



# Our Shared Challenges:

Connecting Charity Leaders in Wales to the support they need

May 2022



# Introduction



Cranfield Trust provides free management support to frontline welfare charities, working with a register of volunteers from the commercial sector. Thanks to our 1400 volunteers, every year we deliver pro bono consultancy and mentoring services to over 500 charities throughout the UK. We also provide telephone advice, peer to peer support groups, webinars on management topics, and online information resources.

During the pandemic, we have seen charities in Wales working hard to sustain vital services, and adapting quickly to the changes that lockdown forced upon them. We had hoped to be emerging

from the pandemic by now but COVID numbers remain high. We are facing sharply rising living costs and continuing concerns around mental health and wellbeing, and we are adjusting to hybrid working models. War in Ukraine has brought an urgent humanitarian crisis to people still living in the country and refugees, as well as international political and economic turbulence. We are living in uncertain and worrying times, increasing the already significant pressures on voluntary sector leaders and managers, as they respond to the needs of the people they serve and manage their own organisations.

A significant amount of the funding for Welsh charities has historically been granted by the Welsh Government, but there has been a steady decrease in spending over the last ten years. Charities in Wales are estimated to have lost 24% of their total income during 2021, which represents a £620m loss.<sup>1</sup> Smaller charities are experiencing the intense impact of these developments as competition for grant funding intensifies further and the uncertain economic environment places other sources of income, such as individual and corporate giving, under pressure.

We believe that charities face as difficult a time over the next two years, as they have since March 2020: they will face growing demand from service users, while in a very tough funding environment.

<sup>1</sup> - WCVA. Briefing paper - The Equalities, Local Government and Communities Committee: The impact of COVID-19 on the voluntary sector. Feb 2021. [Link](#)

We undertook a Wales-wide, online survey. Our aims were: to deepen our understanding of the management skills charity leaders need and the management challenges they face; the support they need to resume, adapt and futureproof their activity; and, to gather insights to inform how Cranfield Trust can tailor our services as we look ahead to new ways of working after the pandemic.

The findings are from 314 voluntary sector organisations across Wales: a breakdown of their size, locations, field of work and the role of the person responding are in the Appendix (p13). The survey explored the challenges that organisations face and their management support needs going forward. We also conducted telephone interviews with 30 existing charity clients who shared their reflections on the questions raised. We are grateful to the twelve voluntary sector support bodies and funders who helped to engage their contacts with our survey during November and December 2021.

Through the survey, charity leaders told us that they are under enormous pressure, they are struggling to find time to think strategically while acting operationally, and they need external support now. It is apparent that many of our survey respondents are not aware of the pro bono support that is available to them. We will work to raise awareness of the support that can help charity leaders, both from Cranfield Trust and other pro bono providers.

We have listened to charities in Wales and gained a renewed understanding of their requirements for management support. We are committed to supporting charities, their leaders, managers and trustees, through our services, investing in delivery and communications to ensure that more charities in Wales have the management capabilities and confidence they need to respond to the challenges of the times.

**Amanda Tincknell CBE**  
**Chief Executive**



# Headline Findings

**73%** of respondents told us that they need immediate management support.

In response to the question of whether it would be helpful to have external management support now, 73% of respondents said yes.

With respect to using external support to develop skills/address key challenges, charity respondents told us:

- 38% had used external support in the last 12 months
- Of these: 62% had used free support; 26% paid support; and, 12% a mixture of free and paid support
- 86% of all respondents had not worked with Cranfield Trust before and 14% had worked with Cranfield Trust

Those who had worked with us were asked whether they would recommend Cranfield Trust and 100% respondents said that they would recommend us.

## Critical skills

Thinking about the skills they have needed and the challenges they're facing, survey respondents told us that the top three skills that charity leaders have needed in the past 12 months are:

**83%** Strategic thinking/planning

**76%** Financial management and forecasting

**69%** People management and support

Across our work at Cranfield Trust, strategic and business planning have continued to be at least half our consultancy activity over the past two years. Although the climate has made it exceptionally difficult to plan ahead, it is vital for organisations to confirm their strategy and explore different scenarios, to focus on their purpose and to ensure that they have a clear financial picture of their future.

We know that staff wellbeing has been and continues to be a real concern – as well as a management issue – for charity leaders. The pressures of supporting colleagues through the major changes brought by Covid, as well as managing fast-changing resources due to staff absence and family challenges, continue to be demanding.



# Priorities and Challenges

## Critical skills

The top five organisation priorities for the next 18 months are:

**78%** Financial management, planning and sustainability

**73%** Fundraising

**45%** Marketing and comms

**43%** People management

**40%** Recruiting and managing volunteers

The future looks worrying for many charities. Emerging from the pandemic, many charities have depleted reserves and are now finding that fundraising and income generation are very challenging. World events – the pandemic, now the situation in Ukraine – rightly take the public focus, which can make public and corporate fundraising difficult for charities not directly involved, and there is intense competition for other types of funding.

Marketing and communications are of growing importance in supporting fundraising, and supporting staff and volunteers to maintain resources continues to be difficult with Covid still affecting so many people.

"The primary barrier is that my role encompasses every aspect of running the centre and as such I struggle to find time to be able to work on lots of things that can help us to improve our services and offer a more comprehensive range of services for the community. We basically need two of me but I am doing everything and often feel under pressure" - **Survey respondent**

## Challenges

Survey respondents gave their main leadership challenges – now and anticipated over the next 12 months:

**85%** Having the time/space to be both operational and strategic

The main leadership challenge mentioned by respondents was balancing the operational pressures of their roles with strategic activities. Many leaders have been pulled into operational activities to a larger degree than usual, to support increased activities or to cover for colleagues absent due to Covid, and the pace of change during the pandemic has meant that many charities have been responsive, rather than being able to plan ahead. Setting time aside to focus on strategic issues is critical – and in Cranfield Trust's experience, this tends to reduce pressure rather than add to it.

Other challenges were

**51%** Supporting my team

**48%** Having confidence to plan in uncertain times

**30%** Having confidence in my organisation's future

**27%** Working effectively with Board of Trustees

**20%** Feeling isolated

(302 responses)

\*Respondents were able to select more all options that apply to reflect their needs

# Barriers to development

Looking more broadly at working with external support, we asked charity leaders about barriers to tackling organisation development and developing management skills through working with external support. The barriers were mainly practical:

**46%** mentioned lack of core/long term funding as a barrier to development in general

We believe that this is around instability of organisations i.e. it is difficult to invest in organisation development when there's a lack of confidence in sustainability.

**20%** said time was a major barrier to organisational development and upskilling of staff and Board members.

**20%** mentioned staffing issues as a barrier.

**4%** reported teams being overstretched and heading towards 'burn out'.

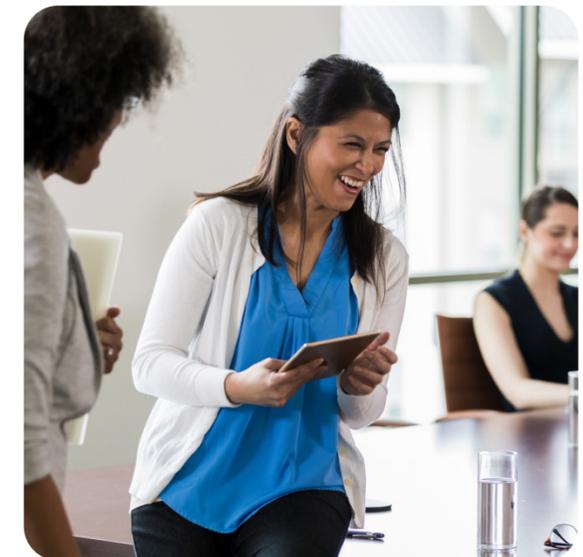
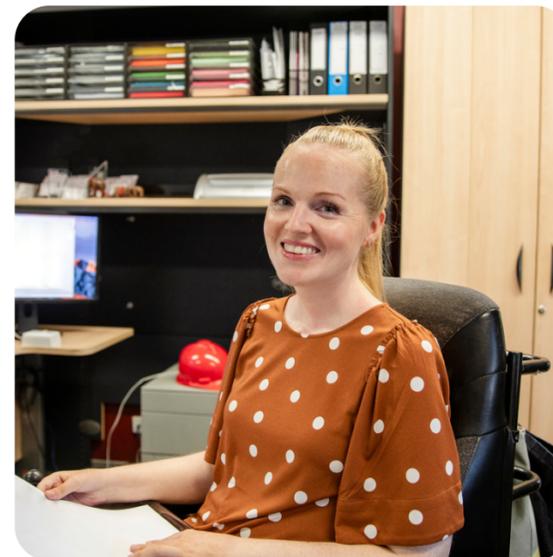
Time and staff pressures are a considerable barrier to investing in organisation development – this parallels the issue reported by respondents as not having enough time to balance strategic and operational activities.

Our experience is that creating space to engage with development activities – either as a focused consultancy activity or through mentoring – can relieve pressure. All our support is geared to the charity's own needs and timetable and we work at their pace. Cranfield Trust clients report that, although finding this space is difficult initially, the investment of time pays off in terms of making strategic progress and addressing pain points.

**15%** mentioned lack of funds to pay for consultancy support.

There is a substantial amount of pro bono support available. This point highlights a challenge for Cranfield Trust and other support organisations, which is to ensure that charities know we're here and ready to work with them. In some cases, charities will need or choose to work with paid providers, but in many situations, pro bono support is effective and efficient. Pro bono organisations need to find ways of communicating their offer to ensure that charities know what help is available to them.

"Cash flow is an issue and we need certainty in future funds in order to begin something which has a long shelf life." - **Survey respondent**



# Capability snapshot

## Capability snapshot: we asked charities about their existing strengths and confidence:

Charities were confident in some areas of their management and less confident in others. Asked about their strengths, their sense of purpose came out strongly:

**79%** We are clear about our organisation's purpose

**52%** We have the in-house skills to deliver our purpose

**43%** We clearly evaluate our outcomes and demonstrate impact

Financial management was strong in some areas, but less so in forecasting. Reserves were only strong in a third of respondents' organisations:

**62%** We prepare regular management accounts

**61%** Our accounts are externally audited

**55%** We prepare an accurate annual budget and measure performance

**35%** We do cashflow forecasting and scenario planning

**35%** We have enough reserves to reflect organisational stability

People management areas were not as strong and demonstrated a sense of inadequate resources:

**53%** Our staff policies and procedures are robust

**36%** We regularly review our processes and address underperformance

**34%** Our organisational structure supports our needs

**25%** Our volunteer capacity fulfills our purpose

Confidence in leadership and governance was not high:

**49%** I am confident in my leadership to manage change

**40%** Our leadership team is proficient in managing change

**38%** Our Board has the skills required to be effective

Planning ahead was weaker than we would hope:

**38%** We have an up to date business plan

**18%** We have a fit for purpose comms plan

**17%** We have a robust fundraising strategy and plan



# What Support is Needed?



We asked charities what support they would need from Cranfield Trust's free services to help them over the coming months. Their responses were:



"We need to review the staffing structure to free up some of my time so that I am not as engrossed in the day to day functions"  
- **Survey respondent**

"Is a meeting about the future more important than answering the 50 emails that are sitting in my inbox? Is taking a day off worth the amount of work we will face when we get back?"  
- **Survey respondent**

**73%** The survey highlights that 73% of voluntary organisations have asked for immediate management support.

Reviewing our work with charity clients and carrying out this survey has reinforced our commitment for Cranfield Trust to be there for charities as a reliable source of help: whether this is providing help for leaders, for managers, for Boards or for organisations as a whole. It is critical is that we work together to ensure that charities are effective in providing their vital services to Wales communities.

# How we will respond



1

## Voluntary sector organisations have told us that they want online access to practical management resources

- **65% of respondents told us that they would like access to practical online management resources**
- **47% told us that webinars on management topics would be helpful**

Cranfield Trust provides free learning activities online and in person when possible, building key management skills and developing management confidence.

All our webinars are developed exclusively for leaders and managers of charities and other non profit organisations. Charity leaders and managers can gain practical solutions, best practice and vital knowledge to tackle the challenges they face today.

Our information resources provide a growing body of 'how to' guides, templates and blogs on a range of management topics.

From the survey results, it is clear that our webinars and resources could be reaching more charities. There are also many other free learning and information resources available to charities in Wales from Third Sector Support, WCVA and the regional voluntary sector support agencies. Some of these offers are aimed at start up or newer charities, often the more advanced skills development on offer is paid for training and support. Cranfield Trust resources complement and add value to these existing resources and offer more advanced skills development free of charge.

"We have a need for more information and signposting" - **Survey respondent**

"We need to find out what free training and webinars are available to us" - **Survey respondent**

### Our commitment

We will increase our marketing and communications activity to ensure that charities in Wales are aware of the free webinars and resources available to them. We will regularly consult with charities to understand the topics of most interest to them and we will provide opportunities to address identified skills and knowledge gaps.

# How we will respond



## 2 Charities asked for mentoring for leaders and managers

- **45% of respondents told us that mentoring would be a valuable service. They are 'overwhelmed' with the challenges presented by the pandemic and have little time to think strategically.**

Cranfield Trust has a well-established mentoring programme supporting charity leaders. Mentoring provides a supportive space for charity leaders to discuss challenges, rehearse decisions and review a range of issues, with an experienced mentor. Our mentoring support can be delivered very effectively online.

Many Cranfield Trust volunteers remain in contact with their client charities well beyond the original engagement, often becoming trustees of the organisation.

"Too much depends on me, I would benefit from a mentor."

"I have no time to think strategically."

"We would benefit from a Mentor as we have lots of ideas to diversify our service but could do with some thinking time and support to identify the steps we need to take."

"We need leaders with management skills."

"We are a very small team and so much of the work falls on my shoulders. Finances are a challenge and stop us from developing our team further or utilising consultants."

### Our commitment

We will raise awareness of our mentoring support for charity leaders, ensure that we have a strong register of trained mentors in Wales to work with charities in person, and seek to work with many more Chief Executives and managers across Wales, in person and remotely.

## 3 Charities asked for management consultancy to address key strategic and operational issues

- **43% of respondents would like management consultancy support to address particular strategic and operational issues.**

Cranfield Trust consultancy projects are geared to the organisation as a whole, specified to meet the needs of the charity client, and usually run over 6-7 months - but can be longer - with an average of 7-12 days of volunteer consultant input.

Around half our projects cover confirming strategy and business planning. Organisations are working hard to explore future scenarios and prepare for change and often find that the process of preparing a plan is as helpful as the plan itself. Other areas are also in demand for our consultancy support, in particular financial planning, governance, and marketing and communications.

"We need to transition from an amateur, ad hoc organisation to a structured professional organisation."

"We have the ambition to grow but everything is happening so quickly, we need support to think strategically and to prioritise the most important work that will have the most impact."

"Our governance and strategic planning skills are limited to one person."

### Our commitment

We will work with partner organisations and develop our own communications activities to ensure that charities in Wales know about our free consultancy support and how they can work with one of our volunteer consultants. Whether working in person or remotely, we will support charities and volunteers to work together to ensure that they successfully achieve the outcomes of each individual project.

# How we will respond

4

## Charities would like telephone support to discuss key management challenges

- **34% of respondents told us that 'On Call' telephone support would be of great value.**

Cranfield Trust 'On Call' telephone advice is geared to charity leaders who have a pressing problem or who would like to talk through ways to address a particular issue.

On Call is individually tailored telephone/video advice, addressing immediate, short-term issues and delivered by volunteers with skills appropriate to each organisation's needs.

Advice through On Call aims to resolve problems, as well as acting as a stepping stone to further support. We have found it to be particularly effective for small, community organisations which need advice, but do not need a more substantial consultancy project.

As a result of this survey a North Wales charity contacted Cranfield Trust to request an immediate discussion on their cashflow forecasting. The Chief Executive came back to us after the call and said: "WOW! Frank, our volunteer is amazing and knows so much, this is going to be a really significant help to us, way more than I had even considered, the downside is that it's highlighted a lot of work we need to do, but most of it is stuff we just wouldn't have known about and will lead to us making a range of changes to improve. It's shocking that an hour or so with your volunteer has helped us learn and understand more than we have over the past 3 - 4 months trying to do it ourselves."

Cranfield Trust will now provide business planning consultancy support to the charity, to help them with their next steps.

### Our commitment

Through our UK-wide register of 1,400 volunteers, we can provide support to much larger numbers of charities in Wales. We will work to raise awareness of this service, and to offer help with immediate challenges and problems to charities across Wales.

5

## Charity leaders want to support one another, sharing ideas and experience

- **30% of survey respondents said that they would like to have access to peer support.**

During the stressful period of the pandemic, we have found that charity leaders have benefitted from peer support groups, which provide a time for reflection, discussion with others, and the opportunity to share challenges and views. We believe that the benefits of this type of support will continue post pandemic.

Facilitated by Cranfield Trust volunteers, each group of four to six charity leaders meets four times over two months, for 90 minute sessions. Many of our group participants remain in contact with one another once formal facilitation is complete

We do not anticipate that the operating environment is going to become significantly easier for charities in the next 12-18 months, and know that peer support will continue to be a valuable way of reducing feelings of isolation for charity leaders.

"Working as a leader in a charity can often feel very isolating, it has been great to network and meet others in similar situations and to brainstorm ways to overcome challenges. I have formed some good relationships with a couple of the others in our group and we will continue to stay in touch. This is really important as it offers an opportunity to support one another." - **Alison Price, CEO, Age Connects North Wales Central.**

### Our commitment

We will raise awareness of Cranfield Trust's 'Peer to Peer Exchange' service to ensure that charity leaders across Wales have the opportunity to experience this supportive, group practice.



# Summary of Commitments



We will increase our marketing and communications activity to ensure that charities in Wales are aware of the free webinars and resources available to them. We will regularly consult with charities to understand the topics of most interest to them and we will provide opportunities to address identified skills and knowledge gaps.

We will raise awareness of our mentoring support for charity leaders, ensure that we have a strong register of trained mentors in Wales to work with charities in person, and seek to work with many more Chief Executives and managers across Wales, in person and remotely.

We will work with partner organisations and develop our own communications activities to ensure that charities in Wales know about our free consultancy support and how they can work with one of our volunteer consultants. Whether working in person or remotely, we will support charities and volunteers to work together to ensure that they successfully achieve the outcomes of each individual project.

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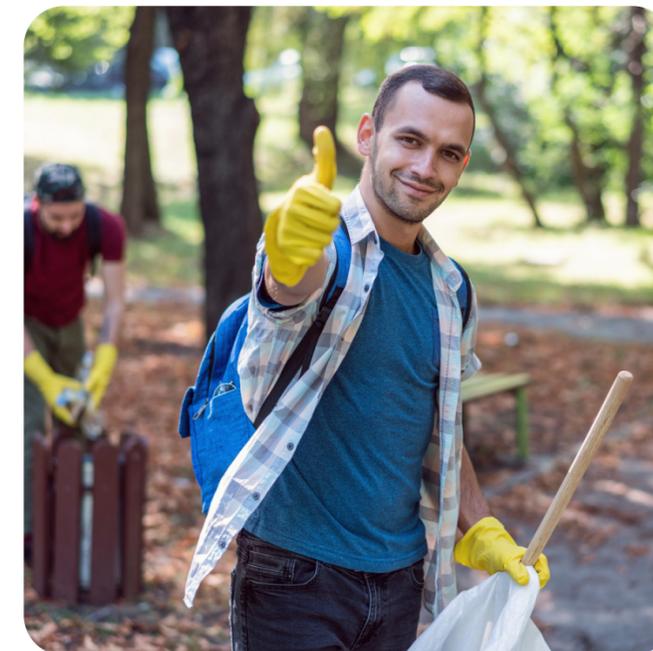
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# CRANFIELD TRUST IN WALES

Cranfield Trust was awarded two three-year grants in 2017 from The Garfield Weston Foundation and The National Lottery Wales Third Sector Skills Support Programme. The grants were to enable the Trust to deliver management and leadership support for charities in Wales through a range of services. The awards enabled us to appoint a dedicated Project Manager for Wales to raise the profile of our services, build relationships across the sector, engage Cranfield Trust volunteers based in Wales, and to increase our engagements with small to medium sized charities.

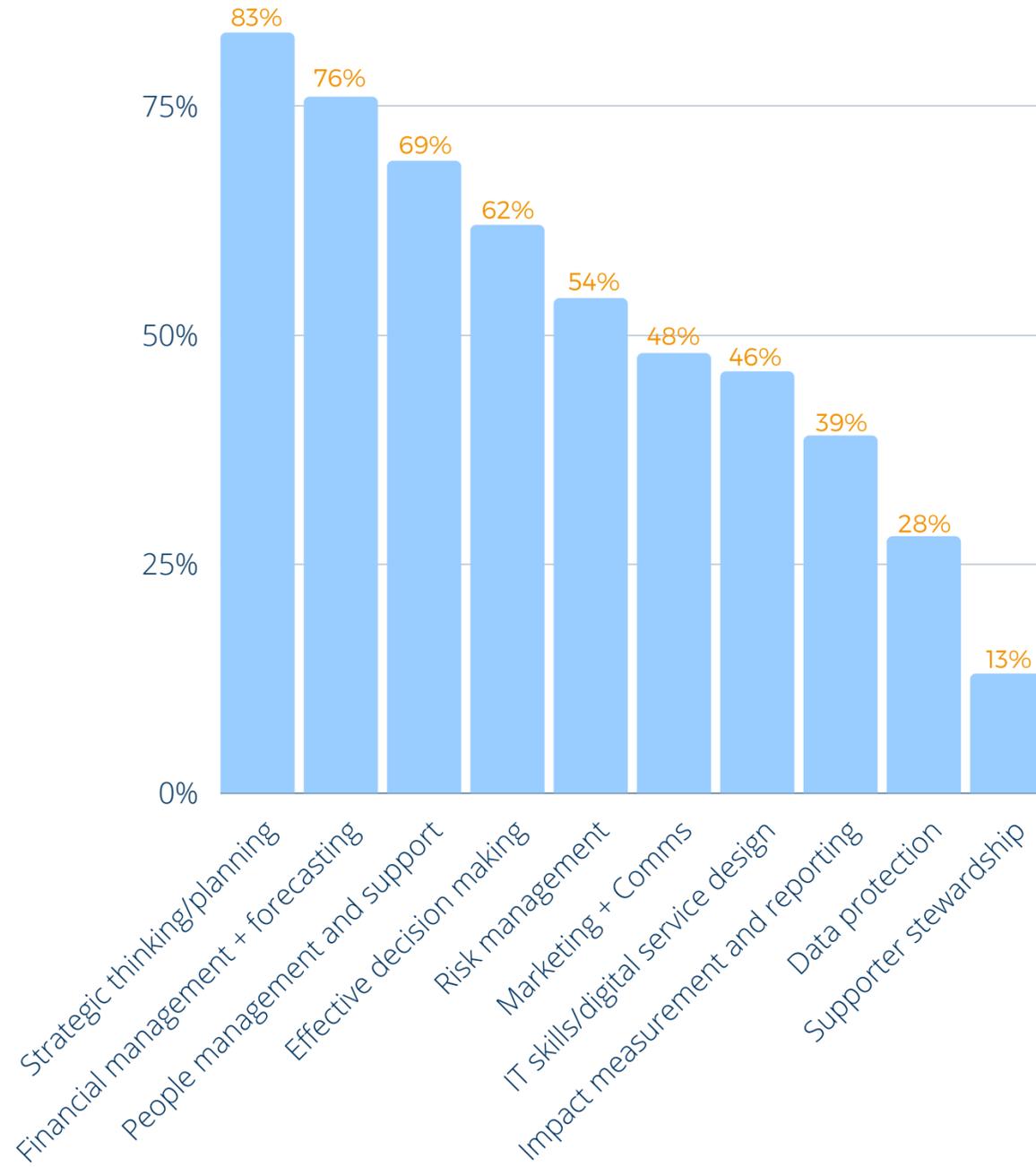
Our project design was informed by an independent feasibility study, which recommended that the project's initial focus should be in South Wales, Newport, Swansea and Rhondda Cynon Taff as they have dense urban populations and significant disadvantage. As the project progressed, some headway was made in other Welsh regions, with 30% of charities supported coming from outside of the project area. This resulted in increased demand for our services from all parts of Wales, although there is still a significant amount of work to be done to level up our activity in North, Mid and West Wales.

Our work in Wales has been a huge success and exceeded all expectations of uptake from charities: 120 charities were supported in total during the three-year grant timeframe – 210% more than the original target of 57. In addition, 210 charity leaders attended our masterclasses during the project's timeframe – exceeding the original target of 120 – and 59 volunteers based in Wales were engaged and remain active. We are committed to continuing our work in Wales, to reaching more charities, across more of the country.

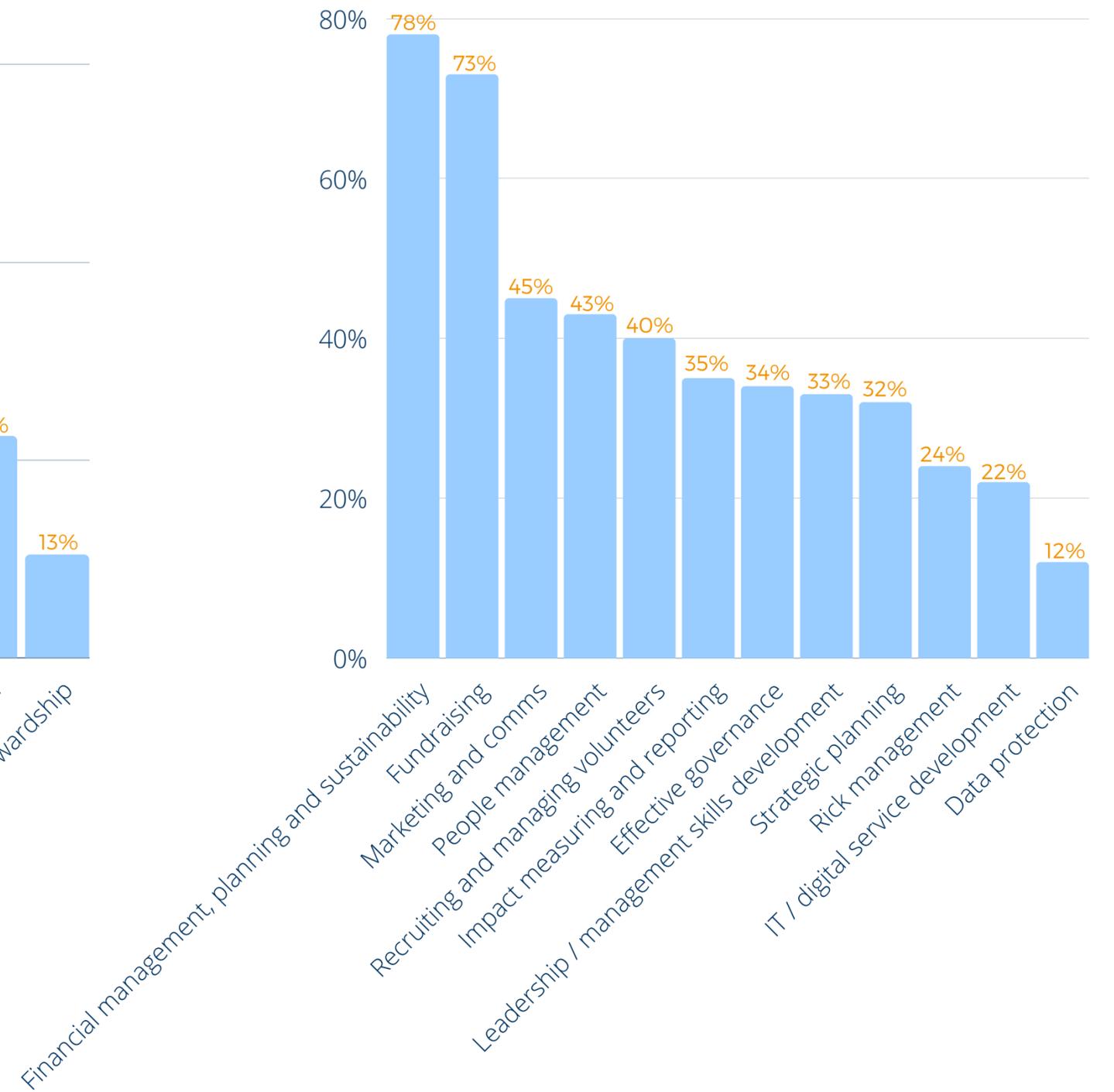


# KEY SKILLS AND PRIORITIES

Key skills needed: last 12 months



Key priorities for next 18 months



Respondents were able to select more all options that apply to reflect their needs.

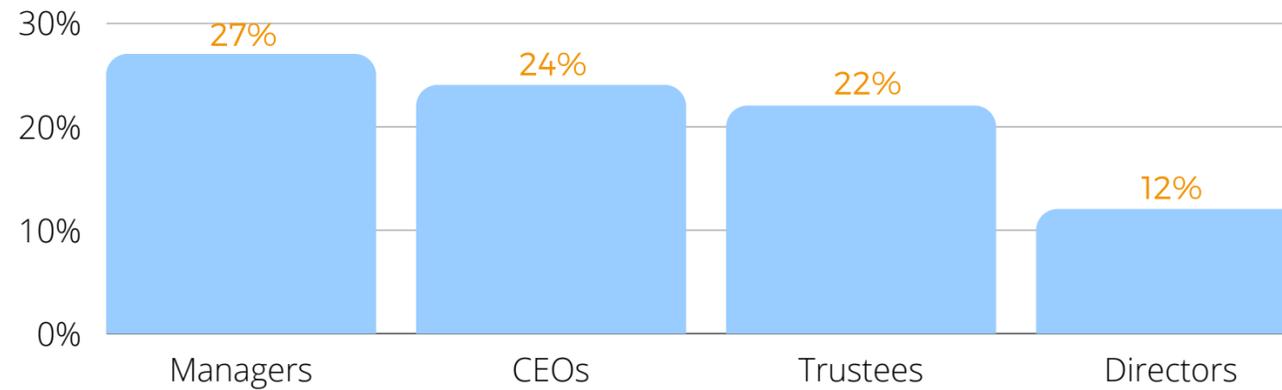
# MAIN FINDINGS FROM SURVEY

## Survey Respondents

### Numbers:

314 charities based in Wales responded to our survey during November and December 2021. Of those, 311 responded to the English version, and 3 responded in Welsh.

### Roles of respondents:



15% 'Other' were mainly made up of Officer/ Coordinator/ Volunteer roles

### Annual income of respondent organisations:



## Locations/ Coverage:



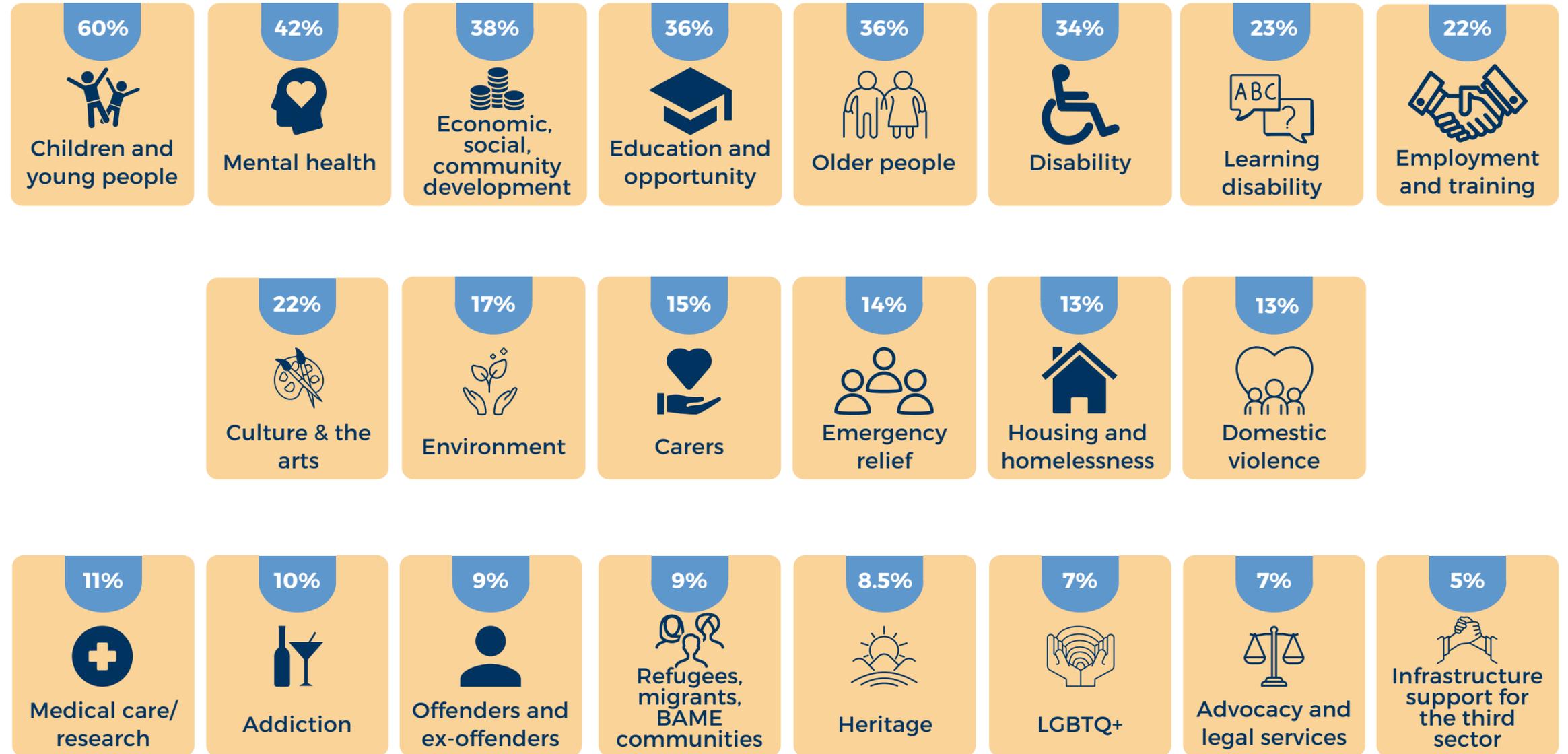
- 38.5% said they are based and/or operated in South Wales.
- 25.5% in West Wales.
- 21% in North Wales.
- 9% in Mid Wales.
- 11% said they operate across all counties in Wales (some respondents have entered both a regional and an All Wales coverage in this section).

86% of the charities who completed the survey had no previous engagement with Cranfield Trust.

# MAIN FINDINGS FROM SURVEY

## Causal remit of respondents:

Respondents were able to select more than one option to reflect cross-causal remits:



# Thank You

Thank you to the following organisations which helped us to promote the survey, ensuring a reach beyond our known contacts:

- Wales Cooperative Centre
- Council for Wales Voluntary Youth Services
- Steve Morgan Foundation
- Community Foundation Wales
- Interlink RCT
- Moondance Foundation
- Welsh Government
- Gwent Association of Voluntary Organisations (GAVO)
- Lloyds Bank Foundation
- WCVA
- Third Sector Support Wales
- CWVYS membership - <https://www.cwvys.org.uk/members/>

150 organisations with which Cranfield Trust previously worked with in Wales were contacted directly.

To ensure inclusivity, we undertook the following actions in advance of the survey launch:

- Consulted with a disability support organisation to address any barriers to access that may be faced by respondents around visual impairment.
- Enabled charities facing digital exclusion to participate through a phone call option whereby charities were supported by Cranfield Trust staff in completing the survey.
- The CWVYS promoted the survey to all 126 of their members, which includes The Centre for African Entrepreneurship, Ethnic Youth Support Team, Fio (a minority led theatre company in Cardiff) and The Race Council Cymru - all of which support young people from diverse ethnic backgrounds – and several charities supporting young people with disabilities.
- The Welsh Government shared the survey with 50 organisations/networks on the Third Sector Partnership Council group. These included:
  - Race Council Cymru
  - EYST
  - Wales Disability Reference Group (via Disability Wales)
  - Wales Council for the Blind

The survey was available and was communicated in both Welsh and English.



# We believe in building successful charities

Cranfield Trust is the leading provider of pro bono management support for charities in the UK. We have a network of highly skilled volunteers who help charities succeed and flourish by giving their time, skills and expertise to provide strategic and operational business advice and leadership support. Through our work we empower charity leaders to do more good and make the greatest difference possible to society and the millions of people who rely on the services of charities every year.

We would like to thank all our volunteers, donors, funders, corporate partners and other supporters for everything they do to support our work and help to build successful charities.

To help us continue our work, make a donation, volunteer or learn more about what we do, visit [www.cranfieldtrust.org](http://www.cranfieldtrust.org).

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