

Improvement Skills Consulting in the Third Sector

I've been consulting in the Third Sector since 2004 and have also provided pro bono support to 12 different organisations. This work has included developing business plans, re-designing services and implementing performance measurement systems. It has also included support such as running training workshops, facilitating away-days and providing one-to-one coaching and mentoring to trustees, directors and staff.

Some of the organisations I have worked with:

- Marie Curie Cancer Care
- Julian Support
- Rory Peck Trust
- Media Legal Defence Initiative
- BBC World Service Trust/BBC Media Action
- Participle
- The Officers' Association
- Community Action Southwark



“Third Sector” is a much used and much misunderstood term. It lacks a universally accepted definition and the sector has rather fuzzy edges. So what do we mean by the third sector? At its simplest it encompasses any organisation that is neither public sector nor private sector. It includes **voluntary and community organisations** (including registered charities, associations, self-help groups and community groups), **social enterprises, mutuals** and **co-operatives**. All these types of organisations have three distinguishing qualities:

- they are operationally independent of government;
- they are “value-driven” – motivated to achieve social aims; and
- they reinvest surpluses in pursuit of these social aims.

Many of the needs of Third Sector organisations are similar to those of private or public sector organisations, although sometimes the terminology used is different and some disciplines (such as fundraising) are particular to the sector.

I have 10 years' experience of working with Third Sector organisations and understand the challenges facing them and their distinctive and varied cultures. I know that the sector is diverse; in many ways this is its strength. I also bring detailed understanding of the public and private sectors to help develop innovative solutions for my Third Sector clients.

On the following pages you will find a summary and examples of the range of support I can provide to Third Sector organisations. [Read my Third Sector Blog posts here.](#)

Strategy and business planning



All effective organisations (whatever sector they are in) need a clear strategy and sound business plans. All too often strategy development and business planning are seen as being about the product - a document that frequently is left to gather dust on a shelf. Additionally, the planning processes involved often take up too much time.

A strategy is a plan with a rationale.

It is the strategy development and planning process that builds shared understanding of the organisation's goals and how it will go about achieving them. It is the process that builds trust, ensures the right voices are heard and stimulates innovative ideas.

I have provided support that has ranged from expert facilitation, through to engagement with staff and trustees, depending on the organisation's needs and the resources available.

Case Study

The Challenge: A newly-formed charity, operating to support “freedom of speech” clients overseas, needed an Operations Plan to support the Trustees’ Strategic Objectives.

The Solution: I interviewed the Trustees to identify their views on the Strategy and objectives. I then worked with the COO to translate the Strategic Objectives into themes which could then be cascaded into 12-24 month operational objectives and clearly phased plans.

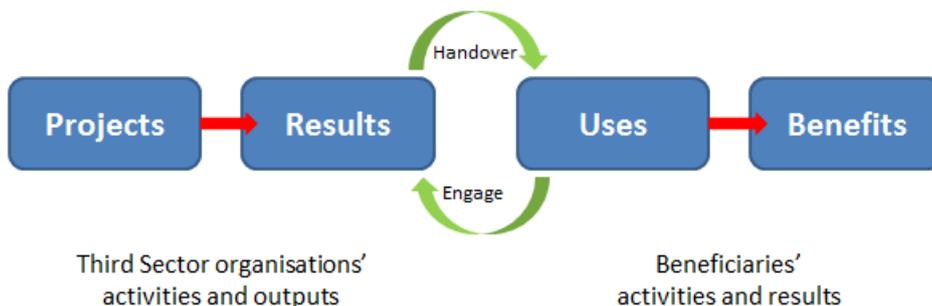
The Results: We created an Operational Plan that was signed-off by the Trustees. It clearly identified a number of resourcing gaps which the Trustees would need to address. It also included a performance measurement framework.

I've worked with clients' existing planning frameworks as well as helping them adopt established approaches such as the Balanced Scorecard. I'm not wedded to a particular methodology and recognise the need to ensure any framework fits with the organisation's needs and culture.

Impact measurement and reporting



Demonstrating the impact of the interventions and services provided by third sector organisations can be challenging. How do you show that it was your intervention that made the difference? What data should you collect? Which indicators show the desired impact? How reliable or helpful are social return on investment (SROI) approaches? Increasingly, funders of all types (including individual donors) want evidence of the outcomes/impact a third sector organisation has delivered – they want you to prove what difference you are making.



There are no short-cuts from Projects to Benefits, or from Results to Benefits – every successful Project MUST link via Results through Uses to Benefits.

Whether you want better internal performance information or you want to show your funders the difference you are making with their money, I can help.

Through my experience of helping a diverse range of clients to improve impact measurement and reporting, I can tailor support/advice to the specific circumstances your organisation faces.

I also have experience of helping charities set up Dashboard reporting systems using the Salesforce.com CRM system.

Case Study

The Challenge: A social enterprise delivering adult social care services commissioned by local authorities needed a measurement framework that it could use to report impact and demonstrate cost savings.

The Solution: I carried out a desk research exercise to identify the range of performance indicators being used in the Adult Social Care Services area, relevant to the services being offered by the organisation.

The Results: Working with the client's Measurement Manager, we distilled the list down into a manageable and balanced set of indicators which could be implemented. These are being used as the basis for reporting on service impacts and also when pitching for new business from commissioning Local Authorities

Income generation/fundraising



Sustainable income is essential for all organisations, in all sectors. The difference for many third sector organisations is that income generally does not come from the beneficiaries of their services/support. In challenging economic circumstances, in particular with sharp declines in public sector funding, most third sector organisations are experiencing challenges in raising funds.

*Donors don't give to institutions.
They invest in ideas and people in whom they believe.*

Working in partnership with Sho-Net Systems, we can design and implement an effective system for enabling effective management of fundraising.

Our approach enables an organisation to know their donors, how much they have given over time, when reports are due, and all the other questions that crop up from time to time, as well as targeting potential donors in fundraising campaigns.

We use process improvement software to capture how our clients wish to work and Salesforce.com software to track all interactions with donors, and provide progress reports.

Case Study

The Challenge: In a small media sector charity where everyone has to be flexible about their roles, there was a need to re-focus people and processes on strategy and income growth.

The Solution: I carried out a review of business processes and analysed how everyone in the team was spending their time. We re-designed roles and responsibilities to enable the Director to focus her time on Fund-raising and Strategy. With support from Sho-Net we implemented the Salesforce.com CRM system with performance metrics and reporting.

The Results: The revised processes and roles, plus CRM system has provided an effective way to manage relationships with donors and beneficiaries and provides up-to-the-minute performance reports on fundraising.



Service design and efficiency improvement



In a world where many third sector organisations are having to compete for funding, it is important to be able to keep costs under control and to demonstrate that services can be delivered effectively and efficiently.

Cost cutting is not a strategy for success. Being a low-cost, high quality, service provider can be.

I have worked with charities who need to reduce their costs of delivery and to design new service delivery models.

For all these client organisations the objective has not been to reduce staff costs, but to eliminate waste and therefore free-up staff time to focus more on supporting beneficiaries.

I adopt a team-based approach to engage staff in the design and re-design of current processes. By running “live mapping workshops” and “rapid improvement workshops” we are able to get high levels of staff engagement and support for process and performance improvements.

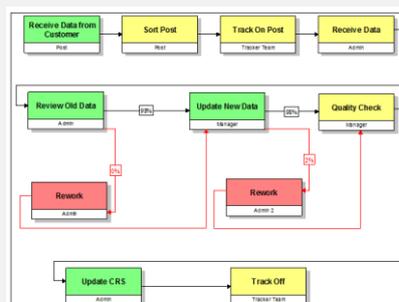
I can also help your organisation to create an online “intelligent operations manual” that defines how processes should work. This can be an essential tool for staff or volunteer induction and training.

Case Study

The Challenge: A regional charity providing support to people with mental health difficulties to help them lead independent lives needed to develop a new operating model for service delivery.

The Solution: I designed and facilitated a Clean Sheet Design workshop which involved key service staff and senior managers. We defined the success factors for the service including stretch targets for reduced service operating costs and created a new service delivery process, together with definitions of roles required to operate the service.

The Results: The outputs from the workshop were used to build a competitive bid for winning new services, together with a Transition Plan to give Commissioners confidence in the organisation’s ability to deliver as promised.



Change and project management



People don't resist change, what they resist is badly managed change. That is just as true in a charity as it is in a public or private sector organisation. Additionally, size doesn't matter! Change can be just as difficult to implement successfully in a 10 person charity as it can in a 200 person one.

*Most change programmes fail for one of two reasons: they either have passion without system, or system without passion.
You desperately need both.*

I have worked with charities to help them implement strategic change and also to carry out smaller-scale improvement projects.

This work has included running training workshops to build internal skills for change, facilitating away-days and providing one-to-one coaching and mentoring to trustees, directors and staff.

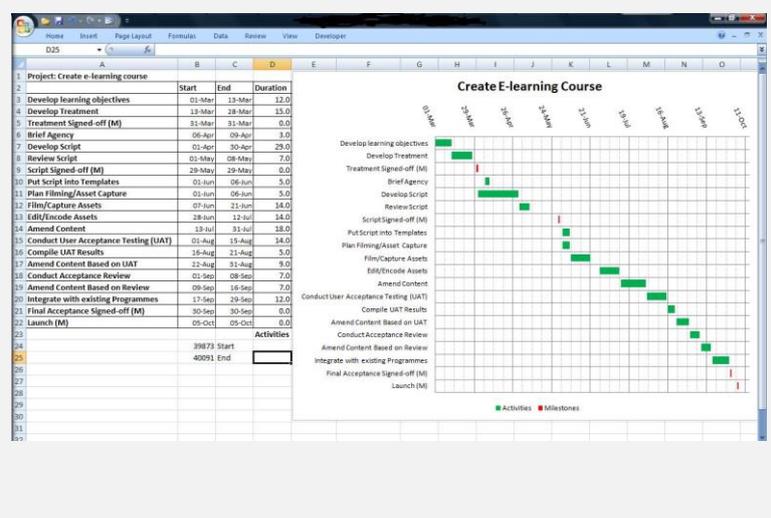
Project management is a key skill for enabling successful change. I have run workshops and facilitated project teams where the focus is "Project Management for real people"; not riddled with management jargon and certainly not all about filling in project forms and templates! I provide simple tools, with as much emphasis on the people side of projects as on the "technical" side.

Case Study

The Challenge: A UK-based charity operating overseas needed to develop the skills to run large-scale development projects with foreign partners and NGOs.

The Solution: I designed and ran several 2-day Project Management workshops tailored to suit the governance requirements of their projects. I also provided coaching and mentoring sessions for key staff, where they worked on their own "live" projects.

The Results: Staff developed their own action plans for individual projects and some over-arching Trust-wide project processes. They have also used the skills to coach their local partners in complex multi-cultural projects.



Additional areas of support to the Third Sector

In addition to my core services described above, I work with a network of Associates and Partners who can provide an extended range of capabilities. These include:

Governance and management



Effective governance and management is important for all organisations. It is the bedrock on which the culture, values and ethics of any organisation are built.

In the third sector, effective governance is all the more important and, of course, the rules are often different. With extensive experience of the sector we can offer advice on governance and management structures, effective boards, organisational processes, plus roles and responsibilities. Where required, we have partners who can provide specialist advice including legal, regulatory, HR and IT.

Collaborations and mergers



Diversity and independence are key drivers of success in the third sector. A strong sense of ownership from Trustees/Directors, staff, volunteers and even beneficiaries is often their key motivator. Equally working together can often achieve even more and help third sector organisations realise significant budgetary savings. Such collaborations take many forms: informal arrangements, consortiums, joint ventures, partnerships, shared services and in some cases can lead to full mergers.

Our team has extensive expertise in supporting third sector organisations develop effective collaborations. We can help you to decide whether a collaborative approach or merger could work for you and how best to go about implementing it; and we can help you avoid many of the common pitfalls in collaborative arrangements including how to retain your distinct identity and independence while collaborating with others.

Procurement and sub-contracting



Third sector organisations of all kinds need to buy services and supplies, and they increasingly work with other organisations (across sectors) to deliver services to beneficiaries. However, the skills required to get the best value out of these purchasing or sub-contracting relationships are a scarce resource in any sector and often not seen as core skills for third sector employees.

Are you convinced that your organisation and your beneficiaries are getting the best value from procurement and sub-contracting? If not our expert team can help you through consultancy and training support to help you get the best possible results for the best possible price.

Marketing, communications and campaigns



Organisations in all sectors need effective communications and marketing, but the growing use of social media channels can make this a minefield for the unwary. Third sector organisations generally need effective marketing and communications to raise funds and/or to raise awareness of their cause (advocacy). This can take the form of specific campaigns or be a more continuous activity. Either way, we can help you to improve the way you identify and segment your audiences and then design and deliver effective campaigns. Our experience across sectors means that we can bring new approaches to your organisation whilst being sensitive to your distinct values, culture and ethics.

Consultation, participation and engagement



A key point of differentiation for third sector organisations is that they have their finger on the pulse of local community needs and aspirations. Keeping in touch with what your community wants is increasingly difficult. We can help you with advice and support on cost-effective consultation mechanisms and ways to encourage people to participate and engage in your organisation and its work.

We can also support you with research and needs analysis to support your funding cases and to help inform the development of your offer to your communities. This can range from conducting bespoke research to supporting you to undertake your own feasibility studies.

Charity finance



While many of the skills and much of the knowledge required to run effective charity finances are common to all sectors, charities have distinct rules and needs which can often be bewildering, particularly for smaller charities. Our team has particular expertise in charity finance, the rules and good practice.

Volunteering



Recruiting, retaining and managing volunteers to secure the best possible results for beneficiaries is a challenge many charities and voluntary/ community organisations face on a daily basis. Our team can help you to make the best use of volunteers, manage them effectively, recruit and retain volunteers and avoid many of the managerial and legal pitfalls associated with volunteering.

About Improvement Skills Consulting Ltd.

Improvement Skills Consulting Ltd. was established in 2007 by Ian Seath who has consulting experience going back to 1990 (and internal consulting and facilitation prior to that). Ian has worked with more than 200 clients and helped implement a wide range of approaches to improve customer satisfaction, reduce process cycle-times, drive out waste and actively engage staff in continuous performance improvement.

Ian's experience covers the private, public and voluntary sectors and he has worked with Boards, Managers and Front-line Staff. He works as a Coach, Facilitator, Project Leader and Trainer.

As with many specialist consultancies, we don't claim to be able to "do everything". Therefore we work in partnership with other consulting and technology organisations. This enables us to build a tailored and flexible resource to meet a wide range of client needs.

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