



Charity Mentors

Impact Evaluation: one year in

Ann Buchanan

Introduction to Impact Assessment

Charity Mentors was formally launched in May 2013, by which time it had already piloted a model for mentoring by high level mentors who were at a stage in their careers where they were able to 'give back' in terms of their leadership and strategic expertise. Over the course of the next 16 months Charity Mentors appointed a coordinator, placed mentors with over 30 organisations, processed feedback from those projects, refined its model and worked to produce protocols for all processes.

Charity Mentors is managed by a Steering Group. This team sets the tone for governance and monitors Charity Mentors' activities. It also resolved:

- To investigate registration as a charity;
- To build a 'template' for the model so that it can be replicated in other counties;
- As a basis for this template, to explore the impact of the mentoring intervention and to incorporate any learning from it.

A member of the Steering Group has many years' professional experience in social research and offered to conduct an Impact Assessment on behalf of the team. Professor Ann Buchanan is Senior Research Associate in the Department of Social Policy and Intervention, University of Oxford. This report summarises Professor Buchanan's findings.



Marion Stevenson
Chair of Charity Mentors Steering Group

What is Charity Mentors?

Charity Mentors offers pro bono short-term mentoring for charities with strategic challenges.

Mentors are senior leaders, credible in their own right, who have a range of experience and strategic expertise in the commercial and voluntary sectors. They offer active support and an independent standpoint for a defined period, without taking over responsibility for decision-making, which remains with the Board of Trustees. They help charity leaders actively shape the future in a practical and sustainable way.

The project brings together the expertise, skill, good will and resources of local professionals and businesses to support community enterprises in Oxfordshire at critical moments.

The Impact Evaluation

The purpose of the evaluation, was to obtain feedback at least six months after the completion of the mentoring process on what impact the mentoring had had on both the organisation and on the mentee. Thirteen organisations that had completed their mentoring were approached by Ann Buchanan and all agreed to take part in a telephone interview. Participants were told that everything they said would be confidential unless they gave specific permission to have their organisation mentioned. Those who were willing to give their names are noted at the end of the report.

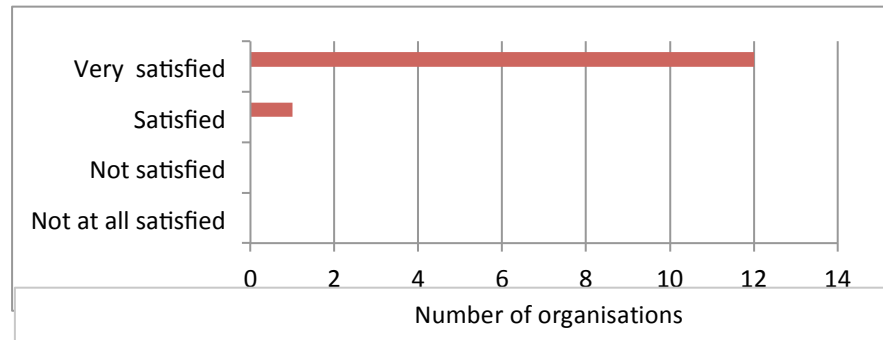
Key findings

1. Overall there was a high level of satisfaction with the serviced offered by charity mentors. Twelve out of thirteen organisations were completely satisfied with the service they received. All organisations would recommend the service to other charities.
2. Many charity leaders mentioned the sense of isolation they felt and all acknowledged the value of the opportunity to reflect which brought focus and clarity. They said that if they had not had a mentor they would have had to cope somehow, using phrases such as 'struggled on' or 'bumbled on'. Again and again mentees said that the mentoring gave them confidence to be the leader.
3. Most charities valued the short-term model in terms of giving a framework, helping them to achieve specific goals and maintain focus. One or two organisations, however, felt they may have appreciated a longer relationship as their problems were more entrenched. Also mentioned was the value of being given 'homework' between sessions as this helped keep focus.
4. The skills and experience of mentors were key. People appreciated the high level of expertise in management and business planning and most felt that this could not be found elsewhere. Some were apprehensive about working with someone with this level of experience but generally found that the mentor could transfer this knowledge to the different situation. 'Matching' was important in terms of the issues, but not necessarily in terms of context.
5. The main issues raised were: strategic help with option appraisal and business planning; leadership, delegation and relationship with Board; funding issues; review and signposting regarding specific professional advice needed. Of these categories by far the most usual was a strategic challenge.
6. There was strong support for the idea of an annual review being on offer, perhaps with a different mentor.
7. Size of charities: charities ranged from small local charities meeting the needs of weekly gatherings of local elders to large charities with a turnover of £5 million plus per annum.

1: How satisfied were mentees with the service they received?

Twelve out of thirteen organisations who had received help from Charity Mentors and who took part in the telephone interviews were very satisfied with the mentoring. One organisation found the mentoring helpful but felt their issues were too complex to resolve in the short time frame.

Levels of Satisfaction with the service provided by Charity Mentors(N=13)



Completely satisfied

Outstanding service for a CEO of a small charity to obtain that level of expertise.

It was a fantastic opportunity to come away from the work place, be objective, have input from someone with a lot of experience and talk about the issues you wanted to tackle.

You get a solid mentor with good experience, completely independent and confidential.

Despite their backgrounds, the mentors understand normal people. They are like a bridge between the two worlds. Also they are on your side.

A team of skilled professionals – people who are willing to give time and share their skills – an injection of capacity to small organisations to help them move on.

Satisfied

I would recommend Charity Mentors for run of the mill problems. Ours were a little too complex for three sessions.

2. How had they heard about Charity Mentors and what were the issues they brought?

Broadly there were four routes for approaching charity mentors. Six charities received a personal recommendation; four had been referred by OCVA, and the remainder had responded to a global email.

The issues that brought them to Charity Mentors fell into four areas. Some charities had a particular crisis impending, usually related to decline in funding and they needed mentoring to guide them through the restructuring process. Others, however, wanted help in growing their organisation and planning new projects. For some charities, inactive trustees were a particular concern. The largest group, however, were CEOs, some of

whom were new to their post and who wanted support/ mentoring to improve their leadership skills. One charity wanted specific help in obtaining, and interpreting legal advice relating to a property lease which was about to be withdrawn.

Crisis impending

Major source of funding due to end.

At a difficult stage. Threatened with closure; money; issues of viability and also diversity. We had a group which was quite threatened with various issues; money, people's time.

Growth and change

As an organisation we needed a strategic review... various new projects... which way should we go? Needed someone to guide us through.

Needed organic help – rapid growth in service. Needed to be more professional with our finances and fundraising.

We wanted to upscale but because we were a small organisation we did not know how to go about it with a lack of resources. We were going round and round in discussions with trustees.

Help for Charity Leaders

I was new in post as a CEO and although I had lots of professional experience I had less experience of running an organisation and in particular of fund-raising and financial know how.

Charity CEOs are very isolated. You have good trustees but no one with whom you can reflect.

Not easy running a small charity. Need to have someone objective with whom you can check out ideas.

I had just taken over the organisation as CEO...needed support.

I needed to talk to someone from a related sector but with wider knowledge

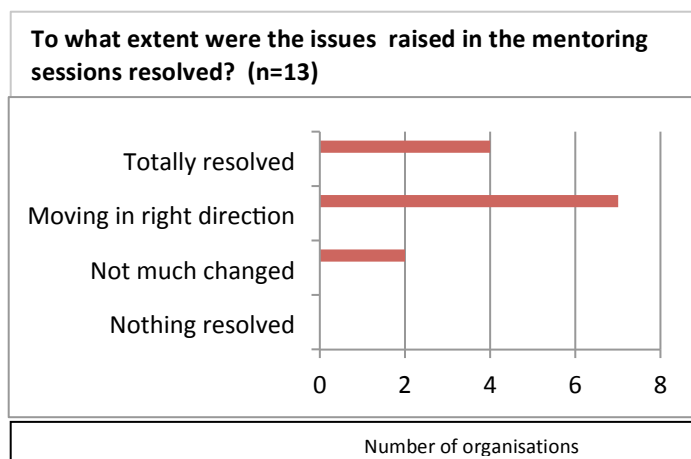
I needed help in running a business.

Help in obtaining legal advice

We have been running our club in same building sinceLandlords put the building up for sale. Complicated situation and I was not sure they had the right to do this.

3. To what extent were the issues raised in the mentoring sessions resolved, and to what extent was the future direction of the organisation influenced by these sessions?

Some charities felt they had resolved all the issues discussed, but most felt they were moving in the right direction and this movement had been facilitated by the mentoring sessions.



Totally resolved

It was fantastic help. The mentor outlined the work task and a potential approach.

Yes, and I now have a very effective colleague. I am also much more confident in handling financial matters.

It was good to have someone with good experience who you could use as a sounding block. Also to keep us focused on the task rather than the day to day activities. We have made good progress.

It was a huge learning curve. A confidence booster. It made a big difference.

By chance several large grants came through...

The future of the organisation has been very much influenced by the mentoring. . Also my relationships with trustees as a manager are better.

Moving in the right direction

Because of the nature of the tasks, the mentoring was very helpful. It identified strategic options. Public sector cuts meant that there may be diminishing financial support. The mentoring helped the organisation come to a strategic direction.

The Mentor discussed the running of the association and what changes were needed. Mentor suggested the value of forming subgroups... Also helped with my time management. Things, however, are still difficult.

Mentoring helped with strategy, fundraising, looking at long term and short term. Overall affirmed what we were doing.

We were going round and round in our discussions with trustees. My mentor picked up the lack of clarity and asked who was driving the organisation and queried the role of trustees. This conversation was really good. We came up with business plan which the charity has now started to implement. Mentoring was highly beneficial. We were lucky to get the right individual.

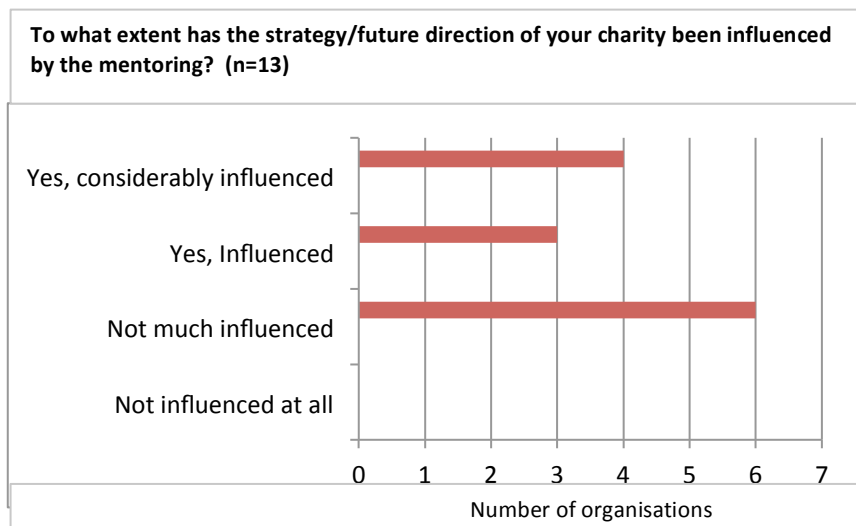
The mentoring was less important to the organisation. But improved our financial management.

Situation is still uncertain. But CM (Charity Mentors) helped more than anyone.

It was good to discuss the issues. The Mentor was a very nice person. Mentor introduced me to other organisations in the field but our difficult situation is still ongoing.

4. How important was the mentoring to the performance of the mentee and how important was it to their organisation?

All mentees felt the mentoring process had been empowering. The main benefit was improving their confidence to do what needed to be done. Again and again mentees mentioned how it gave them confidence. Also mentioned was the fact that the mentor added value, helped open out options and helped give clarity and focus. Many people said that if they had not had a mentor they would have 'struggled on in house' or 'bumbled through' or 'carried on blindly'. Mentees really appreciated that highly skilled and experienced people were willing to give their time freely. Every participant apart from one felt better equipped to deal with issues as a result of the mentoring. 'Things are a lot better. It has given us all focus. When it came to the organisation, the mentoring had a huge difference to seven organisations, but for others the impact on the organisation had been less, though still influential to a greater or lesser extent.



Support for mentees

It gave me much more confidence. I was very upset... It was nice to know that there were people out there who were willing to help ordinary people.

The mentoring was very important as gave confidence. It was a critical friend who was on your side.

I knew what I had to do but mentor came up with some ideas on how to do it.

It was very helpful to me. It affirmed what I might have done and gave me confidence.

Helpful for organisation

Because of the nature of the tasks, the mentoring was very helpful. It identified strategic options. Public sector cuts meant that there may be diminishing financial support. Helped the organisation come to a strategic direction.

We now have a better understanding of what we need to do if situation gets difficult again

Saw that I needed to delegate more, build up the team and bring in new people

Sometimes less important to organisation

...But the support to the organiser filters down to organisation.

It did help the organisation

Not so important, but did give help in specific areas.

5. To what extent was the background and experience of the mentor important?

Most felt that the matching of mentor and mentee was very important. Some were initially concerned by the high status of mentors, but once they worked together, they found the mentor was able to use the skills and experience gained from running a much larger organisation to relate to their situation. Others chose a mentor with specific experience in their sector but actually found they were focussing on another area. The ability to choose the sort of person and skills of the mentor was highly valued.

Good match

The background was definitely very important. He was a solicitor and knew others who could help.

Very helpful. Mentor had a lot of experience of working with trusts and fundraising.

It was good to have someone outside yet somebody who knew the field.

Became something different

It was important that the mentor had a good understanding of the Charity Sector. Although the mentor was from a financial background and did not particularly have fundraising skills, the financial background was very helpful.

The high Status of mentors

His background in running a very large organisation could have been an obstacle but he was able to use his experience to think around our systems. Matching is very important.

I was concerned is that some of the mentors appear very high powered and may not understand smaller organisations so I chose a person with similar professional experience

to my own. This was good because the mentor understood my issues, but on reflection it may have been better with a more business/strategic person.

There are pluses and minuses in the matching process. Knowledge of my area was useful and important, but the mentor was used to dealing with much larger organisations. Some of the suggestions were a bit out of our reach for an organisation of our size.

I think I really needed someone with smaller scale experience. Nevertheless the CM's experience was useful.

6. Charity Mentors model: short-term, goals, strategic – was this helpful?

Most mentees liked the short term model. Knowing it was short-term helped focus the mind. Almost all the mentors were asked to do homework. Mentees felt that being given 'homework' to do between sessions helped structure the sessions. In effect, the range of time spent with mentees varied from one or two hours face to face, to three or four sessions of two or more hours. Two charities had more than 20 hours of mentoring. There was a strong call for further sessions, such as annual review, using either the same mentor or another mentor with different skills.

Short term, goals strategic model

Yes, for me it was useful as I knew it was short term. I was not able to become dependent upon the mentor... you knew where you were.

It was useful to have a clear timeframe.

It was a very useful model of work. More accessible and appropriate... I was not committing us long term.

But longer may also be useful

Depends on what you want. If you want help with a business plan, this can be done in a short time frame. Others may need more time.

The down side is I would have liked more. Three months is short for someone just new into post.

Use of 'Homework'

I found this helpful. Otherwise I would have gone back to the day to day situation and not thought things through. It was good to be given tasks to do.

I was working on the review and sending him drafts which he commented on promptly. It was good to be given tasks to do.

Some mentoring did actually go on for longer

Our mentoring went on a bit longer than originally suggested. Even so it was short term and strategic

I actually spent around 12-15 hours with Mentor. I appreciated that the mentor was flexible.

One charity felt that a longer input was needed for charities with more complex problems

I needed longer term support. Short-term is OK for run-of-the-mill problems. Nevertheless the CM's experience was useful.

An annual review?

I think you need help at two levels: 1: for new CEOs as longer term mentoring system and 2: short term strategic input for special projects.

An annual review might be very helpful. I may, however, want another mentor who had a different range of skills. Although I really appreciated my mentor.

Yes, CEOs take a pounding. Trustees important but generally do not want bad news. An annual review is a good idea... But an annual review with a different mentor who has different skills may be useful.

7. What other help is there available?

All charities had their trustees, but some were more active than others. Given the isolation felt by many Charity CEOs, some had developed their own networks of managers in similar organisations. But these managers were not able to give individual attention and time to the mentee. Some professions such as nursing and teaching have a strong tradition of mentoring and those moving to the charitable sector where there was not this culture missed this support.

Apart from Charity Mentors, OCVA was highly thought of, but most felt Charity Mentors brought something different to the table with their skills and experience. It was recognized that to pay for similar quality mentoring might have been expensive.

Trustees as supporters.

I have a good board of trustees but as a CEO you are on your own.

CEOs take a pounding. Trustees important but generally do not want bad news.

Networks.

We do have Oxfordshire Rural Community Council, Cope UK, Oxford Community Market. But these give different sort of support. For me the mentor had experience over and above other groups.

Mentor gave quality time and brought experience, thoughtful. Added value.

The Hospice world is very good at sharing. We have a Regional Executive and networks of Hospice workers. There is help and there is expertise about. But CM was a bit different as it was independent and confidential.

OCVA

OCVA can be very helpful.

OCVA can be very useful, but they do not give the same level of support nor have the experience of a mentor.

Needed more training. Following mentoring sessions, I realized I needed more help so I joined a training group given by Haddon Training

Would have had to pay

If you have the money there is help around

Would probably have to pay an accountant. Hard to know what you would have to pay for the quality of the advice given by Mentor.

8. Would you recommend the service to another organisation?

All participants answered this positively. 'Definitely'. 'No doubt'. 'Yes, I cannot see why you wouldn't use it. It is a gift horse'.

9. How would you describe the benefits of working with Charity Mentors?

Overall almost all those who spoke to Ann Buchanan, as can be seen from the Satisfaction Ratings at the start of this report, felt Charity Mentors had given them an exceptional service. The experience and skills of the mentors and their willingness to give time to help was particularly appreciated.

It was a fantastic opportunity to come away from the work place, be objective, have input from someone with a lot of experience and talk about the issues you wanted to tackle.

The mentors are a team of skilled professionals – people who are willing to give their time and share their skills – an injection of capacity to small organisations to help them move on.

10: Conclusion: way forward

This impact evaluation gives strong support to the Charity Mentors model. The main elements are:

- Mentors should have a high level of seniority and leadership experience in management roles
- There needs to be careful matching of mentors in terms of interests and issues
- There should be a focus on strategic and planning challenges rather than technical expertise
- There should be clear boundaries for the short-term nature of the projects
- The model focuses on the value of 'mentoring' rather than 'advising' in terms of enabling charity leaders to build confidence and take responsibility
- The evaluation highlighted the importance of follow-up for charities and feedback for the organisation

A plan to create a template for the service is described in Appendix A.

Appendix A.

Having received funding for creating a 'template' Charity Mentors now proposes to outline all processes, protocols and structures for setting up a similar service. This excludes legal structure, which will be determined by specific circumstances of similar services, but it will include:

- A. How to initiate a service – an overview:
 - Governance – the steering group, who needs to be involved
 - Setting meetings
 - Other stakeholder who need to be consulted – e.g. CVS and CF
 - Creating a marketing plan
 - Seeking coordination/administrative help
 - Seeking and interviewing mentors
 - Making the contract – expectations
 - Establishing protocols for referrals
 - Establishing protocols for feedback
 - Establishing training and support needs of mentors

- B. Materials
 1. Job descriptions for coordinator and director.

 2. Code of Practice and governance. (Check European Mentoring Assoc Compliance) To include:
 - Confidentiality.
 - Dealing with complaints.
 - Professional indemnity. Clear statement of circumstances where it would not be required.
 - The role and composition of the steering group.

 3. Marketing Support. To include:
 - Website (which could be used as a gateway for all the counties). This should include a closed "bulletin board" where coordinators could post questions for follow-up and discussion. Roz to manage for one-year, and then 'self-managing'.
 - Building a relationship with the relevant CVS and the role of other partners.
 - The "pitch".
 - The importance of positioning.
 - Brochure and supporting marketing literature.
 - How to use feedback.

 4. Mentors Package. To include:
 - Mentors' job description.
 - Recruiting and interviewing mentors.
 - Mentor training (initiation session and ongoing).
 - Mentor support and communication (newsletter, mentor meeting suggestions and outlines).
 - Mentors' performance evaluation procedures and exit strategy.
 - Mentors' contract. To include:
 - ✓ What is mentoring?
 - ✓ Expectations about training (obligatory initiation session, and minimum number of mentor meetings per year).

- ✓ Expectations regarding availability.
 - ✓ Outline of evaluation procedures.
 - ✓ Feedback expectations.
5. Background to mentoring. To include:
 - What is mentoring? (This is to ensure that Director and Coordinator understand the concept).
 - How to convey this to your clients.
 6. Templates. To include:
 - Referral Form.
 - Mentor Feedback.
 - Client Feedback.
 7. Managing the process. To include:
 - Outline of the referral process.
 - Monitoring project progress.
 - Frequency of meetings between director and coordinator.
 8. Funds and resources needed to set up a new service

Appendix B.

How the evaluation was undertaken:

- a) Letter was sent to key contacts in 14 organisations six months after the completion of their mentoring asking if they were happy to take part and assuring them of confidentiality if they so wished.
- b) The CEO in one charity was unable to be contacted as she was ill, so the final sample was 13. The following was the questionnaire used in the telephone interviews:

Charity Mentors Evaluation

Person spoken to: _____ Name of organisation: _____

Thank you for giving me a moment of your time. The purpose of my call is to obtain your views on your experience of Charity Mentors and to learn how we can improve the service for others who ask for help. When I have spoken to every organisation involved, I will collate the findings and share them with Charity Mentors so that they can use the findings to improve their service. Everything you say will be confidential. No organisation or person will be identified unless they give specific permission to do so. The call should take no more than 20 minutes. Are you happy to continue?

- 1: Can you tell me how you heard of Charity Mentors?
- 2: Why did you decide to approach them?
3. What were the main issues that were a concern?
4. To what extent have the issues raised in the sessions been resolved?
5. To what extent has the strategy/future direction been influenced by the mentoring sessions?
6. What would have happened if you did not have a mentor?
7. Does the organisation feel better equipped to deal with such issues as a result of the mentoring?

8. In retrospect is there any way in which the mentoring session could have been more helpful?
 9. How important to *your* performance was the mentoring?
 10. How important to the performance *of your organisation* was the mentoring?
 11. To what extent was the background and experience of the mentor important?
 12. Was the model: short-term, goals, strategic – useful for you?
 13. How many hours did you spend with the mentor?
 14. Did you have any homework to do between sessions?
 15. What other sources of advice for support is there that you might have used?
 16. Can you see a situation in the future where it might be useful to have more help from Charity Mentors?
 17. Would you recommend the service to another organisation?
 18. If yes, how would you describe the benefit of working with Charity mentors to that organisation?
 19. How satisfied with the service you received not at all 1 2 3 4 very satisfied
- Thank you so much for your time. What you say may help other organisations.

Acknowledgements

Professor Ann Buchanan is Senior Research Associate in the Department of Social Policy and Intervention, University of Oxford. She is a member of Charity Mentors' Steering Group. Charity Mentors is most grateful for her generous donation of her expertise, skills and time in conducting the interviews, evaluating the responses and compiling this report.

Charity Mentors would also like to say a particular thank you to all those organisations who gave time to answer questions for this evaluation. Those who took part were: Gladiators Club, Henry, Oxford Outdoor Learning Trust, Talking shop, Katharine House, Full Circle (CEO now employed elsewhere), Coin, Student Hubs, and five organisations who preferred to remain anonymous.

Oxford, August 2014