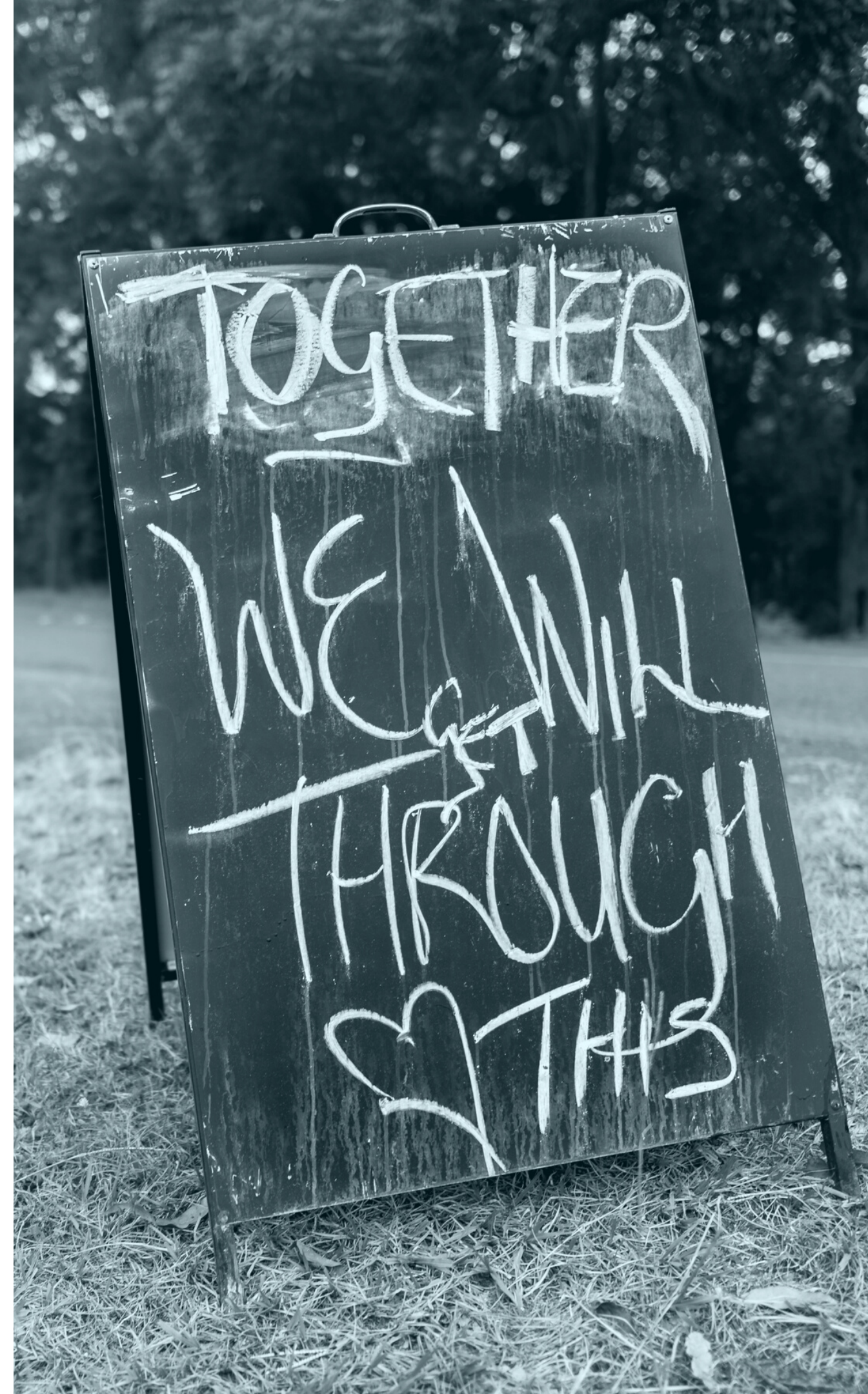




# ONE YEAR ON: Leading and managing through dramatic change

May 2021



# Introduction



Since lockdown in March 2020, all our lives and working landscapes in the voluntary sector have changed enormously. At Cranfield Trust, along with everyone else, we've been through a year of rapid change and development. This report looks back at the year, and asks what we should expect next in terms of management challenges for small to medium size charities.

To prepare the report, we collected information from across our network, informally through our staff team, and through a survey focused on management skills and challenges.

We found a mix of experiences, views and emotions – positive and negative – which were in line with our own experience of working with over 600 charities in the last twelve months.

Strategic thinking and planning ahead was the main skill that has helped charity leaders in the last year, HR and financial management skills have also been vital. Only 34% of respondents to our survey felt that they and their organisations have sufficiently strong skills to cope with the challenges they've faced, with 35% seeing skills gaps in their teams.

We're concerned about skills gaps, especially around planning ahead. Skills such as cashflow forecasting are essential to enable decisions to be made in good time. Thinking about the future and exploring different scenarios helps organisations to be prepared – even in uncertain times.

Around half our consultancy projects focus on forward planning, and we also run webinars on business and financial planning. We will continue to invest in this area of skills development, to help charities and leaders be ready for the future.

Positives from a year of lockdown include a better work/life balance for many, and improved wellbeing. There have been opportunities to develop as a leader, and for learning – we have had over 3,000 delegates to our webinars since March 2020.

Demand for our services is increasing strongly. Halfway through our financial year, we are at least 40% ahead of our expected activity level. In our survey, 49% of respondents had used external advice and support since last March, and feedback suggests that there is a strong element of external advisors reducing a sense of isolation, as well as providing focused support.

Reviewing our work with charity clients and carrying out a survey have reinforced our commitment as Cranfield Trust to be there for charities as a reliable source of help: whether this is providing help for leaders, for managers, for Boards and for organisations as a whole. What's critical is that we work together to ensure that charities keep being there, and keep providing their vital services to all our communities.

**Amanda Tincknell CBE**  
**Chief Executive**  
**May 2021**

# Key Skills that got us through the last 12 months

**76%** of Chief Executives and leaders said **strategic thinking and planning ahead** was the skill they'd drawn on the most since March 2020

In our survey, Chief Executives and other leaders told us that the management skills they'd needed most over the last year were strategic. Strategic thinking and planning ahead were cited by 76% of respondents as the skills they'd drawn on the most since March 2020.

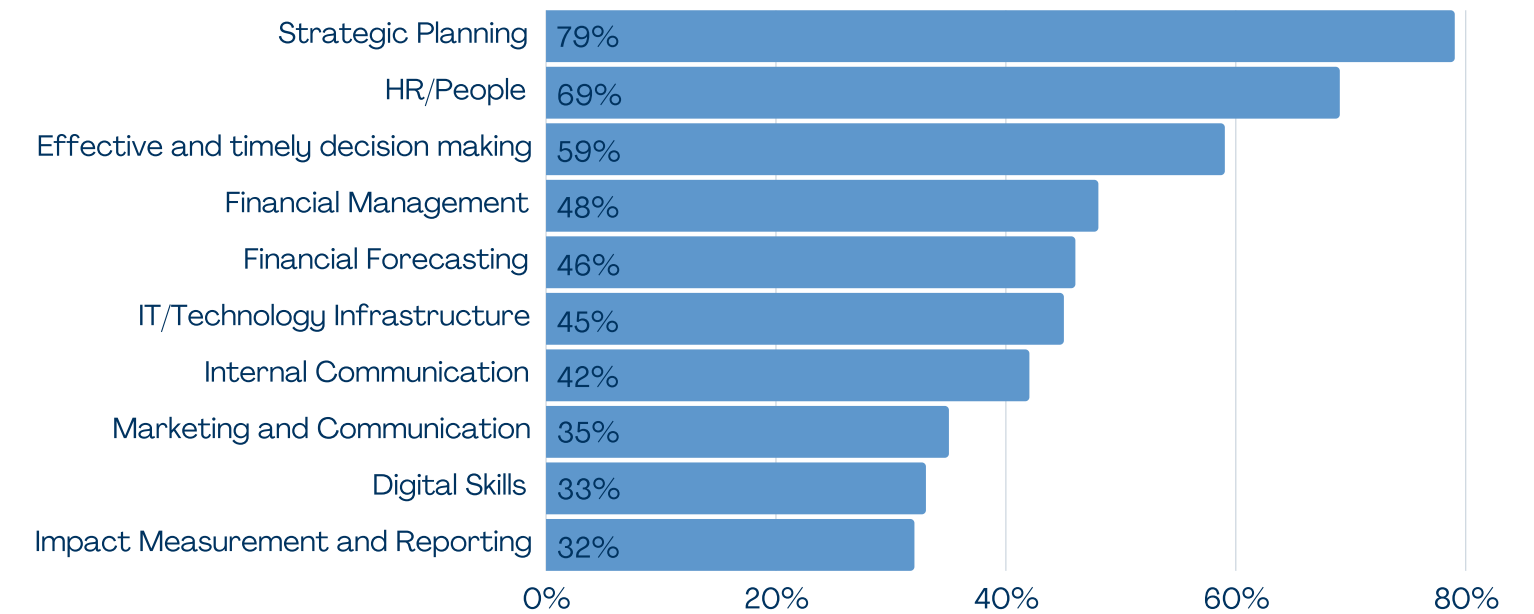
Survey findings broadly matched our experience at Cranfield Trust. 50% of our consultancy projects in the last year have been supporting strategic and business planning activities. This type of planning is usually medium to long term, but our current experience is that charity leaders are looking at much shorter planning horizons than usual. Some are only looking three months' ahead, others no more than 12 months, as the operating environment is still so uncertain.

'As a small local organisation with multiple stakeholders **making drastic changes is tough - even though the evidence for that change is clear.** Whilst it feels uncomfortable to benefit from this terrible time, **COVID has helped me make the changes I wanted to make** and so I've actually been able to move us forward as an organisation'

- Survey participant.



## Top 10 key skills



HR is also high on the list of our activities: for charities, supporting staff to work in different circumstance, as well as keeping up with changing furlough arrangements, has been challenging. We are now receiving many requests from organisations considering a restructure. We anticipate that these will continue through to the end of the furlough scheme in September.

Financial management is a growing area of our practice and came up high in the survey findings. Good forecasting is vital in effective and timely decision making, and we estimate that only one in three small to medium sized charities had cashflow forecasts before the pandemic. We are working to reach as many charities as possible through our consultancy, webinars and online resources to ensure that more organisations adopt this essential tool into their management practice.

The combination of strategic and practical skills has cropped up throughout our study: it's important to have skills and space for thinking ahead, alongside managing the critical day to day issues around people and finances. Vital skills highlighted in the survey responses broadly matched the pattern of demand for Cranfield Trust support.

## Confidence in management skills

We asked survey participants whether they and their organisations had strong enough skills in key management areas.

**35%**

felt that  
they have

**skills  
gaps**

in their

**team**

or organisation

**12%**

identified

**skills  
gaps**

in their

**trustee  
boards**

**34%**

felt that  
they have

**good  
skills**

to deal with the  
challenges  
they've  
faced

**18%**

felt that they had

**gaps**

in their

**own  
skills**

'This has been the **biggest challenge** I have faced within the organisation but by working hard and pulling on **resources and support** offered we will **come out stronger**.'

”

- Survey participant.

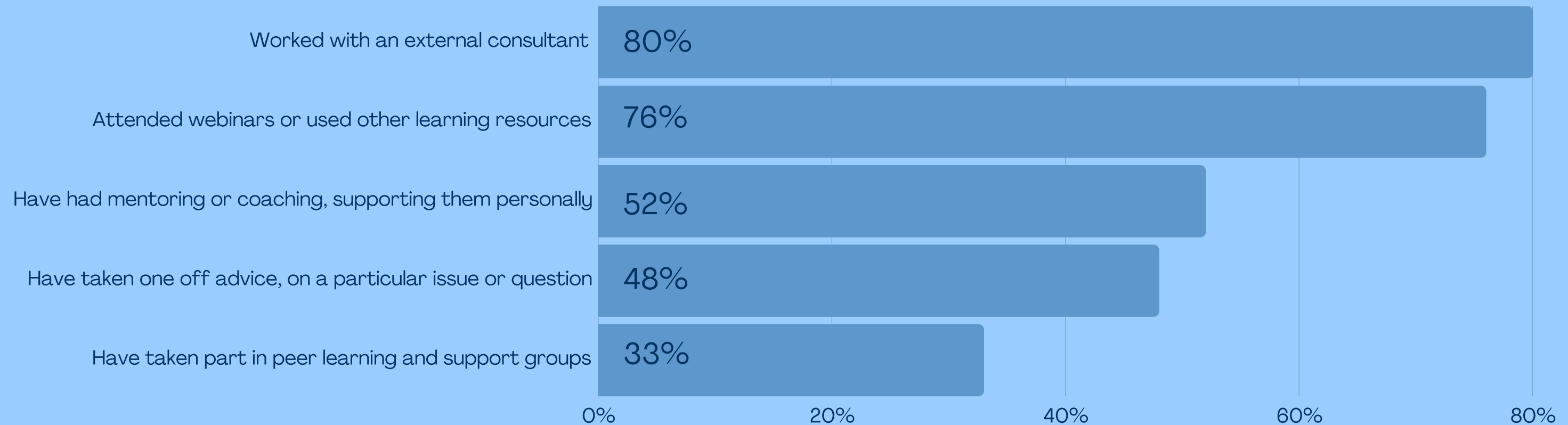
# External Support: helping to get through

At Cranfield Trust, we expect to start over 400 new assignments with charities this year – both consultancy projects and mentoring, thanks to our volunteer consultants and mentors. Our sense from recent conversations with charity clients is of real relief, reassurance that someone can help, that they're not alone, that there may be a way forward. It has been and is a very isolating time for charity leaders, who have often felt that they are out on their own in a fast changing and hostile world.

For many charity leaders and managers, external support has brought necessary skills and provided connection and reassurance in lockdown. 49% of respondents have used external management advisors or support in the last twelve months:

'Often those in **leadership positions** have been assumed to be **coping** and expected to keep the organisation **safe and sustainable**. This has been **lonely** and super hard at times.'

- Survey participant.



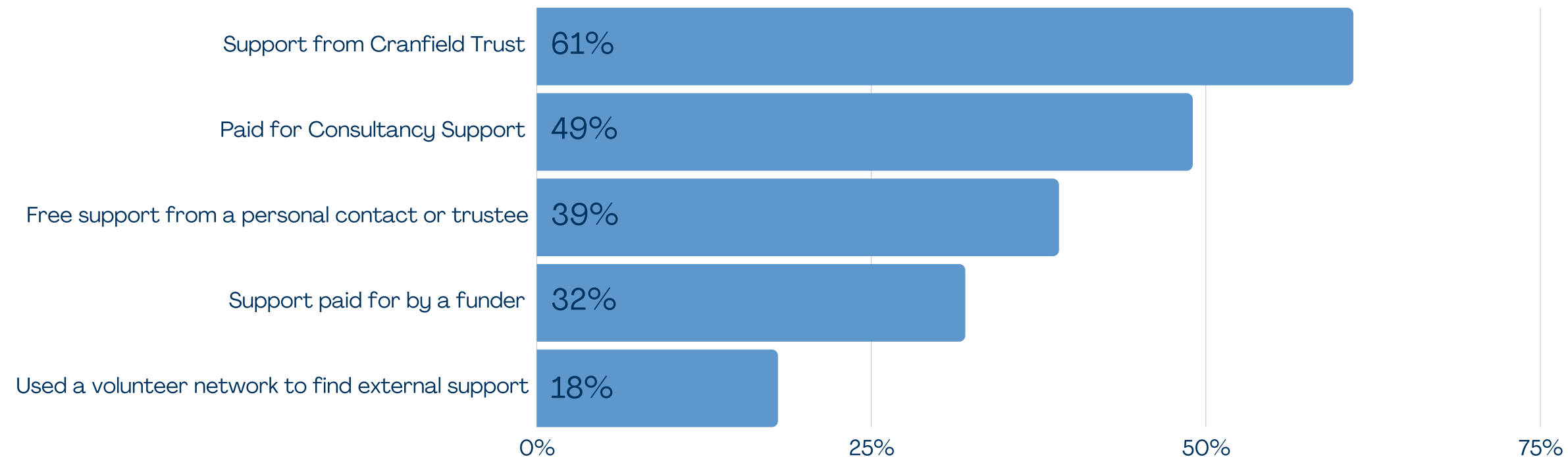
# What helps most

One of the biggest changes that we have seen since last March is the growing need for leader support. Mentoring leaders and managers now makes up 25% of our activity.

We identified the need for peer support early in the pandemic, as charity leaders approached us to help connect them with others. Our peer to peer support groups have now worked with over 50 charity Chief Executives, coming together in a mutually supportive, facilitated group to share challenges and practice. We anticipate that demand for both mentoring and peer support will continue to be strong over the next twelve months at least.

The survey asked charities how they had accessed their external support.

61% (48) of the respondents who had used external support had worked with Cranfield Trust in the last twelve months – the survey was largely completed by clients or contacts of the Trust. Significant numbers of charities had used paid consultancy and other types of external support.



'The opportunity for **peer-to-peer** networking and support, both locally and nationally, has been really important. I have felt very **unsupported by my Board** and therefore have needed to get **support** through another network.'



- Survey participant.

'The provision of ongoing external **and specialist support** during the pandemic needs to continue as we continue to face **challenges** and the benefits have been considerable.



- Survey participant.

46% of survey respondents who had used external support mentioned other support organisations or bodies that they had worked with – there were 27 different organisations mentioned by 36 respondents. No one organisation was mentioned more than three times, showing that charities are drawing support from a wide range of providers.

Types of support covered a wide range of issues, from core management functions: strategic and business planning, governance, HR, finance and marketing/comms to peer support helping participants to share ideas and concerns, and to support one another.

Benefits of external support were wide-ranging, from ‘helped me focus’ and ‘enabled us to change our strategy quickly’ to ‘hearing how others are coping with the current situation’ and ‘giving me confidence to take decisive action and invest in areas of weakness.’

‘The **mentoring has been invaluable to me**. It has helped me to **focus** on what is needed for me to be able to work towards future goals and has been emotionally supportive too.’

”

– **Survey participant.**

‘**Support has helped with upskilling** in areas my organisation wouldn't have known it needed before the pandemic.’

”

– **Survey participant.**

# Board involvement

Governance issues did not feature highly in our survey findings, but in our work at Cranfield Trust, boards and governance are creating more demand for support than normal.

The age-old challenge of developing an effective working relationship between Chief Executives and trustee boards continues to hold small charities back. The problem is often a combination of the Chief Executive not acknowledging and accessing the experience that exists within a board and the board members not fully understanding the activities of the charity and contributing more effectively. We have found that some of our client Chief Executives are confused about how to engage with either passive Trustees or Boards that are too operational.

‘I am **eternally grateful** to the very small number of staff that we have whose **loyalty and hard work** has helped through the last 12 months. But I am **incredibly disappointed** in most of the **Board members** and I realise now how important their support is during times of **crisis** such as the pandemic – this has never been highlighted before and I am a little **shocked** at their **lack of involvement** outside Board meetings when, given what we are going through I would have **anticipated additional support** from them.’

”

– **Survey participant.**

## What next? Looking ahead

We asked survey respondents to think ahead about the issues and challenges that would have most impact on their organisations over the next twelve months. The main concern was funding and sustainability – securing the future of their organisations. 65% of respondents gave this as a challenge, many recognising that longer term funding models will need to change. Some charities which have been eligible for COVID emergency funds are in a strong position in the short term, but realise that things will not go back to how they were before the pandemic. Moving back into lockdown at Christmas 2020 was a major setback for many charities dependent on trading activities or event fundraising.

A little lower down the scale of challenges were:



For **leaders**, the **main challenges** that they are facing personally are:



Of other concerns mentioned, for leaders rather than organisations, the most frequently raised was around generating and diversifying income (9%). Others included changing needs of service users, rising demand/lack of capacity, governance and board development, supporting staff and service users, and simply, 'survival.'

**'Balancing the needs of the communities we support with the needs of staff has been challenging.'**

**- Survey participant.**





# Positive change for leaders

In the survey, we asked about positive changes, brought about by the pandemic, that leaders hope to sustain as lockdown eases.

## Better Work/Life Balance

For leaders and managers, efficiencies gained through working at home and online meetings were important, contributing to a better work/life balance. 21% mentioned this in their survey responses.

At Cranfield Trust, we are seeing charities asking for support to look at their flexible working arrangements. Striking a balance between staff appetite for flexible working arrangements and a more traditional view from managers focused on people being present and visible in the office will be important - to attract talent and benefit organisations and staff. As we start to return to office working – perhaps in a flexible, blended way - we will need to consider the social shifts taking place and how these will play into workplace expectations.

## Improved Wellbeing

For 9% of leaders, improved self-care and increased wellbeing were a positive outcome of lockdown that they will work to retain.

We're very conscious that many people contacting Cranfield Trust have limited bandwidth – they are dealing with family and personal issues alongside the pressures of work. Acknowledging these and ensuring that the support we offer takes account of their availability and energy is especially important at present.

'Being **calm and confident in myself** has been important for the people around me but at the same time acknowledging the ups and downs for me and everyone else.'

- Survey participant.



## Team Capabilities

Although small in number, there were some highly positive responses around team working and confidence in colleagues: 6% of respondents said that they had delegated more, discovered new capabilities in their colleagues, and had managed with a lighter touch. 4% said that they had increased communications with colleagues and valued having more interaction with their teams.

## Leader Development

Some respondents mentioned their development as leaders during the pandemic – they are able to make strategic decisions more quickly, are more responsive to change, and felt that they were a more compassionate leader. Several said that they had strengthened their belief that their organisations can rise to challenges.

'As I've always known, **our staff are the most vital element of what we do**. My team has been **resilient, determined, creative and immensely hard working** in very adverse conditions. We've learned a lot and the charity has come through stronger and with more services to offer people living with cancer.'

- Survey participant.



'Through a combination of all recent activity, I have learned to **'let go'** of some functions. As one of our team put it just last week, I have realised that 'daddy doesn't have to do everything!'

- Survey participant.



Only four respondents felt that nothing positive had come out of the pandemic.

# Positives for organisations

From an organisation perspective, many of the views on positive changes concerned the adaptability of organisations, and an increasingly digital approach to services and operations.

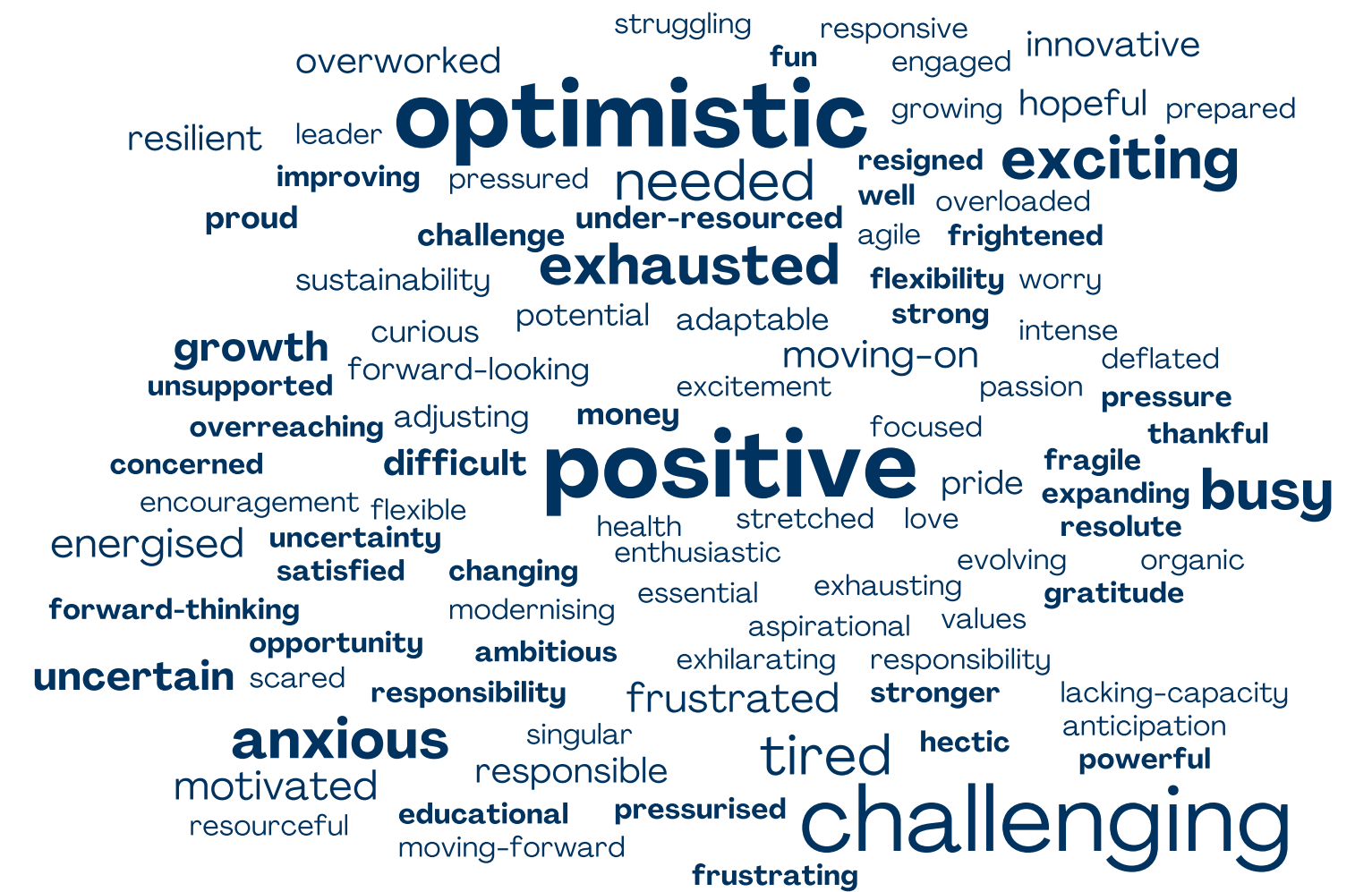
25% of respondents said that they had achieved positive change in their digital development and online services, and 15% plan to retain at least some remote working in future.

Other positive changes noted were the adaptability of staff and closer working relationships (11%) and improved communications, both internally and externally (5%).

'Glad that we **adapted and readjusted services to meet demands** however this has come at great deal of **personal cost/pressure**' ”  
- Survey participant.

# Mixed feelings

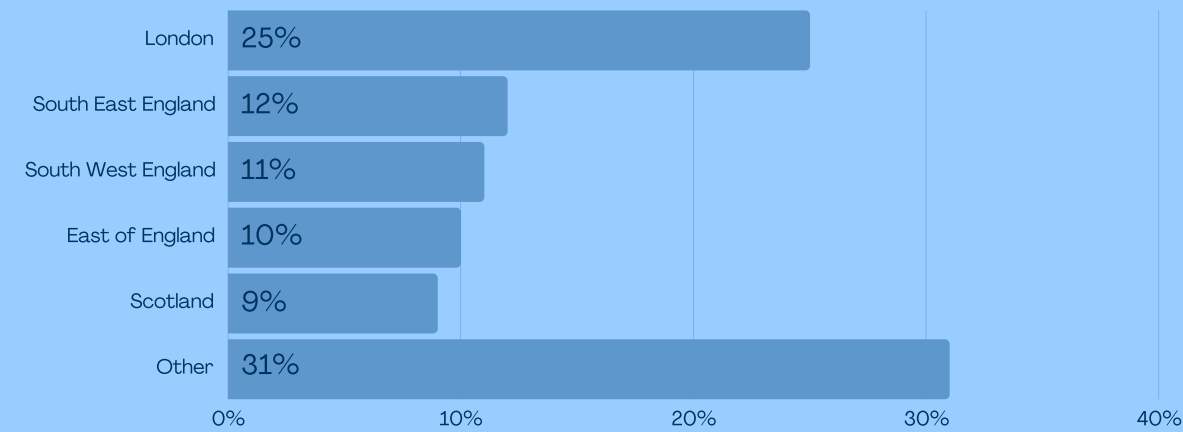
To close our survey, we asked respondents to give three words to describe their current feelings about their roles and organisations. The results give a mixed picture, with some strong positives balanced by almost – but not quite – as many negatives.



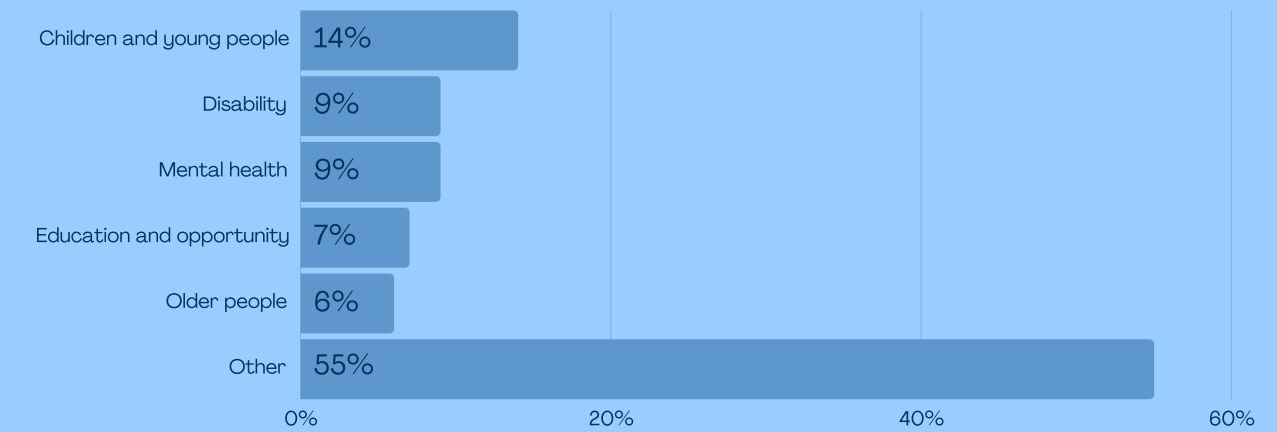
# About the survey

The survey was open between 11th March 2021 and 6th April 2021. 170 replies were received in the period to 6th April 2021, findings from which contribute to this report. The respondents were distributed as follows:

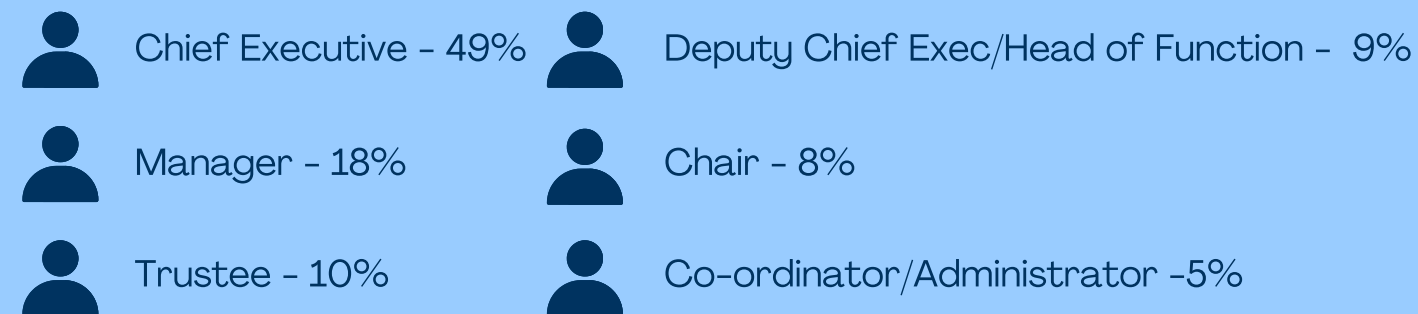
## Location:



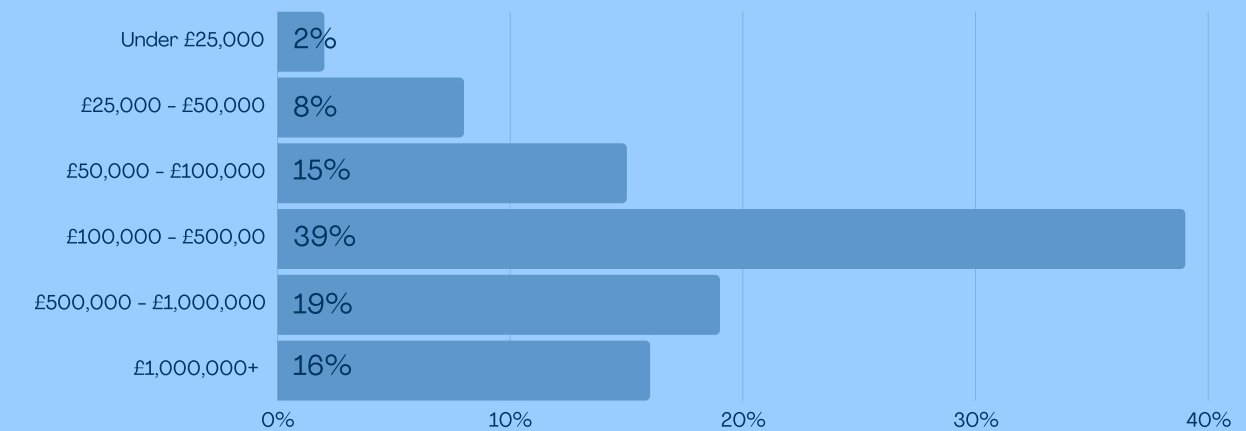
## Main area of work:



## Job role:



## Income:



## Relationship with Cranfield Trust:

The survey was promoted through Cranfield Trust's mailing list of over 3,300 charities, and through social media. One question asked 'Who provided the support?' in relation to external support used by respondents' organisations. 79 respondents answered this question, and 48 (61%, 28% of total number of respondents) had worked with Cranfield Trust in the previous 12 months (since March 2020).

# Supporting our work

Cranfield Trust is a registered charity. We rely on the generous financial contributions of funders and individual donors to help us deliver and sustain consultancy, mentoring, learning, advice and resources for charitable organisations. We are extremely grateful to everyone who supports us financially, and by volunteering their time and skills to work with us.

Demand for our services is increasing significantly. Charities need our support and we want to be able to respond to them and their beneficiaries.

If you are an individual, a representative of a charitable trust or foundation, or a commercial organisation, we welcome your support.

You can find out more about who we are and what we do – and you can make a donation – through our website. Or, please feel free to get in touch. We would be delighted to tell you more about our work.

Cranfield Trust is deeply grateful to everyone who helps to make our work possible. Funders and donors enable us to develop and manage our work, and our volunteers are at the heart of what we do. Thank you to all those who support us, financially and by giving their time and skills to voluntary organisations through Cranfield Trust, making a difference to their communities and the services that support them.

## Contact us

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