Preparing for the first client meeting – Background information

Thank you for volunteering – the pro bono support you give to small charities is so important in helping them to grow.

It is vital that you know about the organisation and the people you will be working with. The Cranfield Trust Regional Project Manager will provide each volunteer consultant with a copy of the Project Brief, this will give you details of:

- The organisation
- The scope of the project
- The person/people you will be working with or mentoring
- The timing and time commitment of the project
- Desired outcomes from the intervention by Cranfield Trust.

The Regional Project Manager will also be able to answer questions you might have about the organisation or project.

But here are some of the additional things you can do to get a fuller picture before you meet the client.

The organisation

Source	**What you are looking for – what are the real issues?**
Charity website	Read the latest Annual Report and Accounts or Annual Review - does it reflect the charities vision, mission, purpose, service offering, successes? The website may also give you a good idea about the following: Why do they do what they do? • What is their vision, mission, purpose? How do they do what they do? • Accounts, cash flow, reserves and annual report • Directors, CEO, company officers and trustees. • Resources • Service offering What have they achieved? • Do they celebrate their success? • Do they set realistic plans for the future? Are there any obvious improvement measures?
Check the Companies Register (if registered) – you will need the charity name, number or officer name	Are their accounts filings up to date or overdue? Read the latest filed accounts – does it include an auditor's report or independent examiner's report, if required? The regulations are here: https://knowhow.ncvo.org.uk/organisation/financial-

https://www.gov.uk/get-information-about-a-company	management/processes-procedures-and-controls/audit-and-independent-examination Who are the current trustees per their confirmation statement (previously known as annual return)?
Check the Charities Register (if registered) – you will need the charity name or number https://www.gov.uk/find-charity-information	Summary of income and expenditure Are their filings up to date or overdue? What are their activities, per the register, and does that concur with other sources? Where do they operate, per the register, and does that concur with other sources?
Charity social media pages	What are they celebrating? • Is it current? • Is it relevant? • Does it reflect what they do? Are they making the most of it? Who is engaging with them? What more can they do to get themselves noticed?
'News' search for the charity	Have they been in the news? • Achievements? • Negative press? What more can they do to get themselves noticed?
General internet search for the charity.	Set up a Google alert https://www.google.co.uk/alerts Are there any 'skeletons in the cupboard'? Do they stand out as someone that provides a great service to its users?

The Person

Source	**What you are looking for**
Check the Companies Register (if the company is registered)	Are they a company director or company officer? Are they involved in other companies that may provide relevant skills and knowledge? How can they apply this to their charity role?
Check the Charities Register (if they are registered)	Are the contact details under "contact and trustees" up to date?
Charity website	Are they profiled on the website? What is their stated role?
LinkedIn	What experience do they have? What roles do they have? What knowledge and skills do they have? How can they apply this to their charity role?

Created by Gary Metcalfe CMgr, FCMI, FICCranfield Trust Volunteer Management Consultant
1st June 2020.