle into everyday decisions and priorities. This means that all staff (and

volunteers) need to understand and accept the strategy so they can play a part in bringing it to life. This is easier if you have given them a role in developing the strategy, and if you communicate the strategy to them clearly, frequently and consistently. Encourage and support staff to weave the strategic plan into their current work programmes, rather than seeing it as a separate add-on activity.

Adapt your plan to changing circumstances over time. The manager who insists on sticking to the plan, even when everything else has changed, risks making a big mistake. Meetings and away days are a great opportunity to review priorities and challenge assumptions, keeping the strategy alive.

Thinking, planning and implementing are interdependent. You can't start writing a plan without thinking about what your organisation wants to achieve, and there's no point in agreeing a plan before you've considered how it's going to be taken off the page and turned into action. All these elements need to be fused together to ensure you have an effective strategy that will help your organisation succeed over the years to come.

Jake Eliot
Development and Policy Officer
at the Performance Hub



“Take time to deliberate, but when the time for action has arrived, stop thinking and go in.”

Napoleon Bonaparte

Further information

NCVO's Third Sector Foresight project

Provides information on strategic planning, detailing trends affecting the voluntary and community sector.

Contact Megan Griffith

020 7520 2483

megan.griffith@ncvo-vol.org.uk

www.ncvo-vol.org.uk/3s4

Tools for Tomorrow — A practical guide to strategic planning for voluntary organisations

This toolkit gives an overview of different planning models and looks at the possible impact of external factors.

Price £35.00 (£24.50 NCVO members)

<http://shop.ncvo-vol.org.uk/main.asp>

0800 2798 798

Performance Hub website

See also the *Think Ahead* section, available from April 2006. www.performancehub.org.uk



Art of strategy

Strategy meetings can be such a dry affair! They always seem to start with a PEST, move onto a SWOT and somewhere in between review the KPIs. Then, while participants relocate to the nearest pub for some real conversation, the facilitator carts off a small forest of flipchart paper which, typed and formatted, re-emerges six months later as a glossy brochure: the strategic plan!

Surely there's more to developing a strategy than discussing management frameworks? Yes, management tools and indicators can help identify issues. But to join these disparate fragments of information and call it a strategy is like framing a child's dot to dot and calling it art.

Charities, community organisations and social enterprises are born out of a great idea. They have at their heart a determination to change things for the better and meet an identified need. It's this passion and vision that delivers effective outcomes for our causes. It's this energy which attracts committed staff and volunteers, and which inspires confidence from our

funders and partner organisations.

Commercial companies would love to engender this kind of passion across their customers, staff and shareholders. Indeed, it seems that whilst in the charity world some of us are becoming more obsessed with bottom line performance measures, the commercial world is waking up to the fact that there is more to running a successful organisation than watching the indicators, counting the widgets and adjusting the dials.

Strategy is a skilful balancing of different perspectives. It blends different ideas and agendas to create a movement. It's not 'painting by numbers', with a fixed method and predictable result. It's a bold and creative work of art, alive with the colour and potential to inspire shared action.

So, we should not allow ourselves to be intimidated and constricted by management tools and KPIs. Our strategies should be grounded in the vision and passion, which reflects the true spirit of our organisations. KPIs, tools, and frameworks must be slaves to your own passion, not your master.

Stella Smith,
Independent Consultant
✉ stella.smith@solitas.co.uk

“There is more to running a successful organisation than watching the indicators, counting the widgets and adjusting the dials”

Some strategy terms

PEST a simple framework to analyse factors in the external environment under the headings of Political, Environmental, Social and Technological.

SWOT a simple framework to analyse an organisation's strengths and weaknesses and to identify external opportunities and threats.

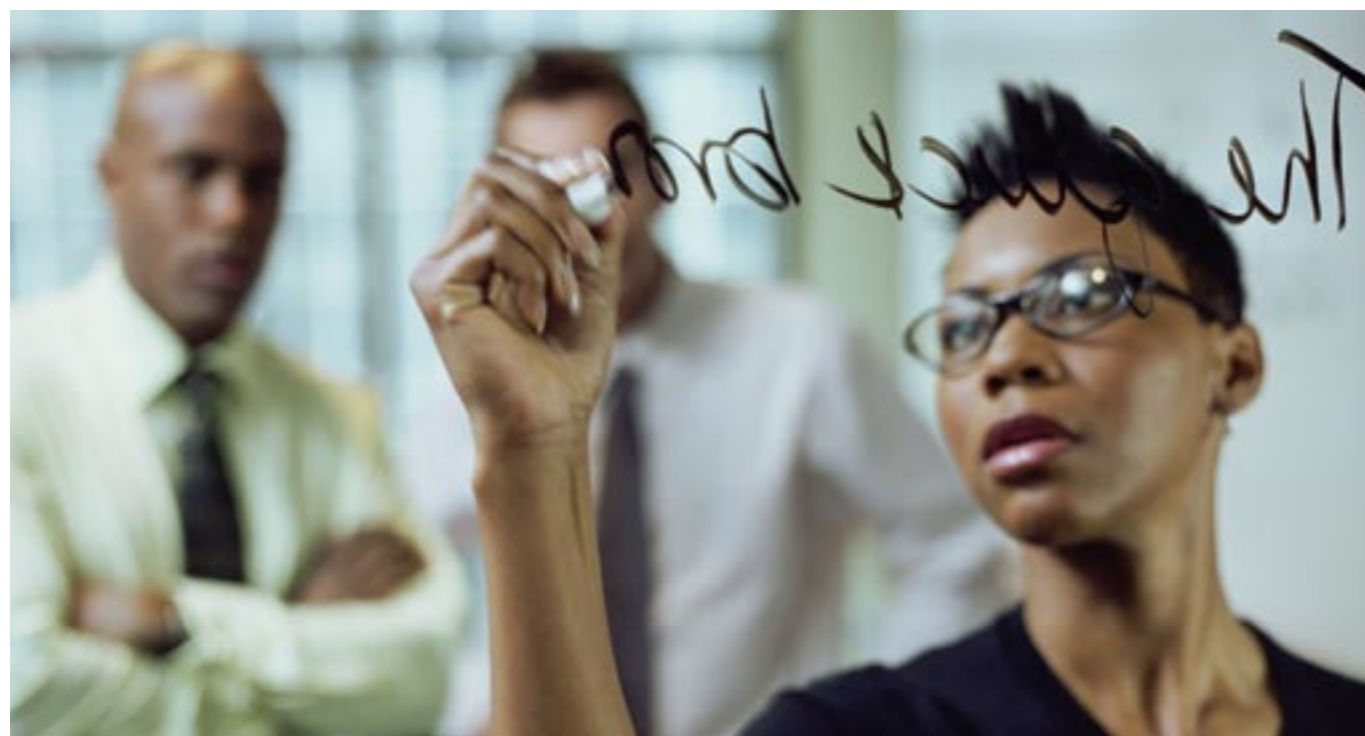
KPIs Key Performance Indicators: pieces of information that senior managers believe to be the key indicators of the organisation's performance.

The views in 'opinion piece' are not necessarily those of the Performance Hub or its partners.

Strategies work best when they incorporate the diverse views of different stakeholders. Stakeholders are the people, groups or organisations who are interested in or affected by your organisation or project. By involving different people in the development of your strategy, you will also find it easier to get them to accept and deliver it.

You can consult your stakeholders through surveys or interviews, but running a workshop is a great way to bring a range of stakeholders together in one room, and to encourage a freer discussion. This article offers some ideas on to how to make this event a success.

How to...



...run a stakeholder workshop

“some funders, such as Awards for All, may be willing to fund the event for you.”

Plan

Know your stakeholders

Make a list of your stakeholders and their particular interests.

They will typically include:

internal stakeholders, such as staff, volunteers and trustees; and

external stakeholders, such as your users or beneficiaries, funders, donors and sponsors, local and central government, the media, and the local community.

Keep stakeholders in the know

Think about your stakeholders and how you communicate with them from the beginning of your project.

What do you want them to know and when? By building good relationships with your stakeholders early on, they will be more likely to participate later.

Know your aims

Think about why you are running the workshop. Is it to gather information? If so, ask yourself what you actually want to know and what you will do with the information gathered. Or do you want to bring people together? If so, be clear what you hope to achieve from this.

How many workshops?

One option is to run different workshops for different stakeholder groups. This is helpful where you feel different stakeholder groups may tend towards strong conflict with each other. However, a single workshop with a diverse participant group often stimulates more ideas.

Resourcing it

Ideally you will already have included the cost of your workshops in your budget. If not, some funders, such as Awards for All, may be willing to fund the event for you. You may also be able to negotiate sponsorship or donations.

If you lack capacity to organise the event, consider hiring an event organising agency or temporary staff. Alternatively, you could contact your local volunteer centre to recruit a suitable volunteer.

Practicalities

Set the date as far in advance as possible, consulting with stakeholder groups as appropriate.

Select a convenient and comfortable venue and book well in advance. Think about the size and layout of the room appropriate for your workshop and make sure the venue has good catering.

Once the date is set, invite the participants, explaining the purpose of the event. Remember to collect details of any dietary or access requirements. According to the needs of your participants you may need to hire interpreters or translators.

Make sure you have adequate staffing on the day. You will probably need a presenter or facilitator and staff to meet and greet and take notes.

On the day

Be sure to explain again the purpose of the day, and what is coming up. This reduces any confusion or anxiety and gets people thinking in advance.

A variety of exercises will help to ensure that you consider everyone's views. One idea is to get people to write their comments on a topic onto post-it notes and stick them onto a flip chart pad. Participants then group them into themes and prioritise them.

Another is to set a scenario such as: "It is three years time and your organisation is having a party. What are you celebrating? Where is it? Who is there? What are they eating and drinking? What are they talking about?" Once the participants have set their scene, encourage them to imagine how the organisation got there. This exercise creates both a vision and a plan of how to achieve it.

Using the information

Once the notes of the event have been written up, find someone who can analyse the information. You should have some very rich qualitative data so review this to identify common themes and trends.

“A generous supply of good food and drink will go a long way to improving the mood of your participants on the day!”

You may want to produce some sort of official record of the event. This could simply be a list of participants (if they have given their permission) and basic notes covering the main points made and any suggestions for action. You could circulate a draft copy of the notes to participants for their comments before finalising it.

Finally, consider circulating the final report to both stakeholders who attended, and those who couldn't. The former will enjoy realising that their views are being heard and the latter may be prompted to offer some input.

Chris Ramsbottom
Independent Consultant
Pandora's Box Training

Further information

Ideas for activities:
www.managementhelp.org
www.businessballs.com

Help with funding:
Awards for All
www.awardsforall.org.uk/
Your local Community
Foundation www.dta.org.uk

Planning for success

What does strategic planning really involve? What are some of the difficulties and what makes it a success? Julie Pottinger talks to the director of a community organisation in South London to find out.

When Clare Gilhooly took up her new post as Director of Cambridge House in 2004, it had a waiting list for its services and was unable to meet growing demand.

A voluntary organisation based in Southwark, Cambridge House works to alleviate the effects of local poverty and supports initiatives that focus on achieving social change. At the heart of the service is a community building that is available for hire by local groups, and its 84-strong staff team offers a range of services such as life skills workshops for young people and advocacy for people with mental health needs.

Prior to Clare's arrival, Cambridge House had undertaken a review of its vision, values and purpose, and was in the process of reorganising its management structure. But the Trustees felt there was a need for further strategic review to help meet the challenge of increasing demand.

Clare decided to seek support from bassac, a membership organisation offering support to multi-purpose community organisations:

“We hadn't done something on this scale before... If you read the literature [a strategic review] can seem like such a big process and you don't know where to start.”

An added advantage of the external involvement was that it enabled Clare to participate equally in the process alongside other staff.

Getting started: the away day

At an away day in June 2004, the new senior management team and the trustees reviewed Cambridge House's services and future aims. They identified key areas for improvement, which were presented to staff the following month. With staff involvement, they determined six key aims, which they planned to achieve by March 2008.

The organisation decided to play to its strengths in advice and advocacy services. It would also focus on creative projects for people with learning disabilities; expand its services to young people; develop its role as a voice for the local community; improve internal and external communications; and update the management and financial systems.

Detailed planning: working groups

Six working groups were set up to flesh out the details of each one of the aims and, once they had done their work, they joined forces in October to discuss and combine their findings. A final 16-page strategic plan was produced in January 2005.

Communicating the plan

A professionally designed 4-page executive summary of the plan was sent to members, funders, and senior council officers. Clare argues that the investment in design was worthwhile: “Voluntary organisations don't usually produce glossy things...but we realised that it would give us a much more professional image with funders.”

Implementation and review

Management and staff are now designing each team's work programme to include one or two of the aims. Clare also intends to update the strategic plan every year.

“Our plan isn't perfect, but I've realised that you should do the bits that are achievable for you at the time.”

In September 2005, Clare ran a half-day session with trustees to review how the plan's implementation was going.

“It was reassuring to find that about 80% of the first-year goals had been achieved within six months.”

Benefits

As a result of its strategic review, Cambridge House has developed a Time Bank, a Residential Care Advocacy Service, expanded into Community Care Law, created two new services for people with learning disabilities and increased the capacity of their Play and Respite Care Scheme. It has also developed a ground

breaking Tolerance and Diversity project with young people. Further, the organisation now focuses more on user involvement and holds more frequent events designed to involve staff in the organisation's future.

Reflecting on the process, Clare is pleased so many people took part and signed up to the same direction. “It has helped us to grow and we're all clearer about where we're going.” She feels that the support they received from bassac was vital to the success of the process. The organisation facilitated meetings, offered phone support and commented on drafts of the plan. As Clare explains,

“It was having an external person that made the difference. A critical friend will say some painful things you need to hear in a way you can handle it.”

Lessons learned

These are the key lessons Clare feels she learned from the experience:

1. Get an external partner involved who can play the role of 'critical friend'
2. Make sure someone internal drives the process
3. Don't do it all yourself—set up one or more working groups
4. Communicate your plan to your stakeholders
5. Get the support of your trustees
6. Set a date to review progress
7. Be realistic—just do what you can!



Events

April

- 3rd * **Blended value and social investment**
New ways of thinking about VCS funding: This seminar will explore changes in grant making and philanthropy as grant givers become more engaged in organisations' outcomes and the challenges of measuring and demonstrating impact.
- 4th * **Business Planning**
Are you responsible for producing a business plan? This session explores methods and processes to get to a written plan.
- 6th * **ChangeUp, Up and Away**
Showcasing ChangeUp in Yorkshire and the Humber: Simon Hebditch, Chief Executive of Capacity Builders, will talk about the future of ChangeUp and VCS infrastructure development.

June

- 19th * **Strategic Management**
How to improve your organisation's effectiveness through strategic thinking and action.

Venues

- * **Blended value and social investment**
Third Sector Foresight (NCVO)
London 3–5pm
✉ research@ncvo-vol.org.uk
- * **Business Planning**
The Priory Street Centre, York
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☎ 01904 789918
✉ lynnliddle@gmail.com
- * **ChangeUp, Up and Away**
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Contact Jenny McGuire
☎ 0113 394 2300
jenny.mcguire@regionalforum.org.uk
- * **Strategic Management**
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