

**Request for Proposal:
Cranfield Trust Management Learning Programme
February 2023**



Project overview

Cranfield Trust is the leading provider of pro bono management support to the voluntary sector. Over 33 years, we have supported more than 5,000 charities with free consultancy and mentoring assignments, and we also offer telephone support, peer support groups, webinars and information resources via our website www.cranfieldtrust.org.

Through our consultancy, we work with over 260 small to medium size welfare charities every year. We observe that charities often lack key management skills – strategic, financial, people, marketing and comms. Many of our projects are business plans, and we tackle these – and other projects – as one offs, starting afresh with each charity, every time, although also pointing charities to our recorded business planning webinars and website resources on the topic.

Current learning activity: We provide free webinars to charities, in two streams: 'Learning with Leaders', which provides fresh management thinking from academics and leading practitioners, and 'Essentials to Excellence' which covers key management topics, for example, business planning and financial forecasting. We generally attract around 100 delegates to each of our live webinars. Our website resources on management topics are well used, and we had 780 views of recorded webinars in our last financial year.

Available training: There is a great deal of training available in the voluntary sector, and more widely. Training in key management topics is readily available online, and in person. Our observation is that most voluntary sector staff do not take a great deal of general management training, and prefer training that is specifically developed for the voluntary sector market.

Much of the specialist voluntary sector training is geared to leadership and strategy, not management, so middle managers or emerging managers do not have many specialist voluntary sector learning opportunities. Some of the training available is relatively high cost for smaller charities.

Our view is that there is little training geared to people developing their careers in the voluntary sector, to help them develop management skills early in their careers, or to help Chief Executives and senior leaders in smaller charities refresh their skills or fill skills gaps.

Opportunity: We would like to undertake a research study to explore available management training for small to medium sized charity leaders and managers, their interest in taking up existing training opportunities, and the potential for the development of a management training programme for the sector. We want to understand what needs to be done by us to

develop a relevant, flexible and cost-effective management training offer to small and medium sized charities.

The study will act as a feasibility study to inform the possible development of a training programme, to be developed by Cranfield Trust and an academic partner.

Project Goals

To explore the feasibility of establishing a management learning programme for leaders and managers of small to medium size voluntary organisations, by

- Mapping and categorising main, current voluntary sector management training options and providers
- Conducting a review of skills gaps amongst leaders and managers in small to medium sized voluntary organisations
- Understanding attitudes towards management skills development and training amongst leaders and managers in small to medium sized voluntary organisations, testing our assumptions:
 - Although there is a lot of management training available, in person and online, charity managers prefer training that is geared to the voluntary sector
 - Low cost management training is not widely available for small to medium sized charities, especially for emerging managers
 - Much voluntary sector training is leadership training, rather than covering management essentials
- Understanding requirements and preferences around online/in person learning, independent/interactive learning, acknowledgement and accreditation
- Exploring cost/price sensitivity of potential students/clients

Scope of Work

Phase 1: Briefing and preparation of project plan with identified landmarks, and with liaison and quality assurance arrangements

Phase 2: Market mapping - to produce a report identifying and analysing available management training for charities/voluntary sector

Phase 3: Fieldwork to include interviews, focus groups and survey with leaders and managers (including volunteers, employees and trustees) in small to medium size charities (Cranfield Trust could provide sample, introduction and contact details). Bidders should make suggestions about content. It is anticipated that perceptions of skills gaps, training needs, current available training providers and offer as well as price sensitivity could be addressed along with other relevant considerations (Cranfield Trust could distribute survey).

Output a report describing main findings, trends and issues that helps Cranfield Trust understand the challenges of the sector.

Phase 4: Based on the findings a report with recommendations for future internal and external changes required for the development of training activity or other course of action to help Cranfield Trust develop relevant, flexible and cost effective management training

offer to small and medium sized charities. The report should include editable summary slides that Cranfield Trust leadership can use to present the work to trustees and others.

Submission requirements

Please submit a short proposal to amanda.tincknell@cranfieldtrust.org, with

- Background of organisation
- The methodology to be applied, with proposed timescales, indicating sample sizes to be used for mapping, fieldwork and survey as well as the number of focus groups and interviews
- Roles, responsibilities and short CVs of the team that will deliver the project
- Reference examples/case studies of similar work
- Costing with breakdown against different stages/activities to include all costs, expenses and taxes (if relevant) and an initial assumption of how much Cranfield Trust staff time might be needed to support the project.

Proposals must be received by end of day on Thursday 23 March 2023. Interviews will take place in the week of 27 March 2023.

Timescale

Cranfield Trust would like to carry out the research project as soon as possible, ideally starting in mid-April, with the aim of reporting to the Trust's management team in early September and to the Trustee Board in October 2023.

Budget

The Masonic Charitable Foundation has generously supported Cranfield Trust with a grant of £11,400 which is our budget for the research (in total, to include VAT where chargeable), plus staff time to support the research, to be negotiated.

If the budget is insufficient to cover the cost of the whole research activity, we would be glad to have an indicator of what could be successfully completed within this budget.

Contact

To discuss the proposed research, before submitting a proposal, please contact

Amanda Tincknell, Chief Executive, Cranfield Trust

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