

CAN expert advice and support April 2022-March 2023



Highlights

Last year we provided expert support to 132 groups on a one-to-one basis in the BCP area - enabling them to deliver essential work in their community and reduce health and care inequalities.

- 97% were very satisfied and 3% satisfied with our service.
- 97% would recommend our service to friends or colleagues
- 91-100% said the work improved their governance, management, quality, sustainability and growth

The most common areas of advice and support were:

- general management and governance (36%)
- constitutions/setting up (32%)

We're always striving to do more. As a result of the feedback we'll be:

- helping groups better describe the benefits and positive outcomes of their work, through a series of training, advice and support
- further developing our Membership Zone to allow more self-service and provision of more templates and tool kits
- proactively contacting groups post our support to check in on their progress

Overall groups greatly appreciate the support given and can clearly articulate that it makes a positive difference, is invaluable and needs to continue. A group told us "They [CAN] are an essential service to this community in BCP area. We would not be able to do such a wonderful job without them in place."

Summary

This is a report of the advice provided to groups across Bournemouth, Christchurch and Poole by the Senior Advisor (Steve Place). Over the year we provided advice and support to 132 groups, averaging 2.8 hours per group. Of these groups about a sixth were newly forming and 73% were small groups with annual incomes of under £100,000 (similar to previous years). Just under a third provide services meeting health and wellbeing needs and 6% were focused on ethnically diverse communities (both similar to previous years). About 45% of new contacts found out about the service through word of mouth, and 12% through BCP Council. Internet leads remain minimal (only one new contact) and so we should check on website optimisation.

The most common areas of advice and support were general management and governance (36%), and on constitutions/setting up (32%). The most common changes groups experienced from the service were improved governance (32% of groups), improved management and procedures (29%), and organisation set up (24%). As a result of the work six became registered charities or CICs. When

specifically asked if the work had helped their organisation to improve its governance, management, quality, sustainability and growth responses were:

- 100% said yes to governance with 88% saying a great deal or a lot
- 97% said yes to management with 76% saying a great deal or a lot
- 97% said yes to quality with 74% saying a great deal or a lot
- 91% said yes to sustainability with 61% saying a great deal or a lot
- 94% said yes to growth with 59% saying a great deal or a lot

A vast majority of groups reported that the advice work had improved their governance, management, quality, sustainability and growth, with an increasing percentage of groups reporting this compared to last year. It is impossible to attribute changes just to the work of any one source of advice and support, therefore groups were asked to estimate CAN's contribution to any such change. CAN has very significantly helped most groups to increase their skills and knowledge (51%-75% contribution). We have also significantly helped (26%-50% contribution) them to collaborate more, increase and sustain their services. We have contributed well to increasing funding for half of groups. Although most groups believe we have helped them to increase their number of users and volunteers it was less of a contribution (1%-25%).

This year has been another busy one for the Advisor. A similar number of groups have been supported, the breakdown and areas of advice are very similar to previous years, although employment was less (perhaps due to our regular HR webinars). As last year there were more new contacts with existing groups which is probably a result of CAN becoming better known and increasing our membership. The service continues to benefit newly forming groups and smaller existing ones, with good representation of ethnically diverse groups. Although about a fifth of the work is with new groups many decide not to set up as a voluntary/community organisation or at all. This is a valuable aspect of the service in helping people make a considered decision about setting up.

Groups could clearly articulate the differences made to their organisations and usually related to being a more efficient, effective and sustainable organisation which would automatically lead to better outcomes for those they work with. Group were less able to describe the benefits for their beneficiaries, but this is improving each year. We will be looking at developing resources and training to help groups improve this skill.

Overall, 97% of groups were very satisfied and 3% satisfied. Most (97%) would definitely recommend it to a friend or colleagues. We will improve the service by developing the Members Zone to allow more self-service and provision of more templates and tool kits. Also programming check ins will be stated in the coming year. Groups appreciate the support given and can clearly articulate that it makes a positive difference, is invaluable and needs to continue:

“They are an essential service to this community in BCP area. We would not be able to do such a wonderful job without them in place.”

Detailed findings

In the figures below those in brackets refer to the previous year for comparison. In the 12 months the Adviser provided advice and support to 132 groups (2022:141)

through 559 interactions by phone, e-mail or face to face/virtual (2022:700). Groups over the year may have only had minimal contact (e.g. only one interaction taking up no more than 15 minutes) to two groups taking up about 40 hours of advice/support each across the year. The average for the 132 groups was 2.8 hours (2022:2.6).

Of the advice/support given the most common areas were:

- Management/governance – 36% of interactions (2022:25%)
- Constitution/set up/conversions – 32% (2022:36%)
- Financial – 7% (2022:10%)
- Health checks – 6%
- Business planning – 5%
- Funding – 4% (2022:2%)
- Safeguarding – 4% (2022:3%)
- Recruitment/employment – 3% (2022:11 %)
- Policies/procedures – 3% (2022:4%)
- Data Protection – 2% (2022:1%)

Generally the areas of advice/support sought by groups remains very much the same as in previous years with slight bounce back in management/ governance and funding (perhaps due to the Bounce Back project which was offering this specialist area of advice/support ending in June 2022) but with a significant decrease in recruitment/employment to previous levels.

Of the 132 groups:

- 23 (33) were new groups forming – 17% (23%)
- 20 (29) were new contacts from existing groups – 15% (21%)
- 88 (79) were existing contacts – 67% (56%)
- 122 (131) were based in Bournemouth, Christchurch and Poole – 92% (94%)
- 10 (9) were based outside BCP – 8% (6%)
- 40 (45) were engaged in health and wellbeing – 30% (32%)
- 8 (9) were ethnically diverse groups – 6% (6%)
- 31 were based in BCP Councils' priority wards – 23%
- 97 (108) had annual incomes below £100,000 – 73% (77%).

The makeup of the groups is very similar to previous years although perhaps fewer new contacts with existing and newly forming groups which is probably a result of CAN becoming better known and increasing our membership.

Of the 23 new groups 22 told us how they found out about CAN. Word of mouth was most common i.e. 13 groups, 59% of new contacts Next most common (4 groups, 18%) were referrals from others within CAN, perhaps as a result of more outreach in the area by other CAN staff. Other routes mentioned were BCP Council, BCHA and previous contact with CAN. This year no groups mentioned finding us online unlike previous years (about `10%) Survey results did not indicate that any group had any real difficulties in accessing the service although one person did say may have to wait for Steve to respond as recognise is very busy and someone else felt the Member's Zone could be developed to allow more detailed downloaded advice.

Of the 132 (141) groups 61 (79), 46% (56%) had received at least one hour of advice and support in total over the year. These were invited to complete a Survey Monkey

in April 2023 about the quality of the advice and any outcomes as a result. We had 34 returns, a 56% (54%) response rate.

When asked to say how their group had changed or developed as a result of the advice/support, responses can be categorised as:

- Improved governance including increase in number and more aware trustees, 32% (23%) of groups
- Improved management and procedures, 29% (23%)
- Organisation set up, 24% (27%) of groups of which 6 (4) became charities (NB some still in process of setting up)
- Growth, funding and sustainability, 15% (7%)
- Conversions (e.g. CIC to charity, unincorporated to CIO), 12% (11%) of groups
- Referrals to other voluntary/community groups, advice and support within and outside of CAN, 9%

“Really helpful start to my charity, especially the opportunity to ask questions to Steve, who was so experienced in these areas. Also the application charity pack.”

“Our community group has been able to a) receive funding and b) set up with a strong constitution and good governance as a result of CAN's advice. We have also been introduced to other organisations such as ICN and DREC with experience to share with us.”

“Following a successful lottery grant, Steve advised us what steps to take to create a successful lottery evaluation, e.g. how to compile surveys.”

“We have been able to smoothly change our team of trustees whilst being sure that we are compliant with the relevant regulations. We have just converted to a CIO which would not have been possible without the advice received.”

“We have grown as a charity under Steve Place’ s guidance and help at various stages when we needed advice.”

“We now feel more confident when preparing policies like the Safeguarding one Steve helped us with.”

Closure of groups is always to be expected but it is important that this is carried out in a legal and planned way. The Advisor each year helps groups with this and this year assisted 1 (5) group to do so.

Groups were then asked to identify what ways had the advice benefited their beneficiaries, i.e. those or the things their organisation is working to improve. As in past years most people talked about the impact on the organisation, not on their beneficiaries. Many felt that being a more efficient, effective and sustainable organisation would automatically lead to better outcomes for those they work with. Some said that it will lead to increased funding that would increase services and users. For those that did mention specific benefits the most common were more and improved quality services. Three groups felt it was too early to say as they were newly formed. All these were very similar comments to previous years.

When specifically asked if the work had helped their organisation to improve its governance, management, quality, sustainability and growth:

- 34 groups, 100% (98%) said yes to governance with 88% (84%) saying a great deal or a lot

- 33 groups, 97% (93%), said yes to management with 76% (70%) saying a great deal or a lot
- 33 groups, 97% (89%) said yes to quality with 74% (70%) saying a great deal or a lot
- 30 groups, 91% (86%) said yes to sustainability with 61% (55%) saying a great deal or a lot
- 30 groups, 94% (82%) said yes to growth with 59% (54%) saying a great deal or a lot

Groups were asked to explain their response. Here are a few examples:

“We have opened our coffee lounge as a sustainable enterprise alongside our charity. CAN and Steve Place in particular have helped us in lots of ways, offering training, support and individual help. He is very helpful with the trustees and governance.”

“We are still in the process of finalising our organisation, we could not have done this without the skill and expertise from Steve, he has been a welcome font of knowledge and a great support, we have been so impressed and very grateful for all the help advice and support we have had , invaluable, so thank you.”

“I did not know how to do spread sheet and I didn't know all the dos and don'ts of running a charity. I feel I can be a better manager now.”

“We were struggling to become a registered charity. Steve helped us achieve registered status.”

“Steve reviewed our current structure, practices, policies and procedures and provided many useful pointers for improvement and areas for focus.”

When asked for any specific changes in the organisation the following responses were given by 32 groups:

1. **Our skills and knowledge has increased**, 30 groups, 100% (100%). 26 groups, 100% (100%), said this was because of CAN, with an average contribution to the changes of between 51-75%.
2. **We have more users** 19 groups, 66% (54%). 15 groups, 83% (45%), said CAN helped with an average contribution to the changes of between 1-25%.
3. **We are collaborating with other groups** 19 groups, 66% (66%). 14 groups, 74% (67%), said CAN helped with an average contribution to the changes of between 26-50%
4. **Our services have been sustained** 17 groups, 61% (73%). 11 groups, 73% (65%), said CAN helped with an average contribution to the changes of between 26-50%.
5. **We have more volunteers** 16 groups, 53% (41%). 14 groups, 82% (48%), said CAN helped with an average contribution to the changes of between 1-25%.
6. **Our funding has increased** 15 groups, 52% (32%). 9 groups, 53% (42%), said CAN helped with an average contribution to the changes of between 26-50%.
7. **We have funding from more sources** 14 groups, 52% (46%). 11 groups, 61% (39%), said CAN helped with an average contribution to the changes of between 1-25%.

8. **We are delivering more services** 13 groups, 45% (45%). 10 groups, 71% (39%), said CAN helped with an average contribution to the changes of between 26-50%.
9. **Our funding has been sustained** 11 groups, 38% (49%). 5 groups, 36% (45%), said CAN helped with an average contribution to the changes of between 1-25%.

Looking at the changes it suggests that most groups have seen an improvement, or maintenance, in their activity. There are more groups than last year seeing an increase in users which reflects other statistics that many groups have seen an increase in demand. However, funding is not showing a similar increase but the number of volunteers is. This may reflect the increasing pressure on frontline groups to do more with the same or even less. These changes may be due to the action of others or circumstances, not just CAN. Therefore, by asking groups to estimate what contribution CAN has made to these changes we can better assess our impact. CAN advice and support has contributed to increasing skills and knowledge, collaboration, volunteering and sustaining services for more than half of groups. There has been an increase in our contribution towards funding which probably reflects the Bounce Back programme last year and the subsequent appointment of a Funding Adviser. For all other changes CAN had contributed towards them for at least 38% of all groups. Our level of contribution is usually between 25 and 50%.

When asked how satisfied groups were with the service:

- Very satisfied, 97% (86%)
- Satisfied, 3% (11%)
- Not satisfied, 0 (1 group, 2%)

When asked if any of the assistance had been unhelpful no one gave any examples. Groups were asked how likely is it that they would recommend the advice service to a friend or colleague. 97% (91%) would definitely do so and 0% (0%) not.

A final question asked for any other comments respondents wanted to make to enable the CAN to develop its services. 10 groups, 29%, took the opportunity to do so. Comments on improvements included:

“More visibility of all the great services CAN provides. There is so much, and it would be great to have an interactive/self-serve/automated element of CAN's services on their website.”

“Follow up check ins”

“Easy access to online policy templates?”

Half of the comments believed that CAN and the advice service was invaluable and needed to continue:

“They are an essential service to this community in BCP area. We would not be able to do such a wonderful job without them in place.”

Conclusion

This year has been another busy one for the Advisor. A similar number of groups have been supported, the breakdown and areas of advice are very similar to previous years, although employment was less (perhaps due to our regular HR webinars). As last year there were more new contacts with existing groups which is probably a result of CAN becoming better known and increasing our membership. The service continues to benefit newly forming groups and smaller existing ones,

with good representation of ethnically diverse groups. Although about a fifth of the work is with new groups many decide not to set up as a voluntary/community organisation or at all. This is a valuable aspect of the service in helping people make a considered decision about setting up.

Word of mouth is still the most common means of groups finding out about the service. Referrals from within CAN have increased, probably because of the growth in CAN staff, many of whom will be out in the community. Internet leads are still very minimal and so we should check on website optimisation.

Groups could clearly articulate the differences made to their organisations and usually related to being a more efficient, effective and sustainable organisation which would automatically lead to better outcomes for those they work with. Groups were less able to describe the benefits for their beneficiaries, but this is improving each year. This weakness is something that some funders find as a weakness in funding applications, that many groups cannot explicitly articulate the difference their group's work makes. We will be looking at developing resources and training to help groups improve this skill.

A vast majority of groups reported that the advice work had improved their governance, management, quality, sustainability and growth, with an increasing percentage of groups reporting this compared to last year. 88% said that CAN had improved their governance a great deal or a lot, 76% said it improved their management and 74% quality. About 60% said it had improved their sustainability and growth. It is impossible to attribute changes just to the work of any one source of advice and support, therefore groups were asked to estimate CAN's contribution to any such change. CAN has very significantly helped most groups to increase their skills and knowledge (51%-75% contribution). We have also significantly helped (26%-50% contribution) them to collaborate more, increase and sustain their services. We have contributed well to increasing funding for half of groups. Although most groups believe we have helped them to increase their number of users and volunteers it was less of a contribution (1%-25%).

The advice service continues to receive very high satisfaction scores. We will improve the service by developing the Members Zone to allow more self-service and provision of more templates and tool kits. Also programming check ins will be stated in the coming year. Groups appreciate the support given and can clearly articulate that it makes a positive difference, is invaluable and needs to continue.

Steve Place, September 2023