



# Charity Management Matters

Research into Management and Leadership Training  
in the Voluntary Sector

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## Foreword

The Masonic Charitable Foundation (MCF, the Freemasons' charity) is proud to support the publication of this important report. MCF and Cranfield Trust have been working in partnership since 2021, to support smaller charities in their vital work across the country.

The research findings and the insights gathered through surveys and interviews with individuals in the voluntary sector will enable Cranfield Trust and others in the sector to further enhance support for smaller charities in the coming years.

Last year, Freemasonry awarded around £51m to charitable causes – almost £1m per week – and the MCF's partnership with Cranfield Trust is a fantastic example of Freemasonry's dedication to supporting and engaging with communities in a way that creates meaningful change, emphasising our belief in the transformative power of knowledge and deeper understanding.

By supporting this research, and funding the excellent pro-bono management support of Cranfield Trust, we are taking a significant step towards a more resilient charitable sector, where every organisation, regardless of its size, can thrive and contribute to a brighter future for everyone



**Les Hutchinson**

Chief Executive, Masonic Charitable Foundation



## Introduction

Cranfield Trust is the leading provider of pro-bono management support to the voluntary sector. Over almost 35 years, we have supported more than 5,000 charities with free consultancy and mentoring assignments, and we also offer telephone support, peer support groups, webinars and information resources via our website.

Our clients are the small- to medium-sized charities that we all depend on, providing welfare services across our communities. They are often led and managed by highly committed and motivated experts in their service areas, but have few resources to invest in management or organisation development. Through our extensive contacts and in-depth work with hundreds of charities, we have gained a deep insight into leadership and management skills, and skills gaps, across the sector.

In the testing climate of the 2020s, resilient organisations need highly skilled leaders and managers. They need strategic thinking, strong financial management, clear and supportive people management and good marketing and communications.

Thanks to our volunteers and supporters, we work with our charity clients to support their skills development, but even with our high activity level, we are still only reaching a part of the sector.

With this research, we set out to explore leadership and management training for smaller voluntary organisations, what learning opportunities charity managers feel they need, and how the training market matches – or not – their needs.

Our aim was to explore the potential development of a management learning programme, to see whether we could help leaders and managers to develop skills, at scale, by helping more people to engage with training, both our own, and that of partners in the sector.

The research gives us real insight and strong pointers as to how we can develop our own training offer, and how we can use our knowledge and experience of working closely with smaller organisations to help them find relevant, effective training. Our challenge now is to work through our own services, and with others, to find ways of ensuring that leaders and managers of frontline voluntary organisations can effectively develop the skills they need to sustain their services at a time of challenge.

Next steps for Cranfield Trust will be to:

- **Improve navigation** of our own learning materials, information resources and webinar recordings (all at [www.cranfieldtrust.org](http://www.cranfieldtrust.org)) around a structure which helps charity leaders and managers to find the guidance they need, and to understand what to expect and what they will learn through engaging with our resources.



- Continue to develop new materials and to host webinars in our 'Essentials to Excellence' management learning series, to **fill the gaps** identified by the research, and to promote engagement with management learning and development.
- Seek to **collaborate with other training providers**, identifying training courses outside our own areas of expertise, improving charities' navigation and understanding of learning opportunities, and working together, raising awareness of the training available free or at low cost.

As well as developing our own support, we call on

- **Funders and donors** to support skills development in smaller charities. With only just over half of charities surveyed having a training budget, and unrestricted funding difficult to raise, support for training and other development activities is vital to enable charity leaders and managers to build confidence in key skills, at a time when they need them most.
- **Training providers** to fill key gaps in training provision, and to be clear about the courses and programmes they offer. Charities told us that it is difficult to understand course content and therefore to invest time and money in training, and that courses are not always practical. Clear descriptions, easier navigation and real world examples in training opportunities will make it easier for leaders and managers to identify the right course at the right time.
- **Charity leaders** to make time for skills development. With so many pressures and very limited time and money, it's understandable that many leaders and managers are not investing in skills development right now. Developing a culture of learning and investing in your team's skills is vital to keep up with the demands of a fast-changing environment.

We are extremely grateful to the Masonic Charitable Foundation for their support with this study, to Matilda Gosling for carrying out the research and reporting, and to all those who participated and helped us with their views and ideas.

We look forward to working with sector colleagues to support the skills development of the leaders and managers who are vital to the frontline charities on which we all rely.



**Amanda Tincknell** CBE  
Chief Executive, Cranfield Trust



## Executive Summary

This paper summarises the findings of a research project into management and leadership training in the voluntary sector. The research employed a combination of market mapping, a survey, interviews and a workshop to identify the sector's needs and to make recommendations on how Cranfield Trust and others may best target their support.

### Recommendations

The recommendations 1-6 listed below are suggested as short-term actions, 7-9 are suggested medium-term actions.

1. Develop training courses in areas in which there are key gaps.
2. Develop an online map of existing providers.
3. Set up weekly or monthly email bulletins of upcoming training courses to disseminate to charities, mirroring what is available internally for larger charities.
4. Consider the importance of accreditation.
5. Consider how to articulate the case for training among trustees, leaders, managers and funders.
6. Help managers and leaders to embed training.
7. Support leaders and managers to develop the skills to train and mentor their colleagues.
8. Offer an online management and leadership training needs assessment.
9. Consider how best to keep leadership and management skills updated in those who may not have undertaken any learning for a long period.

The final section of the report offers recommendations for charities wanting to access training.

For more detailed information and the market map, please see the appendices:

<https://www.cranfieldtrust.org/pages/charity-management-matters>



## Background

The current climate has been particularly challenging for many small- and medium-sized charities, with a punishing funding environment and high demand for services superseding the difficulties of Covid.

***“It’s been really difficult for charities to pull out of Covid – even the resilient ones.”***

*Interviewee*

Having skilled, knowledgeable individuals in leadership and management positions is critical, and their ability to weather these challenges can be supported by affordable, high-quality training. This is often lacking. This research on management and leadership training was designed to provide Cranfield Trust and others in the sector with the information needed to fill this gap.

The following report summarises a map of available training programmes, a sector survey with over 100 voluntary-sector leaders and managers, mainly from small- to medium-sized organisations, and follow-up interviews with 15 individuals. It sets out some original assumptions that were tested through the research, then covers a series of recommendations with supporting evidence. It concludes with ideas for charities wanting to source immediate access to management and leadership training. The accompanying appendices summarise survey findings and the market map and explain how priority course areas were calculated.

The market map (available to view at [www.cranfieldtrust.org/pages/charity-management-matters](http://www.cranfieldtrust.org/pages/charity-management-matters)) is based on a review of 482 voluntary-sector management and leadership courses from 147 unique providers. It does not comprise all relevant courses, and is limited by the search terms used. The sector survey link was disseminated by Cranfield Trust and in charity-sector publications; 107 useable survey responses were completed online in June 2023.

Interviews were conducted between June and July 2023 with sector leaders and managers. While their individual responses are anonymous, a list of the people who generously contributed their time to the interviews can be found at the end of this report. Interviews were analysed thematically. Detailed notes were taken during the interviews, rather than verbatim transcripts; quotations reflect the general spirit of what was said. In a small number of cases, small adjustments to phrasing were made – for example, replacing a specific form of training with a similar but more general example – to ensure that no quotations were identifying.

Findings and recommendations from this research were tested a validation workshop in September 2023.



## Testing Assumptions

Cranfield Trust made a number of assumptions at the start of the research.

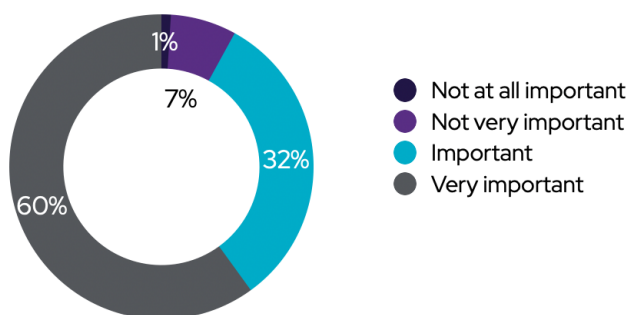
**Assumption: Although there is a lot of management training available, in person and online, charity managers prefer training that is geared to the voluntary sector.**

This assumption has broadly been met. Most charity managers do prefer training that is geared to the sector. There are some exceptions, and alternative models were suggested during the research – such as charity-specific top-up courses to complement more general management training.

### Key Findings

- **Almost everyone – 92% of survey respondents – thought it was important that externally provided management and leadership training is tailored towards the needs of the voluntary sector.** Some interviewees, however, believed there is value in mixing with people from other sectors, and that a lot of what is needed by leaders and managers is generic. Alternatives to sector-specific training include charity-specific course add-ons, or break-out groups separating businesses and charities.

### Importance of tailoring management and leadership training to the needs of the sector [survey]



**Assumption: Low-cost management training is not widely available for small- to medium-sized charities, especially for emerging managers.**

This assumption has also broadly been met, with caveats. Low-cost training is available, but it is often perceived to be of insufficient quality to be useful, and training providers need to address this. High-quality, high-cost training is unaffordable. There is a gap in affordable training for emerging managers.





## Key Findings

- **Cost presents a significant barrier to people wanting to access management and leadership training in the sector.** 93% of survey respondents said it was a barrier, and most interviewees believed that this type of training is unaffordable.
- **Similar cost barriers exist for emerging managers.** Training for emerging managers tends to be unaffordable, according to most interviewees who commented on this issue.

### Cost as a barrier to accessing external management or leadership training [survey]



- **Mid-sized charities may face particular obstacles.** Available training is often targeted at micro-charities, which may also benefit from subsidies, and larger organisations tend to have training budgets – leaving a gap in the middle.

**Assumption: Much voluntary-sector training is leadership training, rather than covering management essentials.**

This assumption has not been met. The available leadership training is balanced with a wide range of management training. Two of the most significant training gaps identified during the research were in leadership, not management.

## Key Findings

- **Both primary and secondary research demonstrated that leadership training is less accessible than management training.** More than two-thirds of available voluntary-sector courses are management, not leadership, according to the market map; and more interviewees said that was easier to access management training than said the opposite. Several people stated that they do not feel it is easy to access either type of training.

*“Both are hard... Unfortunately, in the voluntary sector we have a high churn of leaders and managers. You promote from the ranks, and you don’t have the training in place to nurture that role, and they end up floundering. They haven’t had the training. They don’t have the management skills and they don’t know how to lead.” Interviewee*



# Filling Training Gaps

## 1. Develop training courses in areas in which there are key gaps.

Priority level	Training content
High-priority areas	Financial strategy; equality, diversity and inclusion; monitoring, evaluation and impact reporting; organisational strategy; change management; risk management; project management; people management
Moderate-priority areas:	Financial management; stakeholder engagement; compliance
Low-priority areas:	General management; governance; leadership; volunteer management

Details are given under each sub-section below, covering course focus and availability; course design; mode and delivery; price points; and language and positioning. Developing training courses in areas of need – those in which high demand combines with low supply – is a medium-term recommendation; quicker wins are explored later in the report.

## Key Findings

### Course Focus and Availability

There are a number of areas in which the demand for skills is greater than the supply, making them priority areas for any future training offers. These areas are financial strategy; equality, diversity and inclusion; monitoring, evaluation and impact reporting; organisational strategy; change management; risk management; and project management. Areas of moderate priority are financial management; stakeholder engagement; and compliance.

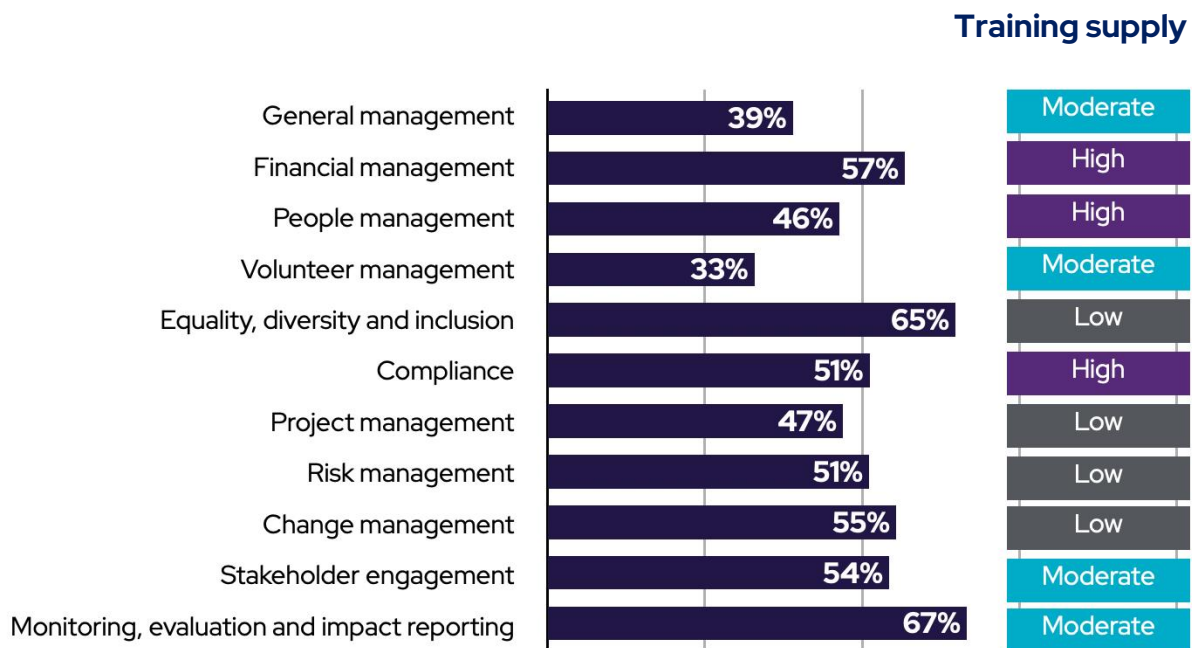
Areas of low priority – ones in which it is suggested that there is currently sufficient supply to meet the sector’s needs – are general management; governance; leadership; and volunteer management. While people management came up as a low priority through combined analysis of training supply and demand, it received a lot of attention by interviewees, perhaps suggesting a need for strengthened training that better meets sector requirements. Workshop attendees confirmed this need.

An introductory training package for emerging voluntary-sector managers is also needed, covering core areas such as resource management, people, premises and insurance.

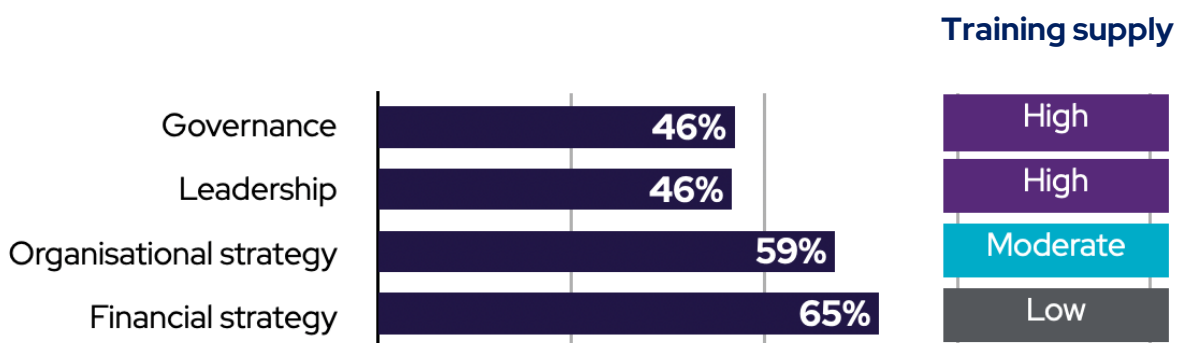


Workshop attendees called for a similar package to be made available for managers and leaders who have lacked any formal training or development. The graphs below show the proportion of survey respondents who want to develop skills in each main area of management and leadership over the next 24 months. These proportions have been used as a measure of demand when calculating priority areas. The graphs also show supply according to the availability of courses, which has been drawn from the accompanying market map.

**Percentage who would like to develop given management skills over the next 24 months** [survey; market map]



**Percentage who would like to develop given leadership skills over the next 24 months** [survey; market map]



- Where there is low demand, it may reflect a genuine absence of need.** Alternatively, it may be that the surveyed individuals do not perceive their own needs in these areas. It should be kept in mind that other gaps may exist – these might be identified, for example, if junior staff or beneficiaries were to be asked about skills gaps within the leadership and



management teams of their charities. While people management was a low priority according to the quantitative analysis, interviews and the validation workshop suggest it is, in fact, an important potential area of focus<sup>1</sup>.

- **While there are lots of courses available, there are also gaps in specialist supply of training due to the closure of voluntary-sector training organisations.** “The FSI were offering some really good training, but they are now gone,” said one interviewee, who said that availability has been further restricted by the insolvency of other training providers.

*“The landscape is getting really tough, and much harder than when I started. [Emerging managers] need to have a broader range of skills. You need to learn a lot more – especially when we don’t have an HR, finance or legal department. You have to become multi-skilled.”* Interviewee

### Course Focus

The table shows each area according to its priority along with key points drawn from interviews.

Area	Priority	Comments
Financial strategy	High	Key gaps: income diversification; fundraising strategies that cover core costs.
Equality, diversity & inclusion	High	Leaders and managers know it is an important gap, but may not have enough knowledge to understand what this gap looks like in reality.
Monitoring, evaluation & impact reporting	High	Key gaps: measuring outcomes, not outputs; how to measure soft outcomes; theory of change.
Organisational strategy	High	Key gaps: setting a bold, long-term strategy; growth strategy that fits changing needs; balancing values with organisational sustainability.
Change management	High	There was a lack of interviewee commentary on these areas. Options: (a) people only recognise these as important gaps when asked specific questions about them (as with the survey); (b) people have insufficient knowledge about these areas to discuss them
Risk management	High	
Project management	High	

<sup>1</sup> A workshop attendee highlighted a lack of available fundraising training. This falls out of the scope of management and leadership training, but it was nevertheless felt to be essential to leaders and managers.



		in detail; (c) they are relatively specific areas that require no further commentary.
Financial management	Moderate	Better financial management/awareness would enable managers and leaders to push back against funder expectations where appropriate. Key gaps: budgets; understanding restricted funding; implications of financial decisions; management accounts; fundraising; business reporting cycle.
Stakeholder engagement	Moderate	Key gaps: brand development; communicating with funders; liaising with trustees; engaging staff with financial/strategic information.
Compliance	Moderate	There is a particular gap for young charities who may have set up to meet a need without any background knowledge. Key gaps: data protection; safeguarding; insurance.
General management	Low	These are all areas for which demand is low, although interviewees discussed gaps relating to people management in depth – implying that while they may not themselves want people management training, they perceive gaps among their colleagues or within the wider sector. This was confirmed in the workshop.
People management	[High]	
Governance	Low	
Leadership	Low	
Volunteer management	Low	

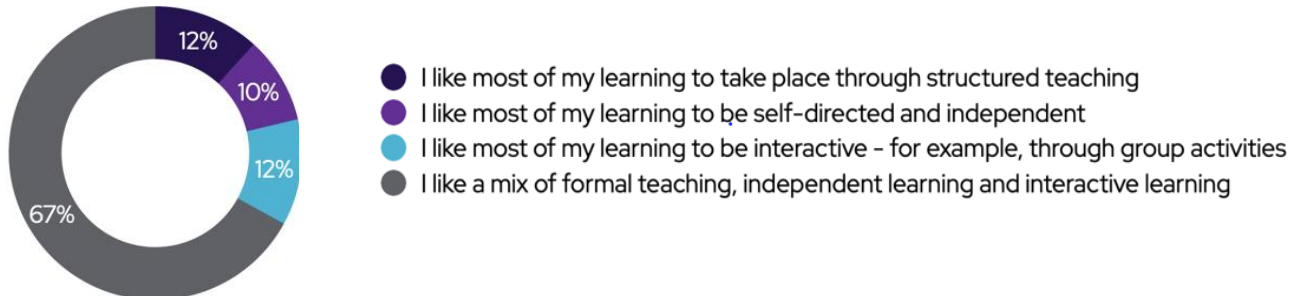


## Course Design

There are areas of cross-cutting content and design considerations for all courses. One of these is a recognition that management and leadership can be approached in different ways, and that it is important for individuals to learn how they best lead and manage according to their understanding of themselves and the people around them. Relationships are more important than information, and principles and tools are more important than scripts. Gaining a factual understanding on areas such as laws and compliance is critical, as is understanding the detail of implementation – not just the broad-brush strokes of what is required.

Good content can be supported by having real-world scenarios and interactive sessions through which participants can learn from their peers. Ideally, participants will have a similar level of skills and experience; this could, perhaps, be enabled by asking people to complete a baseline assessment of skills and/or experience before adding them to a cohort. Trainers will, ideally, have a background in the voluntary sector, and will have a good understanding of the contexts in which different models of management and leadership work best. They will understand real-life challenges and be able to communicate a vision of leadership and management that is flexible and pragmatic, and that avoids holding participants to impossible standards. They will know how to convert theory into reality.

### Course design preferences [survey]



- **There is a gap between the demand for training that is tailored to the voluntary sector and people’s experience of accessing such training.** While there is a clear need to tailor training to the needs of the voluntary sector, as set out in the Assumptions section above, only a third of interviewees said they had experience of training that had been tailored in this way.
- **Course design needs to take into account the real-world experiences of the charity sector and, if possible, an understanding of the localities in which training is delivered.** Interviewees also implied that design should account for the fact that in many small charities, managers have to develop multiple skill-sets in areas such as fundraising and human resources. It can be useful to ensure that trainers have an understanding of the different contexts in which leadership models might work.



- **There was little appetite for breaking down training into more specific sub-sectors within the voluntary sector, but it may be worth tailoring training by organisation size.** Charities in which leaders have to perform all HR and finance functions are very different to those in which dedicated leads exist. This means avoiding, for example, training that suggests small charities create a function through their (non-existent) human resources teams. Training may also need tailoring to individual needs, including neurodiversity.

Suggestions for training content and delivery, based on interviewees' past experiences of training, include the following:

- Embedding **interactive, shared learning** within course design. This enables individuals to learn from peers, who are often experts themselves, by pooling the collective knowledge and experience of attendees. According to one interviewee, "When an atmosphere of peer support and shared learning is created, that works really well. People learn from each other." This recommendation had the greatest weight of support from interviewees, with almost half mentioning it as being key. Group sizes inform how interactive it is possible to make a programme of learning. One person discussed optimal group sizes to allow participants to interact with others in the group, saying that 25 to 30 works in a room, while ten to 12 online is appropriate.

*"You learn as much from participants as you do from the material."* Interviewee

- Focusing on **relationships and connections** more than information. This means supporting managers and leaders to develop their ability to forge human connections. "Don't produce material that isn't how you would talk to someone in real life," said one interviewee.
- Going into sufficient detail, perhaps using **scenarios or case studies**, so that participants can work through problems fully. One person said, "If you have someone who is underperforming, you have to do a performance review or a capability [process], but they don't give you the deeper level of how you do this... What can you do in the early stages to mitigate it?" In another view, training should focus on the principles of leadership and management, not the details of implementation, recognising that people lead in different ways and need to be given the tools to work out their own ways of doing things.
- Being **realistic** about what attendees can achieve. One manager said, "Sometimes, you will get a trainer who will give you the ideal scenario, implying you should be doing everything. And it doesn't feel possible, and you can feel a bit dispirited. A more realistic scenario that is simpler is more useful."





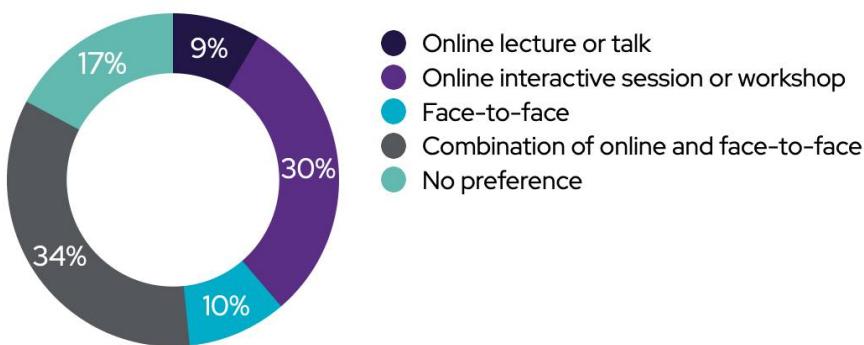
- Incorporating **tools based on practical tips**, where possible, to which trainees can refer back after the end of the course. These might include toolkits or workbooks covering areas like how to create a Gantt chart, how to use statistics and how to negotiate.

Other suggestions made by interviewees included having regular access to a single lead tutor when courses are delivered online; ensuring training cohorts consist of people with similar levels of skills and experience; and facilitating post-training peer support opportunities.

## Mode and Delivery

Senior leaders and managers are likely to benefit from short blocks of training over a number of weeks that allow both for day-to-day duties to take place alongside them and for real-world practice (which also helps to embed what has been learned). Emerging managers may require a longer block of time to develop a broad baseline of skills and knowledge that they need in their new or upcoming roles. A mixture of modes is likely to work best to meet the needs of different individuals and their organisations.

### Learning preferences [survey]



- **A mixture of options is likely to work best.** There is material variation in individual preferences, as well as in what their organisations can make possible. Survey respondents were slightly weighted towards those who prefer to learn online compared with those who prefer at least an element of face-to-face learning. 39% wanted to learn only online, 10% wanted to learn face-to-face, 34% wanted a combination and the remainder had no preference. Interviewees were clear that there is significant value in in-person contact, both in terms of learning outcomes and the building of long-lasting networks. There was a pragmatic recognition, though, that it is not always possible, and that costs – in terms of time away from work as well as course fees – can get in the way.
- **Different modes are likely to be more or less appropriate depending on the timing of training.** Online will almost certainly work best for a course that runs for an hour or two a week over a number of weeks, whereas face-to-face may be the most appropriate





option for a course lasting half a day or a day. It seems unlikely, based on the feedback of those who contributed to this research, that a course requiring more than a day in a single chunk of time is feasible, unless it is aimed at emerging managers.

## Price Points

It will be helpful to charities to have training available at a variety of price points. These could reflect the costs of putting different courses on – there could be free videos, perhaps available on YouTube, that people can download and watch at a time to suit them; live online courses with an interactive element would cost more; and the highest price points would be reserved for training that has an in-person element. Reasonable price points are around £40 for a one-hour module and £200 for a one-day training course, according to survey respondents, although the average of paid-for costs is less than this, at around £28 an hour. It will be imperative to articulate longer-term value to persuade charities of the need to make this investment in training.

### Cost of paid courses [market map]



- **Many organisations are unable or unwilling to pay for training, highlighting a need for free resources as well as paid-for courses** (as well as sign-posting; see Recommendations 3 and 4). Just over half the organisations of the people surveyed set a training budget, which averages £6,850 a year. The range was £400 to £50,000, and was generally higher for larger charities. The average that charities would be willing to pay for training (of those willing to pay) was £38 for a one-hour module and £202 for a one-day training course. 40% of courses in the market map are free, but free courses are often perceived to be low quality, training providers need to address this perception.

## Language and Positioning

- **Particular course titles and content summaries may be off-putting for some potential participants.** Simple language summaries can work well, as can those that are not overly corporate. On course titles, words such as “sustainability” and “inclusive governance” may be more appealing than the more traditional language of management and leadership. This was mentioned by a minority of participants, though. It was suggested in the workshop that the term “charity management” might be more appealing to the sector than “management”.



## Other Recommendations: Short Term

### 2. Develop an online map of existing providers.

Cranfield Trust will make available the market map provided as part of this research, which could be used as a starting point for identifying providers and courses. Providers could be listed along with sample course names, modes, course length, target audience and price. Another option would be to offer a list of upcoming courses, but this is likely to be too resource-intensive to be feasible.

Providers offering free courses should be flagged, for the charities that do not have a training budget. The map could usefully be accompanied by a list of funders who are willing to fund training.

The evidence for this recommendation is the same as the evidence used for Recommendation 3, so the findings are set out jointly underneath.

### 3. Set up weekly or monthly email bulletins of upcoming training courses to disseminate to charities, mirroring what is available internally for larger charities.

Some of this information could be pulled from the online map, minimising duplication of effort. While this recommendation was the joint second priority recommendation of workshop participants, it is recognised that it would be a considerable resource drain to pull this information together on a regular basis; A Google Sheet into which providers could update their forthcoming course information could be used to pull information relatively quickly into a regular bulletin.

## Key Findings

- **Whereas large charities may have lists of training courses that get distributed to staff via regular emails, people working in smaller charities often need to identify and source relevant courses for themselves.** Umbrella bodies are a popular source of information about training, including NAVCA, ACEVO and the Association of Chairs. Training providers are another; interviewees mentioned NCVO, Community Works, Getting On Board and the Directory of Social Change. Some people link to information offered by local training providers and universities, local authorities, local volunteer centres or local voluntary service councils. Others might use online searches, LinkedIn, CEO peer groups, word of mouth or organisations specific to their charities' focus.



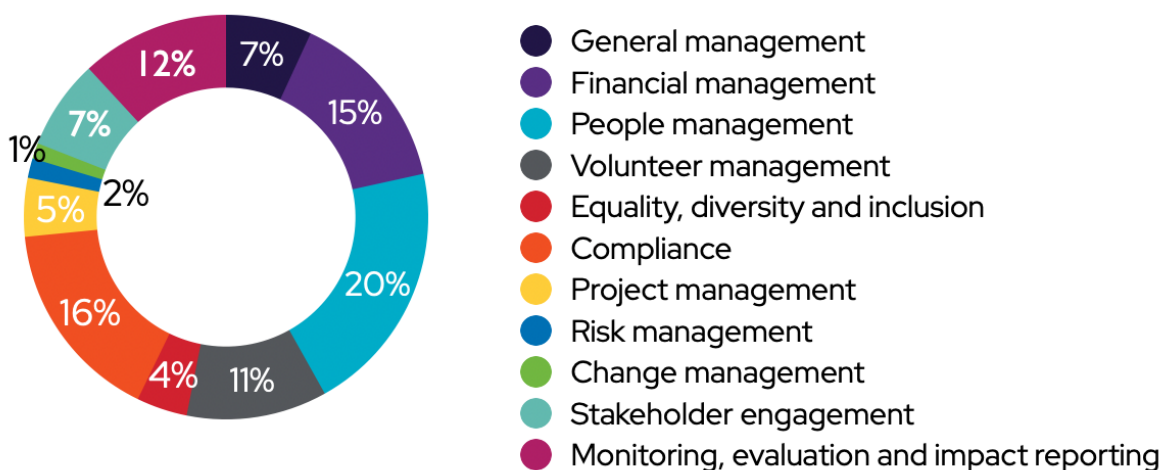
*“I have literally no idea how you would [find training information]. I don’t know what’s out there, what’s available, whether it is suitable, whether I have time. But it would be helpful, and I am open to learning.”* Interviewee

- **Managers at some charities can only undertake training if it is free.** This suggests a signposting function to free courses is likely to be a useful action point, alongside the quality assurance of both free and paid courses. The perception that free training is not of high quality needs to be addressed by training providers.

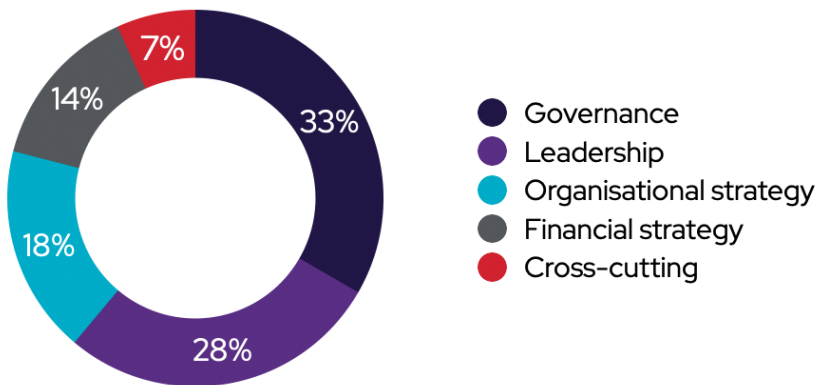
*“There are plenty of paid courses out there, where you can pay £200 a [time] and get reasonable training, but we prefer to access free, and the free stuff is not good. I’ve been looking everywhere.”* Interviewee

- **Information from the market map could be used as a basis to start developing information on upcoming courses, and also to publicise summary information about the types of training available.** Some of this summary information has been pulled out below and overleaf, showing the specific focus of available management and leadership courses, as well as the proportion of courses that have a focus on emerging managers, sub-sectors (e.g. social care or domestic violence) or regions, such as Cornwall or Scotland. The fact that almost half the mapped courses have a regional focus implies that the online map could usefully have a search or filter function according to learners’ location. A breakdown of provider type is also given.

### Focus of management courses [market map]



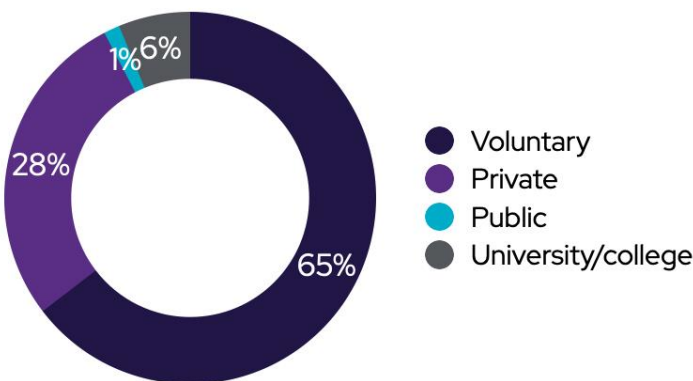
### Focus of leadership courses [market map]



### Specific focuses of courses [market map]



### Course providers [market map]



## 4. Consider the importance of accreditation.

Percentage thinking it is important/very important that (a) external learning is accredited (i.e. approved by a professional body), and/or (b) it leads directly or indirectly to a qualification, or offers CPD hours [survey]



- It was more important to survey respondents that their learning is accredited than it is that their learning leads directly or indirectly to a qualification, or that it offers



**CPD hours.** 41% thought accreditation was important or very important, compared with 27% for qualifications/CPD hours. The higher value placed on accreditation may reflect the quality concerns mentioned earlier, as it implies a minimum level of quality. Traditionally, learning is accredited by a professional body or other recognised institution – but some kind of charity-sector accreditation as a mark of quality may be useful.

## 5. Consider how to articulate the case for training amongst trustees, leaders, managers and funders

Some charities may not have considered how management and leadership skills can support them to run their organisations more effectively and to deliver better services; in other cases, leaders may be prioritising the development of team members over their own development, or failing to consider areas such as succession planning. Sometimes, they may lack skills their team members think they need, which they have not considered for themselves.

Articulating the case for training could be supported by promoting information on the benefits of management and leadership training for the voluntary sector, with information on expected outcomes; presenting at sector conferences on the impact of training; or writing think pieces for newsletters put out by relevant organisations. There is likely to be a particular difficulty in engaging those individuals who have skills gaps of which they are unaware. Whole-team training sessions might help with this.

### Key Findings

- **Almost half the organisations whose managers and leaders responded to the survey do not set a training budget.** Articulating the case for training, and showing the long-term value as part of this, may persuade charities to invest. One interviewee said she had not been able to access any training: “There is always the feeling that if we are not doing our core work, it is not the right thing to be spending donors’ money on.”
- **Managers and leaders do not always prioritise their own development, which has implications for how their organisations are run.** Two leaders were explicit about this point in the interviews, both of whom said that they could not justify spending money on themselves when training budgets could be used to upskill their teams. This was reflected by interviewees who had observed others making similar decisions. One said, “There is a bizarre thing – people may think about investing more in [emerging managers] than people in senior management.”
- **Dissemination of information about free and low-cost training (see Recommendation 3) may help to remind leaders and managers that it is available to them.** One of the consequences of unaffordability may be that individuals stop seeking



out training. "I haven't looked for some time," said one interviewee. "Whenever anyone says, 'This is the price,' I think 'Gosh,' and it always catches me out."

**Charities may also need support to develop a culture of learning.** One interviewee commented of a previous role, "There wasn't any opportunity to learn from those leaders who were already in place... There was never any opportunity to learn or shadow. They got on and did their job. I did mine." Developing a culture of learning also means giving more junior staff the confidence to access the training they need.

*"The feeling is, 'Am I worthy to go out looking for that training?' I also feel that when you are told, 'No, you may not have that,' that can have a personal impact. 'You are not worthy. You are not necessary.'" Interviewee*

- **Case studies on the difference made by training could help.** One workshop attendee suggested her organisation had solved their previous recruitment problem by prioritising training. "I think that that's really understood by our trustees –we get good people because we really invest in training, and they're making that link between recruitment and training and the calibre of staff and the retention of staff."

## 6. Help managers and leaders to embed training.

Training is more likely to have long-term positive impacts if what has been learned is embedded into the daily work activities of managers and leaders. There is little evidence to suggest that active steps are currently widely taken to embed training.

### Key Findings

- **There was little mention among interviewees of the importance of embedding training and ensuring that learning is not lost.** This implies that it is not an area to which managers and leaders give a great deal of consideration.
- **Charities often lack the time, resources and knowledge to consider what is needed in terms of training, according to interviewees.** Helping leaders and managers to articulate what they need may therefore be an important precursor to later embedding what has been learned in day-to-day operations. A lack of time, resources and knowledge can be a particular challenge in charities that have grown rapidly.
- **Managers and leaders may also need tailored support to remain fresh in their roles.** "You get stale in senior roles," said one interviewee. "Finding opportunities as a leader to prevent going stale is quite challenging."



## Other Recommendations: Medium-Term

### 7. Support leaders and managers to develop the skills to train and mentor their colleagues

Steps might include a specific training module that covers how to train others on the job, and a framework to support mentoring. This was joint second priority for the workshop attendees.

#### Key Findings

- **One way that interviewees have developed their current knowledge and skills is through on-the-job training, mentoring and coaching.** This implies that future leaders and managers – their more junior colleagues – may also benefit from being supported in the same way. It was suggested during the validation workshop that in place of a formal course, helping leaders and managers to learn how to train others would add value to time and money invested in training.
- **Advice on how to prevent attrition of information through cascade training models is a linked priority,** linking back to Recommendation 6 on how to embed training. As one interviewee said, “One person might go for training and then come back and train others, but it’s being diluted every time they do this.”

### 8. Offer an online management and leadership training needs assessment.

This will enable individuals to know what skills and knowledge they already possess and where their gaps are. This was the most important recommendation for those who attended the validation workshop – five out of seven attendees put it in their top three priorities, with another saying that it was important.

#### Key Findings

- **Leaders and managers are not always aware what training and development they need.** As one interviewee put it, “I don’t know what I don’t know.” Another was in a leadership position with no direct reports. “I am in a senior role, but I am in a silo. For me, it is hard to know what is the right training or development... as I don’t fit into the classic course-category descriptions.
- **“People may not be aware of the skills they need until it is too late.** “Everything is fine,” said one person, “and you can trust the Treasurer until something goes wrong – and then it can go very pear-shaped.”



## 9. Consider how best to keep leadership and management skills updated in those who may not have undertaken and learning for a long period.

Leadership and management training focus shifts across time, and staff may need support to keep up with changes. It might also be helpful to provide something specific for young, values-driven charities who have not yet got a handle on the practical, legal and financial implications of charity management.

### Key Findings

- **Training focus and content has changed since older managers and leaders may have first taken relevant courses.** One interviewee, for example, said that leadership and management training used to be focused around traditional areas such as project management, human resources and financial management. “More recently,” she said, “it’s [about] setting the culture of an organisation and creating inclusion. There is a lot around managing your own well-being and staff well-being, and managing change. Managers are required to do more on the hoof.” Needs may also change over the time. “At the time I joined [my charity],” said one interviewee, “it was easy to manage the money, as there wasn’t any.

*“Every decade, leadership and management has changed, and I’ve had to keep up with it to keep employed.”* Interviewee

- **Regular training updates may be necessary, whatever the basic skills levels within a charity.** “We fall between moderate and highly skilled, but always need training to keep on top of legislation,” said one person.
- **Some charities were established to meet an immediate need, and may not yet have undertaken the training needed for longer-term organisational development.** One interviewee had co-founded a charity in response to a significant local need. “We were just residents. We were not experienced community leaders... We made it up as we went along.” Another discussed increasing professionalisation in line with recent growth, which will include more training in future.

*“The charity was very small and has grown rapidly, and Covid was disrupting the world. We have a more established financial base now and new trustees on board. Now we think it is time to move on a bit with structure, organisation and support.”* Interviewee





## Additional Ideas

These are ideas that do not sit within the core remit of the research but that may benefit management and leadership development in the sector.

### 1. Undertake advocacy work relating to funding rules.

This could take two forms. The first is advocating to get funders to cover training lines within restricted funding budgets. It is incredibly hard for charities to access funding that covers training costs, which presents a risk to their sustainability. The second is arguing for fairness in funding relating to service referrals made by statutory bodies, so that their requirements of voluntary-sector organisations relating to training, and many other areas, are fully funded.

### Key Findings

- **Training budgets, where they exist, tend to come from unrestricted funds, which can be very hard to access.** One interviewee said, “How do you access funding to do [training] when funding is restricted? They won’t even let us buy a laptop without questioning it. Unrestricted funding comes from corporates, individual giving and major donors. Occasionally grants would cover core costs or training costs – but they are totally oversubscribed.”
- **Statutory bodies may refer people into charities’ services and make significant unfunded demands of these charities.** This point was raised by an interviewee in the context of statutory bodies who refer young people into the services run by small charities: “How [do you] deal with the fact that statutory bodies can’t, and won’t, pay for the work you’re doing – but that such huge standards are placed on us by those bodies?”

### 2. Support voluntary-sector leaders to understand how to re-engage disengaged trustees, or – from a longer-term perspective – help them to set up boards with people who will offer real and continued value to their charities.

This may be as simple as pointing leaders towards the resources offered by organisations such as Getting On Board and the Association of Chairs.



## Key Findings

- **Trustees may present barriers to management and leadership development through a lack of leadership that facilitates a learning environment or through gatekeeping of resources.** According to one interviewee, trustees “are a group of volunteers who have a mix of time, dedication and commitment”. Someone else had made a case to a board of trustees to attend a training course; the board said ‘no’, as they were unable to see the value of it. This finding also links back to Recommendation 5 on articulating the case for training to charities.

*“Your ultimate leaders can be a really mixed bag. That can be super beneficial if they are engaged – but it can leave you with no leadership or poor, uncommitted leadership.”*

Interviewee

- **As shown in the market map, Getting On Board offers a wide range of free training to trustees.** It also offers charities support in trustee recruitment and selection to ensure the right people support charities’ leadership.



## Recommendations for Charities Accessing Training

The following ideas, generated through the research, may be helpful for those charities wanting to access management and leadership training in the United Kingdom.

**Accessing up-to-date course information:** the market map includes courses that were live for bookings at the time the map was completed. Charities seeking up-to-date course lists may want to access:

- The [Directory of Social Change](#), which offers a wide variety of paid-for management and leadership courses.
- An [e-learning tool](#) offered at a discounted rate by the Institute of Leadership & Management for members of the Association of Chief Executives of Voluntary Organisations.
- [Eventbrite](#), which is best searched at the United Kingdom level (as so many local courses are online and can therefore be accessed from anywhere), using terms such as: charity management, voluntary sector training, etc. Many of Eventbrite's listings are available for free.
- [Getting On Board](#), which offers a variety of free training webinars for current and aspiring charity leaders.
- Lloyds Bank Academy, which has a [charity hub](#). It has not been covered in the market map as the sessions are mainly based around reading, but they cover a variety of useful, relevant areas – for example, understanding your market, developing a digital strategy for your charity and maximising your money.
- Local voluntary-sector networks and representative bodies, for those charities that have access to them. These often provide a range of management and leadership training for free to local charities. The National Association for Voluntary and Community Action helps charities to [find their local support group](#).
- The [National Council for Voluntary Organisations](#) (NCVO), which offers various paid-for, tailored courses for charity managers and leaders. Many of these are offered at a reduced rate for NCVO members.
- [nonprofitready.org](#), which has a huge variety of courses on topics including marketing, leadership, programme management, finance and human resources. While it is a US-based initiative, on-demand courses are available free to charities from anywhere.
- The [Open University's Centre for Voluntary Sector Leadership](#), which offers free online courses.
- [Udemy](#), which has a variety of relevant courses available.



- Webinars on YouTube and other sites that are generally free and tailored to the sector; for example, this [webinar series](#) from Bond.

**Courses that are focused on management and leadership without a sector focus:** only courses with a voluntary-sector focus, or those run by providers that specialise in the voluntary sector, have been included in the market map. There are many areas, however, that do not necessarily require a sector focus in order to be useful – for example, supporting staff who are absent through sickness. [ACAS](#) offers a range of general courses that may be useful here, as does [Happy](#).

**Particular requirements for managers and leaders from very small charities:** there may be a need for managers and leaders in micro-organisations to source training for skills that have not been covered during this project – for example, basic social media or first aid. Some of the main sources outlined above are likely to be useful for these.



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