



Scope of Services

Cranfield Trust volunteers provide management advice and guidance across a range of management topics, but the Trust does not advise on topics which are in regulated areas to manage and reduce risk.

Areas in which we limit the scope of our advice include HR/Employment, Finance and Financial Management, GDPR, Data Protection and Information Governance, and Health and Safety. For more information on the scope of Trust services, please see [link].

Cranfield Trust volunteers act as advisers, consultants, mentors and facilitators. Across all our services, decision making rests with the client organisation.

We do not take liability for advice through any of our services, a disclaimer is available for staff and volunteers to use on all documentation to make this clear.

Scope of Services

Cranfield Trust volunteers are asked to ensure that their advice does not cover the out of scope areas listed, to ensure that advice given is not within highly regulated areas.

Please contact [Amanda Tincknell](#), Chief Executive, if you would have any questions, or would like to discuss this further.

HR/Employment advice

We scope and manage HR projects carefully, as staff issues frequently come up in our consultancy and mentoring work.

Our scope of services **INCLUDES:**

Strategic HR matters, 'how to' good practice, managing change, leadership development, process improvement. Activities which relate to staff collectively, and to organisations.

Examples of areas where we can support projects, or advice:

- 'How to' advice – this should be good practice advice, not advice on individual situations.
- Developing processes and systems – to support HR function
- Strategic HR – areas for investment, skills development, building talent, how HR supports organisations, DEI
- Mergers – but not the impact of a merger on individuals
- Employee engagement and communications
- Culture change/change management.

Our scope of services **EXCLUDES:**

- Advice on individual situations
- Operational HR matters
- Reviewing policies (which are underpinned by legislation and therefore need to be compliant and up to date).

The Trust does not provide detailed organisation structure guidance (eg with individual roles detailed).

We avoid advising on areas where there is potential for discrimination, for example

- Individual employee cases relating to performance, conduct, or capability issues which might lead to dismissal. This could lead to claims at an employment tribunal/court for discrimination (unlimited award), unfair dismissal, breach of contract, etc
- Redundancy situations where there may be potential for unfair dismissal claims
- Recruitment processes (which might lead to unfair/unlawful practice and potential claims of discrimination)
- TUPE transfer/mergers which may lead to legal claims
- Situations where there have been breaches in data protection legislation

Finance/financial management advice

Our work in this area tends to be around financial processes and developing financial information.

Our scope of services **INCLUDES:**

- Financial management
- Preparation of management accounts
- Financial plans and reports, cost or pricing models
- Financial strategy
- Financial modelling (although caution will be needed if this is related to a change in organisation structure and consequent changes to job roles)
- Advice on financial management processes

Our scope of services **EXCLUDES:**

- Advice on or review of investments
- Choice of investment/financial advisors or managers
- Bank accounts or other recommendations on services or products
- Any areas regulated by the FCA: covered by the terms financial 'advice' which makes recommendations of specific financial products, or 'guidance' which gives information on different options, services or products.

GDPR and Information governance

We do not offer any advice on GDPR and information governance, this is a specialist area and not within the remit of our general management advice/consultancy services.

Health and Safety advice

We do not offer any advice in this specialist area.