

# Paul Hamlyn Foundation

Fitter for Purpose:  
Evaluation report

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*This report summarises the learning from the Paul Hamlyn Foundation's Fitter for Purpose programme. It draws on information from the project documentation, a survey of grantee project leads and the reviews undertaken 6 and 18 months after the projects' completion. It provides an account of the Fitter for Purpose programme delivery, the main impacts of the programme and the lessons that PHF can learn to inform future organisational development approaches.*

*The author would like to thank the project leads from the participating organisations who gave their time to provide feedback on the programme, and the staff, volunteers and trustees who were involved. Particular thanks are due to Donald Ritchie for his insight and generosity in sharing his reflections, as well as to NCVO and the other consultants.*

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## Executive summary

The Fitter for Purpose (FfP) programme aimed to support 30 Paul Hamlyn Foundation (PHF) grantee organisations<sup>1</sup> to become more resilient in the context of the recession and public sector cuts. The programme was funded by PHF and delivered by the National Council for Voluntary Organisations (NCVO) over three rounds, starting in September 2012. Grantee organisations, selected by PHF, were invited to apply to the programme; those who chose to participate submitted a project proposal which was developed or amended through a scoping and diagnostic discussion with an NCVO consultant. Once agreed, the projects were delivered over a period of approximately 6 months, with follow-up discussions between the grantee project lead and a consultant undertaken 6 and 18 months after the projects' completion.

At the time of FfP, PHF had three main grant funding programmes in the UK: Arts, Education and Learning, and Social Justice. Grantee organisations from all three programmes were invited to participate, and 28 completed FfP: 11 Arts, 10 Education and Learning, and 7 Social Justice.

This evaluation draws on information from the projects' documentation, an online survey of the participating grantee project leads conducted at the end of each project, and the reviews undertaken 6 and 18 months after the projects' completion. During the programme there were a number of moments of reflection by PHF and the NCVO consultants to capture formative learning about the work, and these learnings are also included.

### Key findings

Overall the approach worked well for the majority of grantees and was appropriate for a range of organisations. All the grantee survey respondents agreed that the time and effort they had put into the programme was worthwhile.

All grantee respondents identified some benefits from the programme, and the vast majority agreed that as a result of the programme they had a better understanding of the problems they were working on, a clear plan of action, more confidence to make the changes required and broad agreement about what to do next.

Key strengths of the programme design and implementation were:

- the amount and type of support;
- the time allowed for detailed scoping and diagnostic work;
- the dedicated time and space to engage with strategic issues;
- the quality and match of the consultants;
- the flexibility and tailoring of the programme to grantees' specific circumstances;
- the engagement of a range of people in the projects (trustees, staff and volunteers); and
- grantee ownership of the work.

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<sup>1</sup> Organisations that already had a live grant from the Foundation.

The main factors determining individual project success were the grantees' capacity to engage with the work, and the commitment from the people involved in the grantee organisations, particularly the project lead, but also trustees, staff and volunteers.

As well as the technical aspects of the programme input, grantees also identified benefits from the softer "moral support" and confidence boost that participating in the programme gave them.

Where the programme worked less well, this appeared to be for the following reasons:

- a lack of grantee capacity to engage with the work, which could be related to the size of the organisation, the timing or prioritisation of the work;
- a mismatch between the grantee and consultant or a sense that the consultancy was not sufficiently tailored to the grantee;
- a disrupted experience due to consultant turnover;
- lack of clarity about what information was being shared with PHF; and
- 'clunky processes', for example inflexible budgeting arrangements.

In addition, the most commonly mentioned recommendation to improve the programme was provision of follow-up or slightly longer-term support beyond the end of the initial 6 months. While there was scope to provide this support within the programme, grantees were not always aware this was available.

### **Learning and implications for the future**

The main implications for thinking about future organisational development programmes are:

- The importance of 'balancing' the power relationships between funder, delivery partner and grantee organisation. This may facilitate grantee ownership of the project while making space for reflection and the diagnostic process. The FfP approach appears to have been a relatively successful model; however, there remained some issues in supporting the consultants' relationship with the grantees and clarity around lines of feedback to PHF.
- Different delivery arrangements will have implications for resourcing and relationships. In this case, using a single provider brought some advantages: it allowed for efficient allocation of consultants to projects, in most cases achieving a good match and relatively efficient programme administration arrangements. Using multiple delivery partners might bring additional benefits in some areas, such as greater flexibility or diversity in the support offer, but also costs in terms of PHF management time.
- The key issues of grantee capacity and ownership of the work should be built in from the design of the project and consideration given at all stages to ways that these can be supported and maximised. Examples might include:
  - inviting participation;
  - clear articulation of the commitment and what can be expected;
  - ways to engage all the key stakeholders and ensuring the project has the right lead;
  - flexibility in the timing of support to fit with competing commitments;
  - having a single lead consultant who briefs others to save time; and
  - additional resourcing for some grantees to support the activities required.

# Evaluation report

## 1. Background: about Fitter for Purpose

The Paul Hamlyn Foundation<sup>2</sup> was established in 1987 and is one of the largest independent grant-making foundations in the UK. During the main period of the Fitter for Purpose (FfP) programme (2012–2015), the Foundation funded three main grant programmes in the UK, focusing on the Arts, Education and Learning, and Social Justice. Grants made during this period generally lasted for between one and three years (mean average 24 months), and could vary in value considerably, with the median average grants awarded ranging from £75,000 in 2012/13 to £95,000 in 2014/15.

The Foundation developed the FfP programme in 2012, in response to concerns about the sustainability of grantee organisations in the UK that were affected by the recession or public sector cuts. It was part of a two-pronged approach, with resilience funding being awarded to organisations facing an imminent crisis. The intention with FfP was to support grantee organisations in becoming more resilient and so protect against them reaching a crisis point.

The desired impacts of the programme were that:

- organisations are run more efficiently and effectively; and/or
- organisations are more financially sustainable into the longer term; and/or
- organisations maximise their impact, for beneficiaries and within sectors.

The programme was designed for non-statutory sector grantees<sup>3</sup> with a turnover under £2m that were not already in receipt of an organisational development grant. The Foundation made a selective invitation to apply to the programme, targeting grantees with the potential to develop. Appendix 2 provides further detail about the programme design.

FfP was co-designed with the Foundation's delivery partner, the National Council for Voluntary Organisations (NCVO), and was launched in September 2012. Awards were made in three rounds up to May 2013, and in total 30 grantees participated in the programme. The projects were designed with two distinct stages: a diagnostic and project planning stage, and then delivery of bespoke support to address the agreed needs of the grantee. Both stages were due for completion within 6 months. Following the work, the evaluation phase included two follow-up conversations with each grantee, which took place 6 months and 18 months after the projects' completion.

During the evaluation phase, grantees could request a small amount of additional resource to support their continuation work. In the event, only a couple of grantees requested this support. It is not clear whether organisations were always aware that this additional resource was available.

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<sup>2</sup> Hereafter referred to as PHF or the Foundation.

<sup>3</sup> In this report 'grantees' is used to refer to organisations holding a grant from PHF; in some instances, it also refers to individuals within these organisations.

No direct funding was provided to grantees. The value of NCVO's support was capped at £10,000 per project; the average cost of the consultancy per project was just under £8,000<sup>4</sup> (this excludes PHF staff costs and all programme management and evaluation costs).

## 2. Evaluation approach and objectives

The evaluation of the programme had elements that were both formative and summative. To inform the programme implementation a learning day was held in May 2013. This included a review of the programme's processes, following which some small simplifications were made.

To capture information about the perceived impact of the programme, the grantee project leads were asked to complete a post-project online survey, which sought both quantitative and qualitative feedback.<sup>5</sup> Further information was gathered through the 6- and 18-month follow-up discussions between the participants and an NCVO consultant. These conversations followed a structured template. A summary of each conversation was written up by the NCVO consultant, agreed with the grantee project lead and then shared with the Foundation. In addition, the project documentation resulting from the diagnostic and scoping stages and the delivery of the work was also used to provide further detail about the activity as well as the wider context.<sup>6</sup>

The information gathered from these sources was analysed<sup>7</sup> to address the following questions:

- Did the programme help participants become 'Fitter for Purpose'?
  - Did the programme identify genuine capacity-building needs?
  - What were the outcomes and achievements for participants and their beneficiaries?
  - What was the scale and extent of the programme's impact?
- What were the strengths and weaknesses of the programme, and what other factors affected its success?
- Did the programme represent 'good value' for participants and for PHF?
- What can be learnt from the programme about how to support grantees' organisational development in the future?

The evaluation was resourced and conducted by PHF with support from the project consultants. This approach means that there may be more bias in the data than would be the case if the evaluation was independent, as grantees may have felt uncomfortable providing negative feedback to a funding body or the delivery partner. During the evaluation, efforts were made to mitigate this bias, for example by emphasising the Foundation's interest in learning about the programme and the value of honest feedback. The evaluation activity was also run through a separate team at PHF, rather than through the normal grant relationships. In spite of these efforts, this potential bias in the data should be borne in mind when reviewing the findings.

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<sup>4</sup> The consultancy cost includes NCVO time to undertake the 6- and 18-month review conversations. This estimate relates to the actual spend, split between the 28 completed projects.

<sup>5</sup> A summary of the questions asked in the survey is provided in Appendix 3.

<sup>6</sup> A table summarising the programme participants in each round and the data sources used in this analysis is included in Appendix 1.

<sup>7</sup> The data were coded and thematically analysed using NVivo, a qualitative analysis software package.

### 3. Formative evaluation: adaptations to the programme design and implementation

A programme learning day was held in May 2013 to explore how the work had gone so far and what adaptations should be made for the remaining projects (some from round 2 and most of round 3). PHF and NCVO staff involved in FfP participated, and the event mostly explored process learnings, as it was too early to consider impact. A number of key points were discussed, resulting in some adaptations to the approach:

- The scoping and diagnostic work was felt to be of value to grantees in its own right. More time was agreed for this stage of the projects.
- The value of project planning and contracting between the delivery partner (NCVO) and grantees was underestimated. This was felt to be important in order for grantees to fully buy in and commit to the proposed organisational development, and also to build a working relationship with the consultants.
- The three-way relationship between PHF, NCVO and the grantee was complex and raised issues of trust and confidentiality. The original process, where PHF approved a project plan and gave a second authorisation for the delivery stage, was scrapped in favour of making a single award for the project at the outset.

Subsequently, there have been a number of review meetings between PHF and the consultants and within the consultant delivery team. The learnings collated through these discussions and analysis of the programme documentation and survey are considered at the end of this report.

## 4. Findings

### 4.1. Did the programme help participants become 'Fitter for Purpose'?

Of the 30<sup>8</sup> grantee organisations that started FfP, 28 completed the programme, and these all identified some level of benefit from the experience. For some organisations their FfP project made a substantial difference across a number of areas of their business, while for others the impact was narrower or more muted. The reasons for the different extents of the programme impacts include a number of interactions between how, and how well, the project was delivered; the type of issues that the project addressed; wider contextual factors, including the withdrawal or increase of funding; and grantee factors, such as the capacity of the organisation to engage with the work. The types of impacts that FfP achieved and in what circumstances are discussed in more detail below.

Two<sup>9</sup> organisations did not complete the programme: one of these did not engage with the scoping work, and the other disengaged from the programme after the scoping stage. In round 1 there were several attempts made to adjust the approach and to re-engage the grantee. The reasons for the disengagement are not entirely clear. However, it appears that there were several issues that may have contributed, including a communication mismatch between the organisation and the consultant and other concurrent issues that required the organisation's attention. Following round

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<sup>8</sup> There was one additional organisation that was invited and applied to the programme but was found to be ineligible, due to its annual turnover, prior to starting.

<sup>9</sup> There were two organisations that started but did not complete the programme: one in round 1 and one in round 3.

1, the process for reviewing and terminating projects that were not working well was tightened up so as not to waste resources.

#### 4.2. Did the programme identify genuine capacity-building needs?

In the online survey, grantee project leads were asked about the extent to which FfP met their organisation's needs. The response was broadly positive: out of 27 respondents<sup>10</sup>, 23 (85%) "strongly agreed" that the issue FfP worked on was "very important to the future of our organisation", and the remaining 4 (15%) "somewhat agreed". Evidence from the 6-month reviews suggests that almost all of the grantees had continued the work started during the programme, further demonstrating that grantees felt the issues were important.

Evidence from the project documentation suggests that the proposal development and scoping work was a critical stage in the process. It allowed grantees an opportunity to test their ideas about what were the most important issues and provided the time to explore and clarify what might be realistically achieved within the scope of the programme. In several instances the scoping work resulted in moving the project focus to address strategic rather than tactical issues. A number of grantees also reflected on the value of this scoping work in the post-project survey:

*"the FFP consultation process provided us with an initial high level discussion as to what we wanted to achieve...Having this overview was very important in helping us to focus." [grantee, survey]*

However, one grantee felt that the scoping work was the least helpful aspect of the programme, and suggested that to save time *"we could have been offered a menu of support e.g. non-managerial supervision and training/strategic planning workshop for staff and management committee"*. [grantee, survey]

For many of the grantees, the move to focus on more strategic issues was valuable, and many reflected on the helpfulness of having clarified strategy, vision and values, particularly during the 18-month reviews. For the majority of grantees, the balance between strategic and more tactical support appears to have been appropriate, while a small number of grantees suggested they would have valued some further practical support.

*"It enabled us to reflect with the whole team and to analyse what would be the appropriate future vision. The techniques that we were given to look at our work will help us move on." [grantee, survey]*

*"It gave us a framework and toolkit for evaluating our work which will improve the relevance, consistency and quality of our evaluation activities for some years to come. There is now a lot of work for us to do to implement this framework ... but we know what we need to do and we are vastly further forward in making practical and coherent progress." [grantee, survey]*

*"Overall I feel that we enjoyed moral support through the Fitter for Purpose programme ... through the consultancy sessions individually, as a staff group and with our proto-board. Whilst being valuable I wonder if this could be balanced with more practical support, assisting us in making things happen." [grantee, survey]*

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<sup>10</sup> One grantee that had completed the programme did not respond to the online survey; however, this grantee did provide feedback through the 18-month review.

### 4.3. What were the programme's outcomes and achievements?

FfP supported grantees to undertake a range of activities, resulting in a number of outputs and outcomes around organisational development. When thinking about the programme's achievements, it is important to remember that the vast majority of the work was delivered by the grantee organisations themselves. The programme provided a focus, built confidence and in many cases acted as a catalyst for change. Drawing on evidence from the project documentation and the grantee survey responses, the main organisational outcomes included:

- increased clarity and agreement around strategy and direction;
- greater understanding of approaches to developing financial sustainability;
- stronger governance arrangements;
- increased understanding of their organisation's impact and improvements in the ability to evidence it; and
- greater confidence in pursuing organisational development activities<sup>11</sup> and communicating their work.

In addition, a smaller number of grantees were supported in:

- evolving or changing their organisational structures;
- delivery of a specific project or output; and
- communications and marketing work.

It was commonly the case that grantees achieved multiple outcomes from their participation in the programme, in most instances two. In a few instances the changes were so substantial that they impacted across a number of areas.

Grantees were asked about their perceptions of the programme's results for their organisation, in terms of their understanding of the problem, their plan for action, their confidence to make changes and the level of agreement as to what to do next. These results are summarised in Table 1. In all cases the responses showed broad agreement that the programme had delivered benefits, with at least 89% of the respondents agreeing.

**Table 1. Grantee perceptions of the results of the programme, n=27**

<i>As a result of the work with NCVO on the Fitter for Purpose project:</i>	Strongly agree		Agree somewhat		Neither agree nor disagree		Disagree somewhat		Strongly disagree	
	<i>n</i>	%	<i>n</i>	%	<i>n</i>	%	<i>n</i>	%	<i>n</i>	%
We have a better understanding of the problems we were working on	18	67%	7	26%	2	7%	0	0%	0	0%
We have a clear plan of action	14	52%	12	44%	0	0%	1	4%	0	0%
We have the confidence to make necessary changes	12	44%	13	48%	2	7%	0	0%	0	0%
People in our organisation are in agreement about what to do next	13	48%	11	41%	3	11%	0	0%	0	0%

<sup>11</sup> 'Organisational development activities' might include development of strategy, funding or income development, marketing and communication activities, development of impact and monitoring processes, and IT systems development.

The themes of clarity, purpose and confidence were common in the grantees’ open responses about the programme’s impact:

*“The impact of this project was invaluable, it has led to us making necessary and challenging strategic decisions. It has enabled us to gain focus and take our work in the right direction in a sustainable manner on the right trajectory.” [grantee, survey]*

*“We have much more confidence in our ability to articulate our core vision and mission (i.e. to get on paper what we know/believe/value as an organisation) – and in light of this have been able to put a very focused plan in place for the next few years.” [grantee, survey]*

*“This endorsement of our product, validation of what we do, was helpful in that it bolstered our determination to get on with it and try to make more of what we had.” [grantee, survey]*

However, while the programme supported the vast majority of grantees to agree their direction and plans, one grantee noted that when this had not happened, it was sorely missed:

*“The experience was very good, it would just have been helpful to have produced a clear plan upfront of what was going to happen when so that everything would’ve taken place and led to the desired outcome ... The frustrating thing about the experience is that we seem so close to success and yet still so close to the edge.” [grantee, survey]*

Grantees were also asked about their expectations for the longer-term impact of FfP; again these results were broadly positive and are summarised in Table 2. The majority of grantees agreed that they expected their organisation to be more efficient, effective, influential and financially sustainable as a result of FfP.

**Table 2. Grantee expectations of impacts in 18 months’ time, n=27**

<i>In 18 months time, as a result of the Fitter for Purpose work, I would expect our organisation to be:</i>	Strongly agree		Agree somewhat		Neither agree nor disagree		Somewhat disagree		Strongly disagree	
	<i>n</i>	<i>%</i>	<i>n</i>	<i>%</i>	<i>n</i>	<i>%</i>	<i>n</i>	<i>%</i>	<i>n</i>	<i>%</i>
More efficient	4	15%	13	48%	9	33%	1	4%	0	0%
More effective	7	26%	16	59%	4	15%	0	0%	0	0%
Be more influential in our sector	7	26%	16	59%	4	15%	0	0%	0	0%
Be more financially sustainable	7	26%	12	44%	7	26%	1	4%	0	0%

While the evaluation plan had originally intended to report information about the difference made for beneficiaries, this has proved difficult. In all instances any changes in the beneficiary experience have been affected by a range of broader factors, relating both to other activities by the grantee and, more importantly, to their own individual circumstances.

The limited evidence that has been gathered about beneficiary impacts is drawn from the post-project survey. Grantees were asked for their views on whether in 18 months’ time as a result of FfP the organisation would have improved outcomes for beneficiaries. From the 27 responses, 9 “strongly agreed” (33%), 12 “somewhat agreed” (44%) and 6 “neither agreed nor disagreed” (22%). No respondents disagreed with the statement. Given the difficulties in attributing any impacts in such a complex system, the remainder of this report deals with the impacts on the grantee organisations themselves.

#### 4.4. What was the scale and extent of the programme's impact?

As described above, the programme's outcomes were relatively diverse and affected grantees to different extents. Drawing on the information in the project documentation, the grantee surveys and consultants' reflections, it has been possible to identify a group of grantees for whom the FfP impact could be described as 'considerable'. This is where the project seems to have catalysed a lot of change, and could be applied to around one-third of the 28 grantees.<sup>12</sup> Evidence from the programme documentation suggests that the timing being 'right' and the presence of an engaged and motivated project lead were key to these grantees' success.

*"There are many things that the Fitter for Purpose programme has enabled us to do that we could not have achieved otherwise. At the time that we applied, we were unsure about whether it was a top priority. However there have been immediate benefits, some – ongoing and others that will become apparent, but the main benefit is that it has allowed us to think more long term and strategically."* [grantee, 6-month review]

*"The Fitter for Purpose Project clearly exceeded the expectations of those involved with it. It provided a springboard to an organisation that was close to having to wind-up and, once funding was secured, it dearly needed this injection of skills and resource to kick-start the organisation and has provided much needed momentum, which the team has continued."* [consultant, 6-month review]

*"The CEO has put in place a more external facing approach to her role and this, in addition to the strengthened impact reporting has improved the reputation and perceived professionalism of the organisation. By way of example, there had been a threat of outreach work being cut, which would have had a significant impact on staffing, as [they] would have had to make the team redundant. Now they lead a consortium of six partners in this field."* [consultant, 6-month review]

It is interesting to note that nearly half of these grantees participated in the programme during round 1. There are a few possible factors that may have contributed to this pattern:

- 'Low-hanging fruit', or the grantees who were most ready for the programme and already had a strong relationship with PHF were selected and participated in the programme during the first round of the support.
- The design of the programme meant that the NCVO consultants had a relatively small caseload of grantees in round 1, which in conjunction with the 'newness' of the programme meant they may have received slightly more attention and energy than those in the latter stages.
- The lack of continuity in personnel meant that some grantees in rounds 2 and 3 had a more disrupted experience of the programme, which in some instances appears to have contributed to more muted impacts.

For one of the grantees, the programme surfaced some underlying issues around the organisation's leadership and governance. These issues proved challenging for the grantee to manage and resulted in considerable staff and trustee turnover. While it would not be appropriate to attribute all of this

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<sup>12</sup> This descriptor is based on an analysis of all the information available. In the 18-month reviews, project leads were asked to give a score out of 10 for the difference they felt their project had made to the specific area it was aiming to address and to the organisation as a whole. These scores have been taken into account as part of this analysis.

change to the impact of FfP, it is important to remember that a programme that aims to facilitate broad and strategic change will also require this process to be managed:

*“Changing the culture of the organisation has been the biggest challenge ... It is important to acknowledge that this kind of project will involve investment in culture change. Coaching or other support for the person leading this process could help to ease it.” [consultant, 6-month review]*

For other grantees, the programme supported the re-evaluation of relationships between staff and the board, and this led to positive changes in the ways of working, clarity and decision making.

#### 4.5. What were the strengths and weaknesses of the programme, and what other factors affected its success?

The evidence suggests that there were a variety of reasons for the programme’s different outcomes: some relating to the grantees themselves, some to the grantees’ context and some structural issues relating to delivery of the programme.

#### **Grantee factors**

The three factors that seem to have made the most difference in terms of the programme’s impact on grantees were:

- ‘timing’;
- their capacity to take on the work; and
- the presence of a committed lead for the project.

In addition, depending on the type of project activity, the degree of ‘buy-in’ from staff, volunteers and especially trustees could be an important factor in determining how the work progressed.

Grantee project leads were asked about the timing of the project in the post-project survey: 21 of the 27 respondents (78%) “strongly agreed” that FfP took place at the right time for their organisation, 4 (15%) “somewhat agreed” and there were 2 other responses. The open responses to the survey provided some more nuance to this broadly positive finding, and suggested that the issue of timing could have two elements. Firstly it was related to the grantee having a pressing issue that needed addressing, and secondly it was closely related to the issue of the organisation’s capacity to undertake the work.

*“Fitter for Purpose was timely for the organisation ... It gave us the necessary impetus to focus down on the issue of diversifying our income sources – something we had identified as a priority, but that without the discipline of FfP was at risk of being delayed.” [grantee, survey]*

*“We understood at the beginning that there would be a time commitment, but the impact of this did feel quite significant in terms of fitting in the rest of the workload. With hindsight it might have been better to schedule this work into a more quiet part of the year.” [grantee, survey]*

*“It was fortunate for us that the project took place at a time when we had a temporary (and very able) extra colleague in our small central team. This increased dramatically our capacity to respond to the work of the consultants and drive the project forward within the organisation.” [grantee, survey]*

This issue of grantee capacity was a key factor in determining the relative success or failure of the work. These issues were particularly pronounced for the smallest organisations – those with a single key member of staff – and it seems likely that this type of programme may not have been the most appropriate package for their circumstances. Having said that, these key individuals did gain personal support through the programme, which they might otherwise have struggled to access:

*“The timing for such small organisations is important. One of difficulties was getting enough of the trustees involved at the beginning and to get their buy in. I work on my own most of the time so it was particularly valuable and helpful to get an objective view.” [grantee, 6-month review]*

Even beyond these smallest organisations, capacity issues were frequently cited as problematic. It is not always clear whether this related more to the organisation’s prioritisation of the work against other activities or a genuine lack of capacity. A number of grantees noted the importance of setting realistic expectations about the time the work would take and also suggested gaining commitments from future programme participants to properly resource the work.

Finally, having a committed and engaged project lead driving the work comes through as another critical factor for the success of the project. It is notable in the post-project reviews<sup>13</sup> that where most progress had been made, this was commonly attributed to the individual driving the work forward.

### **Context factors**

A number of the grantees’ contexts changed considerably during the course of the programme, and these impacted either positively or negatively on their ability to engage with or continue the work. Examples included:

- Funding issues – different grantees experienced loss of funding and increase of funding during the programme. It was not always the case that the success of a funding bid enabled improved engagement with the programme; in some instances, it meant activity was diverted.
- Concurrent support programmes – there were a few examples where concurrent support facilitated greater change by the grantee.
- Change of premises.

In most instances, while these factors were important in achieving or limiting the programme’s impacts, they were issues that could not be reasonably predicted, and the same broad factors had different interaction effects for different grantees.

### **Programme factors**

The evidence suggests there are a number of key programme features that contributed to the broadly positive effects:

- the amount and type of support;
- the time allowed for detailed scoping and diagnostic work;
- the dedicated time and space to engage with strategic issues;

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<sup>13</sup> This includes the reviews undertaken at both 6 and 18 months after the projects’ completion.

- the quality of the consultants;
- the flexibility and tailoring of the programme to grantees' specific circumstances;
- the engagement of a range of people in the projects (trustees, staff and volunteers); and
- grantee ownership of the work.

Additionally, while not a feature of the programme, a number of grantees reflected that their participation made them feel that PHF was committed to and had confidence in them, which in turn provided a confidence boost to the organisation.

Grantee project leads expressed positive views when asked about the appropriateness of the amount and type of support for the issues that they were working on. All survey respondents agreed that the amount of support was appropriate, and 25 of the 27 respondents agreed that the type of support was appropriate. In the majority of instances this support could be described as 'consultancy', but in a few instances the programme funded other elements, such as external training.

The amount of support, or its intensity, was also related to the 6-month duration of the programme. On the whole, this length appears to have been appropriate. A few grantees reflected that the programme timeframe was short, or felt rushed, but for at least a couple of these their project was compressed for other reasons, and one grantee felt that some of the work took too long and lost momentum.

Responses to the grantee survey suggest that the 'quality and appropriateness' of the consultants was a key factor in determining the success of the support project. Generally, grantees' comments about their own consultant experiences were strongly positive, although a few had mixed experiences.

*"Having an impartial consultant with whom to discuss the issues we were facing was key to the success of the project for us." [grantee, survey]*

*"Our consultant was organised, knowledgeable but importantly made the learning journey interesting for every participant." [grantee, survey]*

The evidence suggests grantees valued their consultants for:

- being organised, objective and knowledgeable;
- providing inclusive, engaging and impartial facilitation;
- being a good 'match' to the grantee organisation with sector awareness;
- having a professional appearance and delivery;
- tailoring the programme content to the grantees' context; and
- finding the balance between flexibility and adhering to the terms of reference.

The finding about the importance, and the generally high quality, of the consultants in delivering FfP is supported by the quantitative data from the survey: 18 of the 27 respondents (67%) "strongly agreed" that the NCVO consultant(s) understood the needs of their organisation, and the remaining 9 (33%) "somewhat agreed".

The relationship with the consultant was such a central part of the programme that where grantees identified areas for improvement, these often referred back to the consultancy experience. In particular, a couple of the arts organisations reflected that they felt stronger sector knowledge would have helped:

*“most of the people we worked with had limited experience of working with the arts sector – with one particular consultant being hindered significantly by this”. [grantee, survey]*

Another of the grantees reflected that *“in some industries the term ‘consultant’ has lost a lot of its credibility and has become a byword for expensive navel-gazing. We did initially experience some scepticism internally and the consultants ... had to work hard to win over one or two individuals.” [grantee, survey]*

Several of the grantees reflected on the extent to which the programme was tailored to their needs and/or aspects were delivered ‘off the shelf’. In some instances this was directly related to the consultant’s ability to translate the work for their context, while others reflected more broadly on the tailoring of the projects to meet their needs. Where grantees felt like aspects of the support were not sufficiently tailored, this hindered their experience.

*“[the consultants] were able to tune into our organisation and the peculiar nature of our work very well and quickly. This made a big difference to the value of the project to us, i.e. it meant that the work they did was really useful and relevant, instead of being ‘off the shelf’ or needing translation to make it work in our context.” [grantee, survey]*

*“we felt that the consultants had really understood us in the planning stages, but when it came to the sessions we felt a bit shoe-horned into an existing structure or methodology and so at points we felt that that they were missing key things being said, or distilling key points and nuances in quite a ‘consultant speak’ way.” [grantee, survey]*

In terms of the programme’s perceived weaknesses, these were mostly linked to a particular grantee experience, rather than being programme wide. The issues raised include two already mentioned:

- individual issues with the consultants, for example a lack of understanding of the arts sector;
- some instances where content felt “formulaic” or “one size fits all”, was already known or was in “consultant speak”;
- consultant turnover leading to a disrupted experience;
- insufficient support for managing the process of change, particularly with reference to the engagement of the board;
- insufficient follow-up or longer-term support;
- lack of clarity about what information was being shared with PHF; and
- ‘clunky processes’: inflexible budgeting arrangements and a long chain of command, through PHF and NCVO (and SCVO in Scotland).

The programme weakness most commonly cited in the post-project survey relates to the turnover of consultants, which was sometimes linked to the personnel changes at NCVO. These changes meant that there was disruption to the support for some of the grantees, particularly those in round 3, which resulted in some grantees having to engage with multiple consultants and, in some instances, a compressed timeframe for the project. One suggested:

*“The project needs to be undertaken with a single consistent lead member of NCVO staff (appropriate*

*to the organisation) who can then brief everyone else (consultants etc.) who is drawn into the project.” [grantee, survey]*

As discussed above, a couple of grantees noted that a potential improvement for the programme would be more support with managing the relationships, particularly between staff and trustees, as they work through the changes instigated by the programme.

Finally, a number of grantees noted that some ongoing support or engagement in the period 6–12 months after the project would have helped to keep them focused and on track. This recommendation came through even more strongly in the 18-month review conversations, being mentioned by a quarter of participants. While some resource was built into the project for this further support, it is not clear whether grantees were always aware that it was available or that it could be requested. In the few cases where this support was accessed, this was felt to have been beneficial.

#### 4.6. Did Fitter for Purpose provide ‘value’ for grantees?

Overall, grantees valued the programme and felt that it had been worthwhile.

Grantee project leads were asked to what extent they agreed with the following statement: *“Given what we expect Fitter for Purpose to achieve for our organisation in the next 18 months, the amount of time and effort we have put into the project so far has been worthwhile.”* 20 of the 27 respondents (74%) *“strongly agreed”* and the remaining 7 respondents (26%) *“somewhat agreed”*. For those who *“somewhat agreed”*, 3 were Education and Learning and 4 were Arts programme organisations; 4 respondents were from round 3. It may be the case that the disruption to the programme experienced by some of the later grantees contributed to this lower perception of ‘value’.

The qualitative evidence from grantees chimes with this finding; however, the open responses also gave grantees more space to reflect on the balance of what the programme had achieved and the resource they had dedicated to it. While still perceived to be ‘good value’, this resourcing had proved challenging for a number of grantees:

*“The project was very useful, and we’re glad we took part in it, and it’s certainly accelerated something for us ... but for an organisation with one part-time member of staff, it placed a high demand on them.” [grantee, survey]*

*“The work we did was incredibly valuable, but it did take a good deal of time.” [grantee, survey]*

While a number of grantees reflected on this resourcing challenge, one of the smaller grantees noted that FfP could have a particularly valuable contribution for organisations of their size.

*“FfP was invaluable for us as a relatively small organisation without a development department or full-time fundraising function ... the kind of focussed, professional consultation that was offered through FfP is not widely available and organisations can subsequently waste time and resources trying to develop [income] sources that are not appropriate to them.” [grantee, survey]*

#### 4.7. Did Fitter for Purpose provide ‘value’ for PHF?

There is no simple answer to the question of whether the programme represented “value” for PHF. The main costs come from the financial investment and staff time, while the benefits mostly accrue from the programme learning and from the extent to which the programme has furthered the PHF mission. Assessing the benefits is therefore a complex task and could be subject to much debate, but to inform the assessment we can provide a sense of the costs.

The total budget for the FfP programme was £373,000, to include £10,000 for programme design; £39,000 for programme management; £24,000 for the evaluation (including the 6- and 18-month follow-up work); and £300,000 for delivery of the 30 projects, with a maximum of £10,000 per project.

The actual programme costs have been £294,000<sup>14</sup>, and the average cost per project has been £9,800 (based on 30 commenced projects; this figure includes project delivery and an appropriate share of the management<sup>15</sup> and evaluation costs, but not PHF permanent staff time). The average cost of the consultancy received by each of the grantees was just under £8,000<sup>16</sup>. In monetary terms, the costs per grantee have been relatively low compared to the majority of PHF grants.

It has not been possible to construct an accurate estimate for the PHF staff time involved in delivering FfP. From discussions with the staff involved, it is estimated that the main contributors were:

- Pilot design and set-up: this included several meetings with the programme heads, the Director and the Director of Finance and Resources, and dedicated time by the PHF project manager.
- Programme management: the running of the pilot happened outside normal business processes, so there was additional work to manage the programme than would otherwise have been the case, in addition to the liaison with NCVO and the grants officers. There was also a steering group for the programme which drew on senior leadership time. The organisational changes at NCVO during the programme meant that quite a bit of time was spent on renegotiating the delivery arrangements to ensure as much consistency for the grantees as possible.
- Grantee identification and liaison: grants officers estimated that they spent up to 0.5 days per grantee on these aspects of the work, making this relatively ‘light touch’ from their perspective; however, this was because many aspects they might traditionally be involved in, such as confirming activity to release payment, were managed centrally.
- Evaluation: the evaluation work included a number of meetings that contributed to the programme management as well as evaluation, a survey of grantees and analysis of the whole portfolio of project documentation. One particular meeting, the ‘learning day’ that involved the grants officers, NCVO consultants and the project manager and focused on process, was felt by those involved to be more resource intensive than necessary.

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<sup>14</sup> This includes an estimate for the outstanding programme costs.

<sup>15</sup> The costs for a project manager who was employed on a contract to manage the programme for a part of its duration are included here.

<sup>16</sup> This calculation is based on the 28 completed projects, and includes the consultancy time for the 6- and 18-month reviews.

In summary, the programme was delivered on top of PHF business as usual, with the main staff time costs occurring in the early stages for the pilot set-up, at the point of renegotiating the programme delivery with NCVO and during the evaluative work.

## 5. What are the lessons for PHF about how to support grantees' organisational development in the future?

There are a number of lessons from FfP that PHF may draw on in developing future organisational development support approaches. In considering the wider applicability of these lessons, it is important to remember the specific context and delivery arrangements for the programme: it was delivered as a pilot, largely outside of PHF's usual business processes, with very limited trustee involvement, and was a relatively small resource investment per grantee. Additionally, the programme aimed to build resilience and involved grantees that were already well known to PHF. These specific contextual factors should be considered when thinking about how to apply and transfer the learning.

### **Programme design**

- The FfP programme was deliberately structured to mitigate the effects of the inherent power dynamics within the triangle of funder, delivery partner and grantee. The arrangements were designed so that grantees would be able to identify and make the case for the support that they wanted, but neither they nor PHF would dictate the issue or form of consultancy. Instead there would be space for the scoping and diagnostic process to take place and for the grantee proposal to be challenged and tested, with the hope that ultimately the most strategic but also most pressing need would be identified and addressed. At the same time, while PHF would pay for the work (directly to NCVO), they would not be directly involved in identifying the issues to be addressed. Instead they would sign off on the basis that the scoping process was an effective approach that would lead to a shared conclusion. This design appears to have worked in the way that was intended, but the details of the implementation also remain important to ensure that a sufficiently strong and trusting relationship between the grantee and delivery partner is established.
- The emphasis on the scoping and diagnostic work, and the in-built flexibility of the programme, was a key strength, with many grantees valuing the reflective space provided by this phase of the process. By comparison with the needs identified by grantees on their applications, just over half of projects focused on different needs after the scoping and project planning stage (either wholly or partly). The trend is that projects moved up a hierarchy of need, looking more at issues such as strategy, impact and governance as opposed to operational issues. The time invested in scoping and diagnostics enabled a better understanding of the grantee's primary need and better buy-in to address that need.
- The participants' engagement in and sense of ownership of the work is vital for any progress to be made, both at the organisational and the individual level. Therefore, all aspects of the programme design should consider how this can be best supported. For example, inviting participation, as in FfP, rather than enforcing it is likely to mean the cohort is more committed to the work. As noted above, engagement in a scoping and diagnostic process can also be supportive of participants' ownership of the work. For the future, it may be appropriate to consider who needs to be engaged and whether this needs to be strengthened for trustees.
- Flexibility in terms of the way the programme was delivered, e.g. training or wider staff development in addition to the consultancy approach, was also valued by particular grantees,

and others commented that they felt alternative approaches could have been helpful. It may be that having an approach that can be even further adapted to the requirements of particular participants would be beneficial.

- The feedback suggests that for a programme on the scale of FfP, the duration (6 months) and amount of consultancy time was about right. A number of grantees did note that some additional follow-up or longer-term support would also have been helpful to keep them on track and ensure the work did not stall. While this was available within FfP, it is not clear whether participants were sufficiently aware of it, or understood how it could be used. Therefore, for future programmes it will be important to consider both the amount and the duration of support, as well as any follow-up support. Where elements of the programme are not part of the central offer, these need to be appropriately communicated so that they are not forgotten.
- Working with a single lead delivery partner (such as NCVO) brings with it both benefits and risks from a PHF perspective. On the one hand, it can make elements of the programme management relatively straightforward, in this case with NCVO undertaking all of the matching between grantees and consultants, and having relatively simple budgeting and payment arrangements. On the other, it can be problematic when issues (such as the personnel changes at NCVO during FfP) threaten the delivery of the work and the grantees' experience. Future programmes may wish to consider alternative models, including perhaps a consortium of providers to minimise this risk, but will need to explicitly consider the implications of these approaches for PHF resourcing and the grantee experience.

### **Participant selection**

The grantees' commitment to the programme was central to its successes, as they were responsible for delivering the work. Flowing from this are a number of implications:

- It is important for participants to understand what is expected of them and to be committed to the work. This is particularly important for the lead contact. Therefore, it is important to make sure that these expectations and the required resourcing commitment are made clear at the outset as part of the invitation to apply.
- The programme ideally needs to be built into the grantees' business plans, supported by the leadership and with buy-in from the staff. Having the grantees involved in the scheduling of the work, and building it into their wider planning, will enable the work to have sufficient priority rather than being viewed as an additional task.
- The capacity to engage with organisational development for some grantees is very limited, especially the smaller ones. It is important to recognise that this work requires resourcing. Not addressing this limited capacity is likely to detract from outcomes, if not during the project then with the ability to follow through afterwards. It may be that these organisations would benefit from a different type of support package.
- Issues around grantee capacity were commonly linked with the timing of the programme; ensuring that the project is scheduled for a quieter time of year, or having some flexibility with the timings, may help grantees to engage with the work.
- In terms of outcomes achieved through FfP, there were no obvious differences across the three PHF programme areas. The success of projects seems to be grantee rather than sector specific.

### **Programme delivery**

- The three-way relationship in a programme of this type (funder/delivery partner/grantee) needs to be actively managed. Some grantees saw NCVO as being close to the Foundation, and so establishing the necessary trust, and understanding of confidentiality, for a productive

relationship was challenging. There needs to be clarity about the lines of communication, and particularly about the extent to which conversations between the grantees and the consultants are confidential.

- Having a degree of consistency in the consultants, or having a single nominated lead who can brief other specialist advisers, will save grantees' time and make the time spent on the project more productive. If multiple organisations are interacting with grantees, it will be important to ensure that they are well briefed in advance, that the messages they deliver are consistent and complementary, and that the scheduling of these different inputs is appropriate.
- The coordination role of matching consultants to grantees was critical to the success of the programme, as the quality and fit of the consultancy role is one of the key factors in the grantee's experience. In this instance the matching process was managed within NCVO and was broadly successful due to the coordinator's knowledge of the consultants and the flexible approach to reallocating consultants in the cases of a mismatch. If using an alternative contractual model, particularly with multiple organisations, or one in which PHF is at arm's length from the commissioning, PHF may wish to consider how this matching can be supported.
- The quality of the consultants, in a programme of this type, is vital to support the grantee experience. It is important, therefore, to ensure that an appropriate number and range of quality consultants are available.
- Ensuring that the processes within PHF fit with 'business as usual', rather than being an added extra, and ensuring that the grants team have clarity about their role in the programme will support learning more than was the case in the FfP programme.
- Ensuring that the budgeting, communication and process elements of the programme are not overly bureaucratic will be of benefit to all parties.

### **Learning and evaluation**

- Taking a reflective approach and building in time for learning was a useful element of the programme, even though at times this became slightly bureaucratic. It meant that there were opportunities to flex the programme implementation to better suit the needs of all parties.
- The participants provided very thoughtful responses and considerable detail in the post-project online survey. This was one of the few moments that evaluation data was captured directly from participants in their own words, rather than being filtered through the consultants. Having this source was particularly helpful in understanding different perspectives. Ensuring that there is an opportunity for direct feedback seems like a very important element to include for similar work in the future.
- The 6- and 18-month review conversations provided an effective way to capture information about what had happened since the end of the project. While originally designed to be part of the programme of support, in many cases these conversations effectively functioned as data collection points for the evaluation. In future programmes, it would be worth considering the function of these review points more explicitly and, more overtly separating the support from the evaluative aspects of the programme.
- It was not originally clear to what extent the 18-month follow-up reviews would be productive, whether participants would still be able to talk meaningfully about the work and whether they would add new insights. What transpired was that, in the majority of cases, programme participants *were* able to reflect on the longer-term impact of the programme, in some cases with a clearer sense of what the changes were than at the 6-month review. These reviews were particularly insightful for those organisations that had addressed strategic rather than tactical issues, where the changes had the potential to have longer-term impact.

## 6. Conclusion

The Fitter for Purpose programme was conceived at a time when the economic environment for charities and grantee organisations was felt to be particularly challenging. Now, at the end of the programme, the funding situation for many of these organisations remains difficult. A mark of success is that all of the programme participants have weathered this period and, in many cases, have used the programme as a springboard to develop a clearer articulation of their strategy and new approaches to organisational development activities.

The sense of renewed confidence, the time and space to engage with strategic thinking and the moral support provided by the programme appear to have given some of these organisations a boost. It seems that this softer support, as well as the more technical and practical inputs, contributed to the overall impact of the programme.

For PHF the programme has provided an opportunity to try out a new approach to supporting grantee organisations' development, and to test assumptions, reflect and learn. This programme and the resulting learning should provide a stepping stone from which the Foundation can develop new approaches in the future.

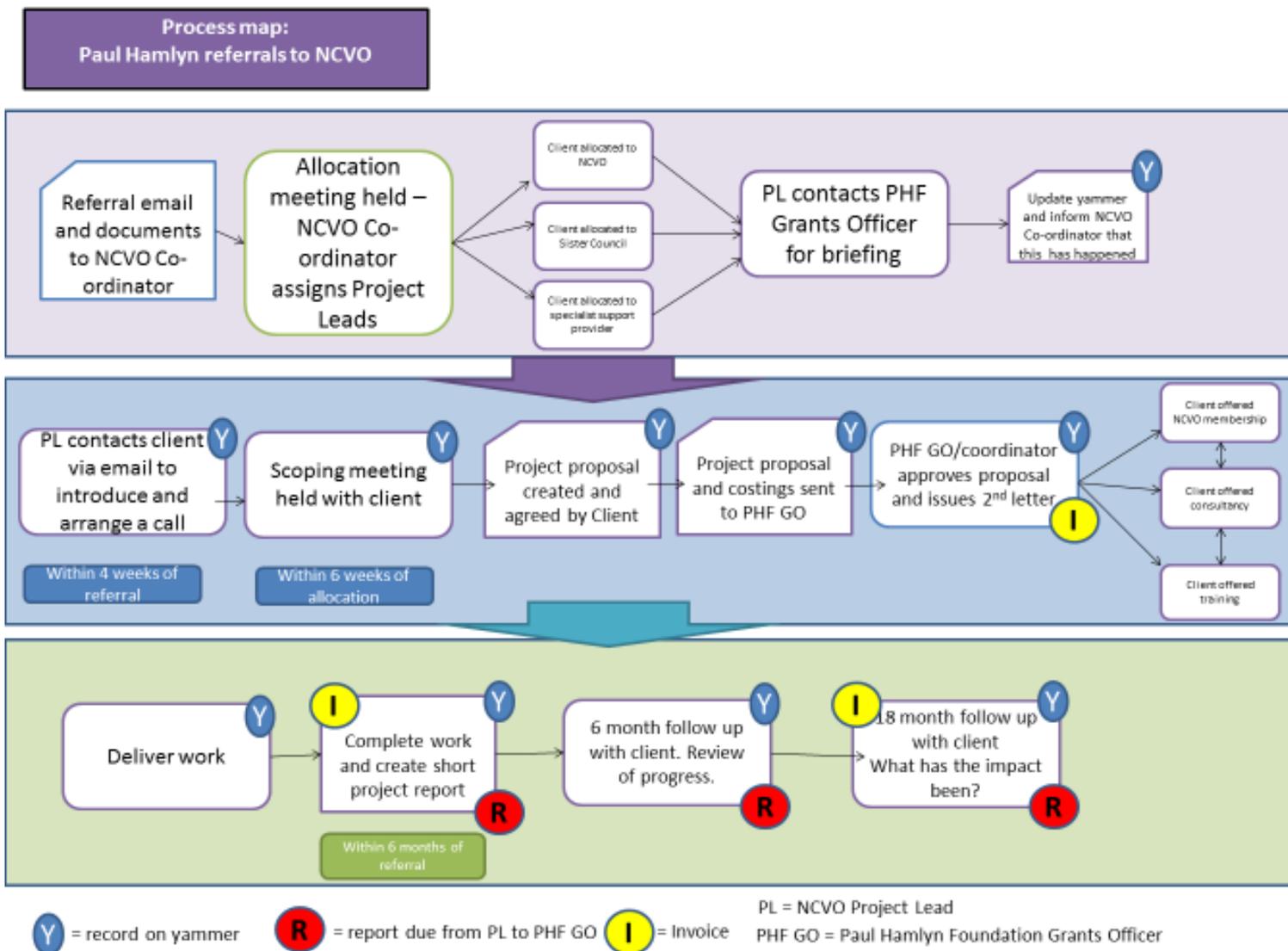
## Appendix 1: Data sources for the evaluation

Number of grantee organisations that completed the Fitter for Purpose programme and the corresponding data sources available for the evaluation analysis.

FfP	PHF programme	Grantees (n)	Data sources					
			Application form	Project proposal	Project report	Post-project online survey	6-month review report	18-month review report
Round 1	Arts	2	8	8	8	8	8	7
	Education & Learning	4						
	Social Justice	2						
Round 2	Arts	3	8	8	8	8	8	8
	Education & Learning	3						
	Social Justice	2						
Round 3	Arts	6	12	11	12	11	11	12
	Education & Learning	3						
	Social Justice	3						
<b>FfP total</b>	<b>Arts</b>	<b>11</b>	<b>28</b>	<b>27</b>	<b>28</b>	<b>27</b>	<b>27</b>	<b>27</b>
	<b>Education &amp; Learning</b>	<b>10</b>						
	<b>Social Justice</b>	<b>7</b>						

The two grantees who started but did not complete the programme were in addition to the table above, one in round 1 and one in round 3; both were Social Justice programme grantees.

## Appendix 2: Process map for the Fitter for Purpose programme



### Appendix 3: Post-project online survey

The post-project online survey was created in Survey Monkey. This was sent to and completed by the project lead in each participating organisation. Respondents were asked to rate their level of agreement with a number of statements based on a 5 point Likert scale: Strongly agree; Agree somewhat; Neither agree nor disagree; Disagree somewhat; Strongly disagree. Respondents were also invited to provide a number of free text responses. The questions are listed below.

No.	Question wording	Answer format
Q1	To what extent did the Fitter for Purpose project meet your organisation's needs?	
	The issue(s) we worked on is very important to the future of our organisation	Likert scale
	The Fitter for Purpose project was at the right time for our organisation	Likert scale
	The NCVO consultant(s) understood the needs of our organisation	Likert scale
	The NVCO consultant(s) helped us to work out what we needed to do next	Likert scale
Q2	The Fitter for Purpose project provided:	
	Clear communication before we applied about what was on offer	Likert scale
	Clear communication before we applied about what was on offer	Likert scale
	An appropriate amount of support for the issues we were working on	Likert scale
	The appropriate type of support for the issues we were working on	Likert scale
	Consultant(s) with appropriate skills for the issues we were working on	Likert scale
	Comments	Free text
Q3	As a result of the work with NVCO on the Fitter for Purpose project:	
	We have a better understanding of the problems we were working on	Likert scale
	We have a clear plan of action	Likert scale
	We have the confidence to make necessary changes	Likert scale
	People in our organisation are in agreement about what to do next	Likert scale
	Comments	Free text
Q4	In 18 months' time, as a result of the Fitter for Purpose work, I expect our organisation to be:	
	More efficient	Likert scale
	More effective	Likert scale
	Have improved outcomes for beneficiaries	Likert scale
	Be more influential in our sector	Likert scale
	Be more financially sustainable	Likert scale
	Comments	Free text
Q5	Given what we expect Fitter for Purpose to achieve for our organisation in the next 18 months, the amount of time and effort we have put into the project so far has been worthwhile	Likert scale
Q6	Given the amount of support we received through Fitter for Purpose, the amount of time and effort we put into applying was worthwhile	Likert scale
Q7	What was the most helpful aspect of Fitter for Purpose, in your experience?	Free text
Q8	What was the least helpful aspect of Fitter for Purpose, in your experience?	Free text
Q9	Please add any further comments you may have about Fitter for Purpose, including suggestions for making it more effective	Free text