

BUSINESS & STRATEGIC PLANNING

Families in Grief was founded in 2006 to provide bereavement support to children and families in North Devon and Torridge over the phone, face to face, as bereavement champions in schools and via a range of support leaflets online. In 2023 the charity supported 123 families and 188 individual children and young people.



The Issue

Families in Grief came to Cranfield Trust for assistance in developing a strategic development plan for the next 2-3 years, and for advice and guidance on growth and strategy.

The strategic development plan was to include an income generation plan that would help to improve the charity's sustainability in the long term by diversifying the sources of income and focussing on unrestricted income to reduce the reliance on grant funding. We agreed to call the project a Sustainability Review to cover all aspects of the organisation's future operations and growth, and not just fundraising, and we added an Action Plan to focus the effort on the specific activities that are going to help to achieve sustainability, who is responsible for those activities, and to what deadline.



'This was an invaluable process. Thank you for the opportunity to go on this journey with professional support.'

CEO Naomi Jefferies



Solution

The deliverable became a Sustainability Review and Action Plan with clear steps in the transition of the charity from where it was currently to a more sustainable model, backed up by raising a diverse range of income, with as much unrestricted funding as possible to enable the charity to support its beneficiaries per its mission in an increasingly challenging financial climate. Devon based volunteer consultant Paul Rodgers was matched to the charity and worked directly with the CEO Naomi Jefferies.

Naomi and Paul met regularly and tracked their progress throughout the project using an action plan with set dates to review the actions.



‘With the best will in the world – you are pulled from pillar to post in a small charity and don’t always have this time to focus and properly reflect.’

CEO Naomi Jefferies



Naomi appreciated having a local volunteer, living in the area and understanding the locality, but also with a much wider world view, as it helped her to think about what is possible without being unrealistic or playing too safe. Naomi explained:

‘I think what has been particularly helpful is having Paul, as an objective, very experienced professional, ask sensible and curious questions – ones that made me step back and really think about why we do things in a certain way – and what we are doing things for. Paul’s manner was calm and considered and I really felt he cared about what happened for our charity and beneficiaries. There is a selflessness in this mentoring process which makes you feel supported rather than judged.’

Impact

The project is designed to help the charity to fund its future strategic growth so that it is available to its beneficiaries for many years to come. Specifically, the CEO wants to improve ongoing resources in schools, increase the number of professionals who have a shared knowledge and understanding of how best to support bereaved children and young people, expand and widen the offer to include groups, 1 to 1s, bespoke groups, as well as working with other organisations to connect people and tackle isolation especially as experienced by young people dealing with bereavement. Naomi believes that the support received from Cranfield Trust during this project directly improved the charity's fundraising success:

“**We now have the funding totalling approximately £60,000 per year over the next three years for front-line support and a plan to ensure this continues.**”

Naomi also found the Journey to Excellence © (J2E ©) process particularly helpful in reviewing her organisation holistically and being able to quantify how far they had travelled since starting to work with Cranfield Trust. Overall, the charity moved 9% closer to Excellence over the period of the project, and 13% closer in the area of the project, Leadership and Strategic Direction. In carrying out the post-project J2E assessment with Regional Manager, Marie Langan it was established that:

- The charity now has a sustainability plan and clear steps as to where it is going and when
- As a result of the project, and Paul's encouragement, the charity has increased its contact database significantly
- The project helped the charity to focus on its finite resources
- The charity now has a robust fundraising/income strategy, and recently successfully bid for three grants it wasn't expecting to receive!



Naomi concluded by saying that she enjoyed working with Paul:

'Paul took time to really understand our charity and the challenges of sustaining income in our locality. He asked clear and supportive questions that encouraged me to think about and prioritise income generation strategies, and to take some bold steps forwards!'



And the project was a positive experience for Volunteer Paul too:

'Families in Grief is a professional and highly regarded small local charity, led by a CEO who is passionate about providing care and support to young people and their families, in times of need.'

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