



Charity Management Matters

Research Appendices

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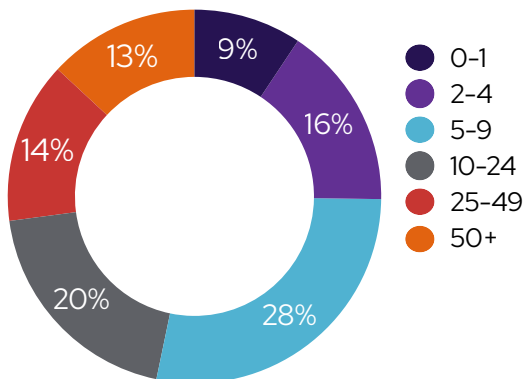
These appendices accompanies the full report: *Management and Leadership Training in the Voluntary Sector*, which is available on Cranfield Trust's website.

Appendix A: Additional Survey Information & Findings

The survey analysis comprises 107 survey responses after exclusions; responses were excluded if participants dropped out before questions about skills needs. "Don't know" responses were excluded from percentage summaries, unless their lack of certainty or preference was central to the question asked. Where mean scores are given, they represent an average on a four-point Likert scale, where 0 is the minimum possible score and 3 is the maximum.

Demographics

How many full-time-equivalent staff does your organisation employ?



It was anticipated that charities responding to the survey would be small, fitting the profile of the charities that Cranfield Trust supports. Charities were reasonably evenly distributed according to the survey categories, with the largest proportion (28%) employing between five and nine full-time equivalent members of staff.

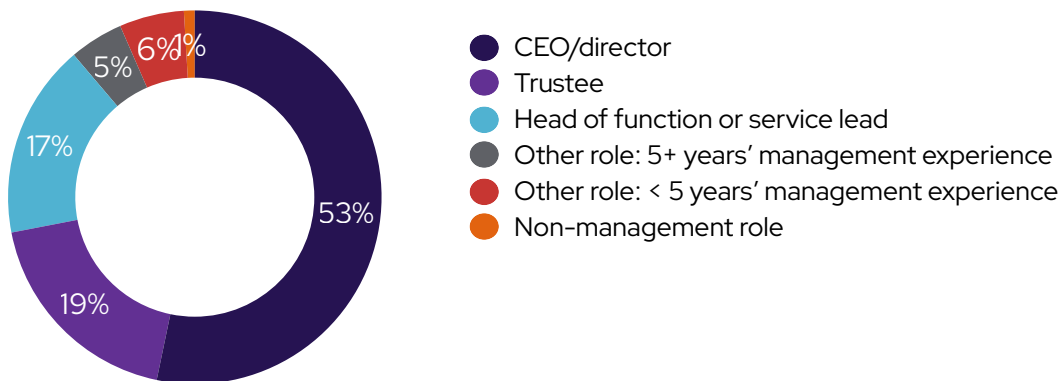
Who or what is the main focus of your charity?

Focus Area	%
Hobbies/recreation/arts/social clubs	1%
Local community or neighbourhood groups	9%
Health/disability and social welfare	33%
Sport/exercise	0%
Older people	3%
Youth/children's activities (outside of school)	8%
Children's education/schools	1%
Religion	1%
The environment or animals	3%
Politics	0%

Focus Area	%
Education for adults	3%
Justice and human rights	5%
Citizens' groups	1%
Safety/first aid	0%
Other	32%

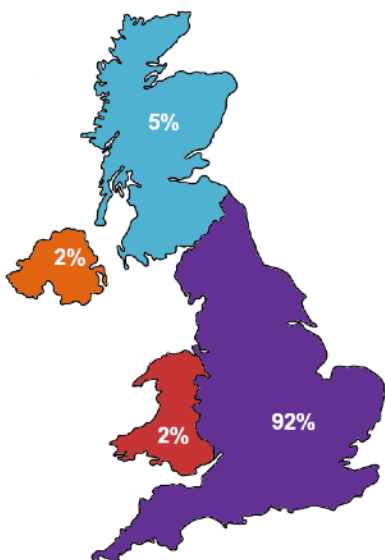
The highest proportion of individuals responding to the survey worked for charities focusing on health/disability and social welfare (33%). Almost the same proportion (32%) defined their focus as "Other", implying that the survey categories did not fit many individuals' perceptions of the work their charities do. The next most common areas were local community or neighbourhood groups (9%) and youth/children's activities outside of school (8%).

What is your role within your organisation?



Most of the people responding to the survey worked as charity chief executives or directors (53%). The next biggest groups were trustees (19%) and head of function or service leads (17%).

Where is your organisation headquartered?



Most charities responding to the survey were headquartered in England (92%), with 5% headquartered in Scotland and 2% headquartered in Northern Ireland and Wales, respectively. These figures add up to 101% due to rounding.

Management Skills Needs

What is your current skill level in each of the following areas?¹

Area	Not at all skilled	Not very skilled	Moderately skilled	Highly skilled	Mean (out of 3)
General management	0%	3%	31%	66%	2.6
Financial management	2%	14%	53%	30%	2.1
People management	1%	5%	45%	50%	2.4
Volunteer management	8%	21%	45%	26%	1.9
Equality, diversity & inclusion	4%	20%	60%	17%	1.9
Compliance	4%	15%	50%	30%	2.1
Project management	2%	9%	44%	46%	2.3
Risk management	4%	16%	51%	29%	2.0
Change management	5%	15%	47%	33%	2.1
Stakeholder engagement	5%	15%	41%	38%	2.1
Monitoring, evaluation & impact reporting	4%	14%	49%	34%	2.1

Managers and leaders were most confident in their general management, people management and project management skills when looking at mean scores (as opposed to a combination of those believing they were moderately or highly skilled, which was used in the main calculations). They were least confident in their volunteer management and equality, diversity and inclusion skills.

When survey participants were broken down into CEOs/directors, trustees and other roles, members of each group were – again – most confident in their general management skills. CEOs/directors were least confident in (a) their equality, diversity and inclusion skills and (b) their financial strategy skills (both 2.0 out of 3). Trustees were least confident in their volunteer management skills (1.4 out of 3). People with other roles² were least confident in their financial strategy skills (1.6 out of 3).

¹ 'Highly skilled' here means you have the abilities needed to perform related aspects of your job well without further support or training, and 'not at all skilled' means you do not yet have any abilities in this area.

² Other roles were combined due to relatively small numbers of absolute responses.

Do you need to be skilled in any of these areas to perform your current role effectively? [% answering yes.³]



People management (90%), general management (89%) and risk management (87%) were the areas in which participants most needed to be skilled. Other areas of management ranged between 80% and 85%, with the exception of volunteer management, in which only 53% of people needed to be skilled.

CEOs/directors were most likely to say they required risk management (91%), general management (91%), stakeholder engagement (89%) and people management (91%) skills. All trustees surveyed believed they need compliance skills. Survey participants with other roles were most likely to say they required people management (97%), project management (93%) and general management (87%) skills.

³ Those answering 'I don't know' were excluded from the calculations.

Would you like to develop skills in any of these areas over the next 24 months? [% answering yes.⁴]



The most popular areas in which people would like to develop skills in the next 24 months are monitoring, evaluation and impact reporting (67%), equality, diversity and inclusion (65%) and financial management (57%). The least popular areas are volunteer management (33%) and general management (39%).

CEOs/directors would most like to develop skills in equality, diversity and inclusion (64%). For trustees, the relevant area is stakeholder engagement (77%). Those in other roles would most like to develop change management skills (77%).

Leadership Skills Needs

What is your current skill level in each of the following areas?⁵

Area	Not at all skilled	Not very skilled	Moderately skilled	Highly skilled	Mean (out of 3)
Governance	1%	12%	43%	44%	2.3
Leadership	1%	7%	39%	53%	2.4
Organisational strategy	3%	9%	50%	38%	2.2
Financial strategy	7%	23%	50%	21%	1.8

⁴ Those answering 'I don't know' were excluded from the calculations.

⁵ 'Highly skilled' here means you have the abilities needed to perform related aspects of your job well without further support or training, and 'not at all skilled' means you do not yet have any abilities in this area.

General leadership was the area in which survey participants feel the most skilled (mean score of 2.4 out of 3), followed by governance (2.3) and organisational strategy (2.2). They felt least skilled in financial strategy (1.8).

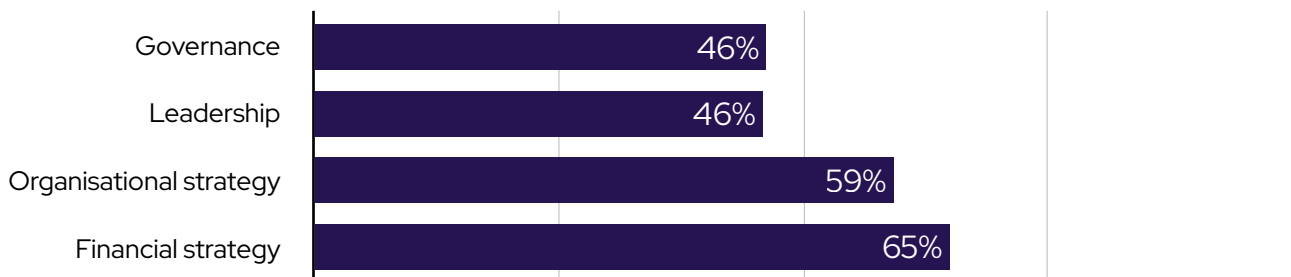
Required Skills

Do you need to be skilled in any of these areas to perform your current role effectively? [% answering yes.⁶]



A similar level of different types of leadership skills were required by managers and leaders to perform their roles effectively, with leadership and organisational strategy skills both needed by 88% of survey participants, and governance and financial strategy skills needed by 84%.

Would you like to develop skills in any of these areas over the next 24 months? [% answering yes.⁷]



Survey respondents would most like to develop skills in financial strategy (65%) over the next 24 months, followed by organisational strategy (59%). Slightly under half (46%) would like to develop governance and general leadership skills respectively.

The most popular area for the next 24 months for CEOs/directors is financial strategy (63%); for trustees, it is governance (77%); and for other roles, it is equally leadership and organisational strategy (70%).

Priority Skills Area

Managers and leaders were asked to choose the area in which they would most benefit from participating in management and leadership training. Organisational strategy was the area needed by the largest proportion (20%), followed by monitoring, evaluation and impact reporting (16%), financial management (11%) and financial strategy (11%). The areas receiving the least attention were

⁶ Those answering 'I don't know' were excluded from the calculations.

⁷ Those answering 'I don't know' were excluded from the calculations.

risk management (1%) and change management, people management and volunteer management (2% each).

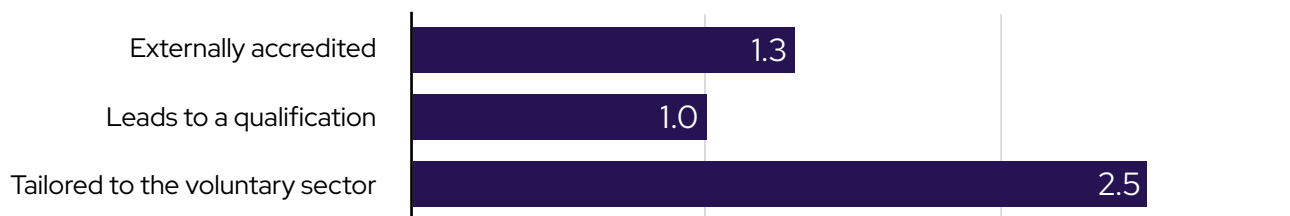
CEOs/directors and trustees were most likely to select organisational strategy; other roles were most likely to select monitoring, evaluation and impact reporting.

Importance of Accreditation, Qualifications and Tailoring

(a) How important to you is it that external learning is accredited by an independent awarding organisation or other recognised institution, such as the Chartered Management Institute or ILM?

(b) How important to you is it that this learning leads directly or indirectly to a qualification, or that it offers continuing professional development (CPD) hours?

(c) How important to you is it that externally provided management and leadership training is tailored towards the needs of the voluntary sector?



Area	Not at all important	Not very important	Important	Very important	Mean (out of 3)
Externally accredited	20%	39%	31%	10%	1.3
Leads to a qualification	34%	38%	21%	6%	1.0
Tailored to the vol. sector	1%	7%	32%	60%	2.5

This section is also discussed in the main body of the report; the data tables above give further details.

Additional Tests

It was assumed there would be differences in skills levels and needs according to organisation size, with smaller organisations experiencing greater skills gaps and having greater needs. Organisations were recoded into two groups: those with fewer than 10 staff (53% of survey respondents) and those with ten staff and above (47% of respondents).

Contrary to expectations, there were few statistically significant differences according to organisation size. General management skills represented an exception to this; those from the smaller charities were less likely to think they were skilled in this area,⁸ and more likely to think

⁸ p<0.05.

general management skills were needed to perform their roles effectively.⁹ Those from the smaller charities were also more likely to think they needed leadership skills¹⁰ and monitoring, evaluation and learning skills¹¹ in their current roles. The fact that so few areas were statistically significant, however, leaves open the possibility that these findings are due to chance – in other words, that they are statistical white noise.

⁹ $p < 0.05$.

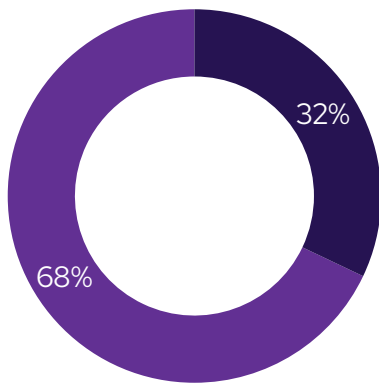
¹⁰ $p < 0.05$.

¹¹ $p < 0.05$.

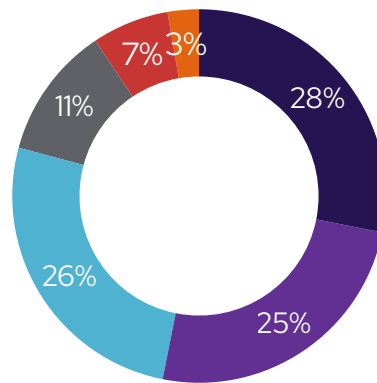
Appendix B: Market Map Overview

This appendix gives a visual overview of the current voluntary-sector management and leadership training market in the United Kingdom, based on a review of 482 courses from 147 unique providers. Full details of the courses are available in the accompanying market map.

Subjects



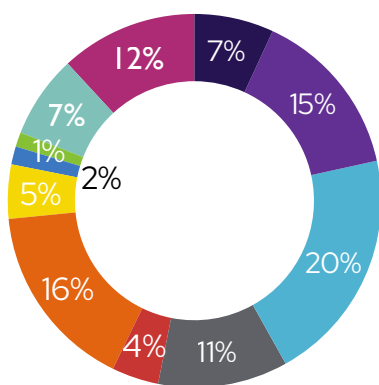
- Leadership
- Management



- Leadership & strategic direction
- Financial management, compliance & sustainability
- People
- Performance and impact
- Other management
- Cross-cutting

The first doughnut chart shows the proportion of mapped courses that focus on (a) leadership and (b) management. Cross-cutting courses have been excluded from this chart. The second shows courses by broad subject area.

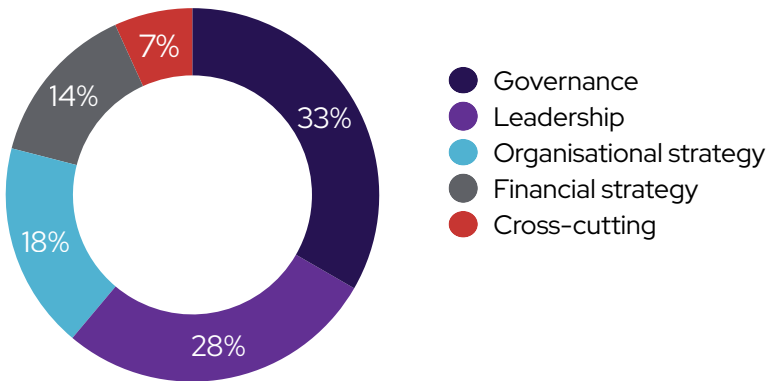
Management Focus



- General management
- Financial management
- People management
- Volunteer management
- Equality, diversity and inclusion
- Compliance
- Project management
- Risk management
- Change management
- Stakeholder engagement
- Monitoring, evaluation and impact reporting

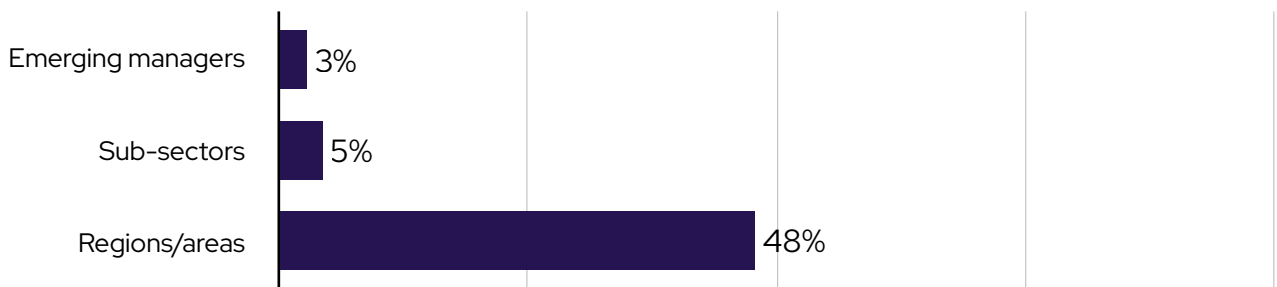
This chart shows the topic focus of available management courses.

Leadership Focus



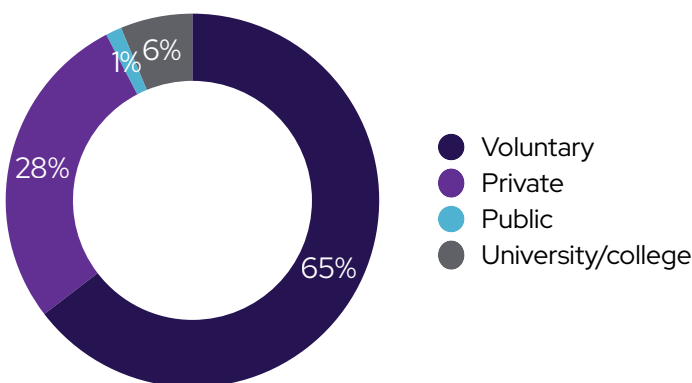
This chart shows the topic focus of leadership courses.

Specific Focuses



The chart on the previous page shows the proportion of management and leadership courses that (a) have a focus on upskilling emerging managers, (b) have a focus on a particular sub-sector, such as conservation or domestic violence and (c) are specific to a particular area or region/nation, such as Cornwall or Scotland.

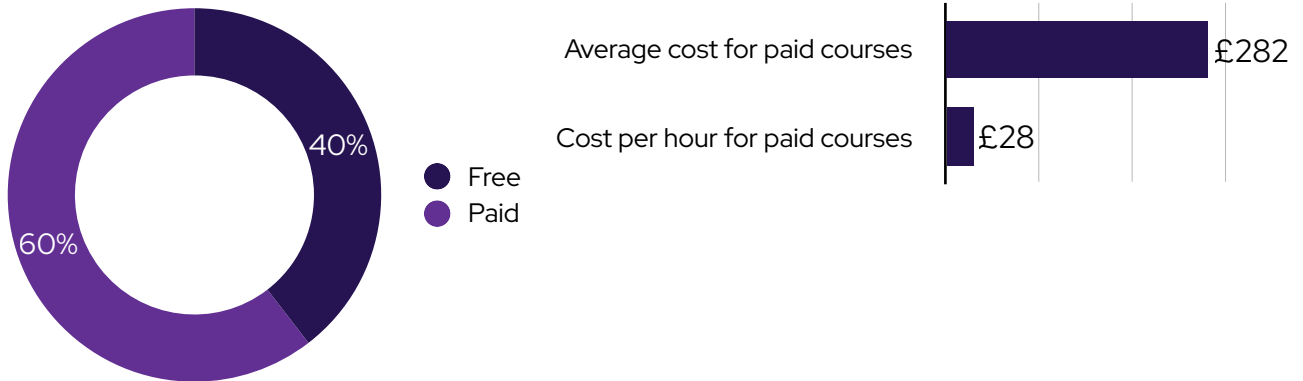
Providers



This chart shows the proportion of providers that are from the voluntary sector, private sector, public sector and those that are universities or colleges (while universities and colleges can be defined within the first three sectors, they make a useful category in their own right when it comes to training).

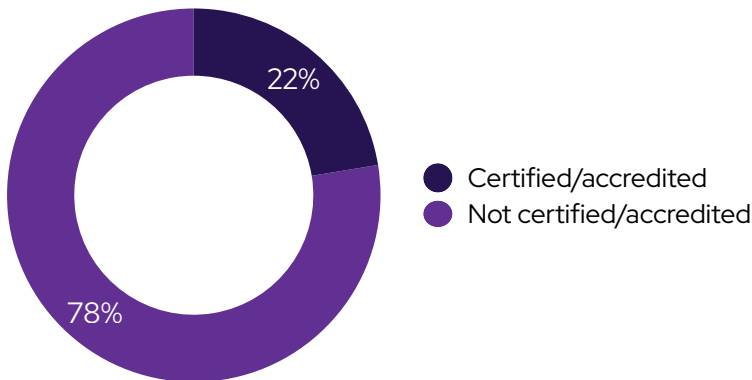
Cost

The doughnut chart shows the proportion of mapped courses that are free and those that charge a fee. The second shows the overall average cost for paid courses, and the cost per hour to which this equates. Please note that courses have been excluded from these calculations when fees were not explicitly stated (this was the case for 42 courses).

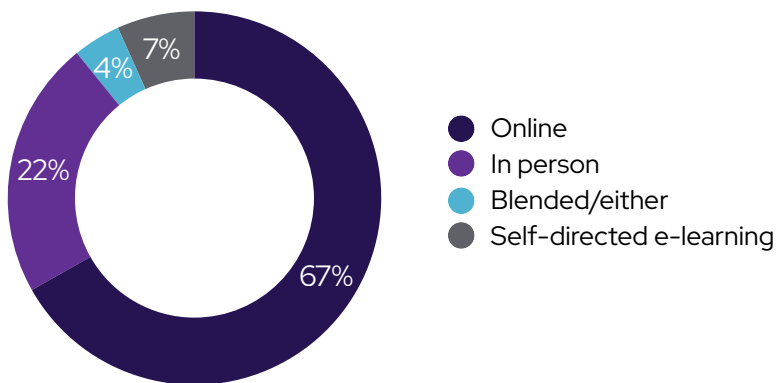


Accreditation

This chart shows the proportion of mapped courses that are certified or accredited – for example, they enable participants to accrue CPD hours, or they are accredited by an external organisation such as the Chartered Management Institute or the Institute of Leadership & Management.



Delivery Mode



This chart shows the proportion of mapped courses according to delivery mode. Where delivery mode was not stated (18 courses), data was excluded.

Appendix C. Decisions on Priority Areas

Area	Moderately /Highly Skilled in this Area	Skills Required for Current Role	Would Like to Develop Skill in Future	Course Availability	Priority for Cranfield Trust
	% Who Agree				
Financial Strategy	71%	84%	65%	Low	High
Equality, Diversity & Inclusion	76%	82%	65%	Low	High
Change Management	80%	85%	55%	Low	High
Risk Management	80%	87%	51%	Low	High
Project Management	90%	80%	47%	Low	High
Monitoring, Evaluation & Impact Reporting	83%	84%	67%	Moderate	High
Organisational Strategy	88%	88%	59%	Moderate	High
Stakeholder Engagement	80%	85%	54%	Moderate	Moderate
Financial Management	84%	81%	57%	High	Moderate
Compliance	81%	83%	51%	High	Moderate
General Management	97%	89%	39%	Moderate	Low
Volunteer Management	72%	53%	33%	Moderate	Low
People Management	94%	90%	46%	High	[Low]*
Governance	87%	84%	46%	High	Low
Leadership	92%	88%	46%	High	Low

Table Key

Bottom third
Middle third
Top third

*This was recoded to high on the basis of interviews and workshop feedback; people did not tend to perceive people management as a personal skills gap, but they perceived a need for relevant

training in their colleagues.

Decisions on Priority Areas

The table on the preceding page displays the proportion of survey respondents who believe they are already moderately or highly skilled in this area; the proportion who believe being skilled in this area is necessary for their current roles; and the proportion who say they would like to develop this area in future (the next 24 months). "Course availability" is taken from the market map. Low availability means the skill area is in the bottom third of courses by number; moderate availability means it is in the middle third; and high availability means it is in the top third.

		Supply		
		Low	Moderate	High
Demand	Low	Low priority	Low priority	Low priority
	Moderate	High priority	Moderate priority	Moderate priority
	High	High priority	High priority	Moderate priority

Priority areas have been assessed using course availability as a proxy for supply and future skills development priorities as a proxy for demand. Skill areas have been marked as low priority when demand is low. They have been marked as moderate priority when demand is moderate and supply is moderate or high, and when both demand and supply are high. They have been marked as high priority when demand is moderate and supply is low; and when demand is high and supply is moderate or low.