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**Final Report:**

**Evaluation of NLHF funded business support programme 2021-2022**

Prepared for:

Museum Galleries Scotland

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Prepared by:

Linda Roddie

Account Director

Axiom Research & Consultancy

27 Woodside Place

Glasgow

G3 7QL

Tel: 0141 212 7980

Email: linda@axiomconsultancy.co.uk

www.axiomconsultancy.co.uk

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**Section 1: Background to the Business Support Programme**

**1.1 Introduction**

Museum Galleries Scotland (MGS) is the National Development Body for museums and galleries in Scotland. Consultation with the heritage sector identified the need for heritage organisations to develop sustainable and resilient business models to enable them to move forward, addressing the economic and workforce challenges developing in the sector, as well as those arising from Covid 19 and its impact on business viability.

A partnership between the National Lottery Heritage Fund (NLHF), MGS, Build Environment Forum Scotland (BEFS) and greenspace scotland developed a leadership programme for heritage organisations which aimed to build capacity amongst the heritage workforce to effectively lead their organisations through turbulent times.

An 18-month resilience and leadership programme (Surviving to Thriving) was created to provide tailored development for 40 organisations (approximately 80 people) across Scotland on leadership, governance, business planning and community engagement. Each organisation was to receive 20 - 30 days training and were provided with a community grant to enable them to participate.

The Programme sought to deliver key outcomes for participating individuals and their organisations, as well as delivering wider benefits to local communities. It is aimed to contribute to addressing sector-wide skills gaps and workforce development issues and the need to change business models to address the economic challenges associated with ongoing reductions in income and changes in visitor engagement patterns.

**1.2 Drivers for the Programme**

**1.2.1 Character Matters**

Recognising that the sector was experiencing significant change, research was conducted in 2016 to identify the attitudes, behaviours and skills needed in the UK museum workforce for the next 10 years and to explore how museums could recruit or support people to address these issues. Feedback from over 2,000 individuals identified a range of issues, including:

* A drive towards more stable and financially resilient museums, with more diversified income streams
* A need for a more diverse and flexible workforce, combining specialisms with broader skills and knowledge, to support this
* A need for improved collaboration in terms of sharing resources, knowledge and ideas
* Gaps in key skills related to leadership, income diversification and digital skills
* A need to enhance a range of “personal qualities” including optimism, motivation, self-efficacy, persistence, curiosity and creativity.

The research also recommended key actions for sector bodies to address some of the issues outlined in the study:

* Creating funding opportunities to support skills and knowledge development throughout the sector with key areas including developing and applying digital skills, developing further business, management and leadership skills
* Creating funding opportunities to support workforce development, particularly supporting groups within the sector who unite around a common focus, such as their geography, specialism or community of practice
* Developing a range of new, museum specific short courses aimed at current skills gaps, such as business, management or interpersonal skills where appropriate
* Developing programmes to help leaders grow within their organisation and into leadership positions, and to develop leadership training for all segments of the workforce, not just senior level staff.

**1.2.2 State of Heritage Funding Now**

With increasing pressures on public spending, reductions in National Lottery sales, concerns regarding the potential impact of Brexit on overseas visitor numbers and a reluctance in the sector to access private sector funding, a research project aimed to assess sector resources and fundraising and changes in the funding landscape.

The research suggested that support was required to

* Assist heritage organisations in diversifying their income streams
* Encourage opportunities to collaborate with partners as part of place-shaping initiatives as a means of attracting national lottery funding
* Developing training programmes to support heritage organisations in developing the commercial and business skills to capitalise on future increases in visitor numbers.
* Developing training to enhance skills in influencing funders, identifying, recognising, managing and maintaining funder relationships’ strategic planning for fundraising, advocating the value of the organisation and developing a fundraising strategy.

**1.2.3 OPIT Skills Investment Plan 2019**

Scotland’s national strategy for the historic environment, Our Place in Time (OPiT) recognised that a skilled workforce is crucial for the future needs of the sector and that a lack of appropriate skills is a threat which could impact on the management, protection and conservation of the historic environment. Skills is one of four cross-cutting priorities within the strategy and to address this an OPiT skills and expertise a sub group was established to develop, monitor and implement any agreed plan and actions.

The strategic review which underpinned the Plan, identified several skills gaps in the sector, the majority of which are generic business-related skills, namely:

* + Digital
	+ Leadership and management
	+ Business
	+ Financial and budget planning
	+ Customer service
	+ Marketing.

**1.2.4 Museum Galleries Scotland – Support Programmes**

In response to the skills needs of the sector, MGS developed a range of development support programmes which preceded the Business Support Programme.

*Skills for Success*

The programme, which was funded by the National Lottery Heritage Fund (NLHF), enabled non-graduate learners from a range of backgrounds to undertake a one-year paid placement in museums and galleries throughout Scotland. Twenty 20 individuals participated in an entry-level learning placement and two completed management-level placements.

An independent evaluation of the Programme indicated that it had a substantial impact on those involved, including participants, mentors, supervisors and other staff involved in delivery.

*Heritage Horizon’s Traineeship Programme*

Funded by a Heritage Lottery Fund (HLF) Skills for the Future grant, the Traineeship programme was designed to provide opportunities for 20 non-graduates to take part in a structured 12-month, work-based training programme which included an SVQ Level 3 qualification in Museums and Galleries Practice which was developed especially for the programme. The programme aimed to address skills gaps, improve training resources, and diversify the workforce by encouraging applications from non-graduates who would not usually apply for posts in the sector.

An independent evaluation found that the programme had enhanced skills, increased confidence and employability amongst participants and that the payment of a stipend had been vital in enabling trainees to participate. In addition to benefits to participants, the evaluation also identified benefits to organisations hosting participants and to their wider workforce.

**Section 2: The Business Support Programme**

**2.1 Desired outcomes by partners**

Surviving to Thriving (the Programme) was developed as a partnership between MGS, NNLHF, BEFS and greenspace scotland. The Programme aimed to support specific objectives outlined by partners, namely:

NLHF

Desired outcomes for leaders were:

* Improved confidence and resourcefulness
* Expanded networks of personal and professional support
* Enhanced business skills including capacity to make improvements and changes in their organisation across governance, financial management and business planning, fundraising, and, where relevant, enterprises development and social investment
* Increased knowledge and skills in setting goals for heritage and social impacts which are clear, communicable and measurable to help demonstrate the value of their activities.

Desired outcomes for organisations were:

* Strengthened and more diverse governance
* Increased financial resilience
* More diverse sources of income and increased income
* Greater reach into their community/communities with expanded and more diverse supporter, audience and/or volunteer base.

MGS/BEFS/greenspace

Desired outcomes were:

* Organisations better understand how to engage with local communities and use their programming to be more inclusive, sustainable and involve more people with their work
* Participants have increased their skills in the areas they need to operate a thriving heritage business
* Participants have greater well-being through the establishment of peer-support networks and professional cohorts.
* Participating organisations will be equipped with confident, skilled, and empowered staff who are motivated to embrace new opportunities to deliver their work.

**2.2 Planned Programme delivery and recruitment**

**2.2.1 Informing the content**

The Programme, which was to be bespoke, was to commence in April 2021 and run for 18 months, with the expectation that participating organisations participate in between 20-30 days training within that time period using a variety of training methods such as small cohorts, directly at organisation’s locations (where possible) and digitally.

The Programme content was to be informed by the issues raised in the national strategies, the Skills Investment Plan and the partner desired outcomes. To ensure that the Programme also met participant needs, two focus groups were conducted with representatives from a cross-section of organisations in the sector. Participants explored issues within the sector which included:

* Constraints in communications and marketing arising from lack of time, lack of knowledge and lack of people with dedicated communication/marketing roles
* Reliance on social media for marketing activity and a need for digital marketing skills, including how to use digital skills for income generation
* A need to develop marketing strategies for activities on a budget (funding for marketing was raised as a key constraint)
* A need for sustainability in financial planning, particularly longer-term security
* Skills gaps in budget setting, monitoring, business planning, risk identification and management and strategic fundraising

The focus groups also highlighted difficulties in engaging Trustees, understanding governance and getting the best of a team.

**2.2.2 Participant recruitment**

The Programme was advertised by Museum Galleries Scotland prior to its development. Organisations were to complete an application process which sought information on the reasons for their application, what they hoped the Programme would achieve and which two representatives they planned to attend the training. Eligible organisations were to be awarded a community grant to enable them to fully participate in the skills programme.

The Programme was aimed at those in leadership/Trustee roles and individuals who were likely to develop into those roles as part of the career progression. It was intended, at the design stage, that participants would, where possible, attend all topics within the Programme.

Forty-one (41) organisations were selected to take part in the Programme (although one organisation subsequently withdrew before the Programme started). These organisations represented a cross section of the sector. Participants varied by:

* Organisational size
* Organisational structure
* Composition of Board and management team
* Size of management team
* Extent of involvement of employees and volunteers
* Geographical location
* Sub sector within the heritage sector.

**2.3 Programme format and content**

**2.3.1 Format**

Following an open tender process, Blue Sky Experiences were selected to develop and run the Programme, with additional workshop topics developed and delivered by City of Glasgow College. Due to Covid, the Programme was developed to be delivered remotely using Zoom. This meant that participants could access the Programme from any location, without the need to travel.

Participants were divided into four cohorts, with the intention of them progressing through the Programme with their relevant cohort members. Breakout sessions were also included in the Programme for each topic and cohort group. Feedback from participants suggested that some individuals changed cohort groups either due to problems with availability or to enable them to share experiences with other more similar organisations.

In addition to the Programme sessions, participants could also complete and Institute of Leadership and Management (ILM) accredited qualification, which required additional home study in order to achieve.

**2.3.2 Content**

The Programme developed by Blue Sky was based on four topics, entitled:

* Leadership
* Governance
* Business Planning
* Communications and Community Engagement.

It commenced in April 2021 and completed in the summer of 2022. The Programme content was developed with the presumption that the same participants from each organisation would attend at least the Leadership, Governance and Business Planning topics. However, the majority of organisations did not send the same participants to each of the topics, with some participants only attend one or 2 topics in the Programme.

*Leadership*

The Leadership modules were delivered over the longest timeframe, between May and September 2021. The topic included and Insights Discovery Profile which aimed to help participants understand their leadership preferences and to better understand others in order to build more effective connections and relationships and develop effective adapting strategies to bring out the best in others.

*Governance*

Governance was developed to be delivered in three consecutive days and aimed to address what good governance looks like, how this can be delivered and how leadership skills could be used to enhance effective governance.

*Business planning*

The Business Planning topics was also delivered over three consecutive days and included risk identification, analysis and mitigation. The topic also included effective fundraising.

*Communication and Community Engagement*

The Communication and Community Engagement tops was delivered over three consecutive days and included use of digital media and marketing.

**Section 3: The evaluation**

**3.1 Planned approach**

MGS and its partners commissioned an evaluation of Surviving to Thriving to determine how the Programme was working and the extent to which it was delivering benefits to the participants, their organisations and to the wider sector. It was intended that this would be an impact evaluation and that it would determine:

* What benefits the training delivered (intended and unintended)
* The extent to which it delivered across all key stakeholders
* The extent to which delivered all the specified training outcomes and how this contributed to key sectoral strategies including the Skills Investment Plan, the State of Heritage Funding Now and Character Matters
* What about the programme made it work
* What, if anything, prevented delivery of the anticipated training outcomes
* How any barriers were overcome
* What lessons can be learned from the implementation of the training
* Any remaining issues which needed to be addressed to enhance effectiveness
* The return on investment from the Programme
* Key recommendations for the future direction of the Programme.

It was intended that the evaluation would incorporate:

* An evaluation framework which will outline all desired outputs and outcomes, the indicators
* Pre and post questionnaires of Programme participants to establish pre-training expectations and how they expect to apply the learning, knowledge gained from the training and plans for implementing the learning
* Follow up interviews with a sample of participants and other representatives from their organisations to explore how learning has been implemented, benefits gained and how these relate to the Programme’s desired learning outcomes
* Qualitative interviews with key stakeholders in the museum, heritage and culture sectors to explore Programme outcomes and its potential legacy in addressing the key issues facing their sector.

**3.2 Evaluation framework**

A review of key national strategic and policies, the funding application process and outcomes set by Programme partners, together with discussions with Programme Leads at MGS resulted in an agreed outcome framework which links desired outcomes to Programme objectives and agreed sources of evaluation evidence. The evaluation framework is outlined in Table 1 below.

**Table 1: Evaluation Framework**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Source** | **Outcome** | **Objective of development programme** | **Indicators** | **Evidence source** |
| FUNDING APPLICATION  | Wider range of people will be involved in heritage  | Better understand how to engage with local communities & partners to use their programming to be more inclusive, offer more sustainable access and involve more people  | Recognition of need to engage locally and with partners (changes in thinking) | Follow up discussions |
|  |  | Improved understanding of how to embed community relationships, impact measurement, and inclusion in strategic development so better able to make & sustain connections needed on a local and national level | Recognition of need to engage locally and with national partners (changes in thinking) | Follow up discussions |
|  |  | Develop, deliver, and evaluate programming that focuses on their social, as well as economic, potential working with local organisations to embed themselves in the development of their own places | Recognition of need to engage locally and potential contribution to wider social, economic performance (changes in thinking) | Follow up discussions |
| FUNDING APPLICATION | People will have developed skills  | Individual participants (and their organisations) will have increased their skills in the areas they need to operate thriving heritage businesses | Pre and post training skills level from training programme (and also linked to the organisations' desired benefits from training)  | Blue Sky pre & post questionnaires  |
| FUNDING APPLICATION | People will have developed skills  | Address skills gaps - strategic leadership; effective performance management; governance; business and forward planning; financial management; fundraising; impact measurement  | Pre and post training skills levels from training programme  | Blue Sky pre & post questionnaires |
|  |  | Workforce will be better able to manage change, embrace opportunity, and mitigate risk within their organisations. | Improved understanding of resilience Changes in thinking re resilience, risk, opportunity and recognition of need to attract local communities and cross sectoral relationships | Blue Sky pre & post questionnairesFollow up discussions |
| CHARACTER MATTERS |  | Develop attitudes, behaviours, skills and knowledge to deliver relevant museums | Recognition of contribution to issues wider than culture sector (links to national performance framework measures which are not purely cultural) | Blue Sky pre & post questionnaires |
| FUNDING APPLICATION | People will have greater well-being | Participants will have greater well-being through the establishment of peer-support networks and professional cohort | Improvements between pre and post training in validated wellbeing measures (WEBWMS) | Blue Sky pre & post questionnaires |
|  |  | Feel more confident through training and facilitation | Improvements between pre and post training measures of confidence and wellbeing measures | Blue Sky pre & post questionnaires |
| **Source** | **Outcome** | **Objective of development programme** | **Indicators** | **Evidence source** |
| FUNDING APPLICATION | People will have greater well-being | Individuals will be more aware of their potential and practices | Increased confidence in their abilities to bring about change, plan strategically, manage team | Blue Sky pre & post questionnaires |
|  |  | Build confidence & skills in areas needed to embrace change within their work | Improvements between pre and post training measures of confidence (linked to organisations' desired outcomes) | Blue Sky pre & post questionnaires |
|  |  | Support leaders to recognise their role and continue to engage with & inspire their communities | Changes in attitude to roleExtent of engagement with local communities in programme planning | Blue Sky pre & post questionnaires |
|  | The funded organisation will be more resilient  | Heritage businesses will be equipped with confident, skilled, empowered staff who are motivated to embrace new opportunities to deliver work | Attitudes to risk and new ideas generation (pre and post training) | Blue Sky pre & post questionnaires |
|  |  | Better able to plan strategically, manage effectively, and work sustainably | Improvements in confidence in ability to plan and manage teams | Blue Sky pre & post questionnaires |
|  |  | More confident, self-aware leaders | Improvements between pre and post training measures of confidence and wellbeing measures | Blue Sky pre & post questionnaires |
|  |  | Stronger governance (more diverse governance) | Trustees and management with broader skill sets, more closely aligned with organisations values (inc diversity, resilience, need for community partnerships etc | Blue Sky pre & post questionnaires |
|  |  | Better strategic planning (including financial and fundraising planning); | Improvements in confidence in strategic and financial planning  | Blue Sky pre & post questionnaires |
|  |  | Increased workforce skills (especially in engagement, digital maturity, and impact) | Pre and post training skills levels from training programme | Blue Sky pre & post questionnaires |

**3.3 Challenges and mitigations**

Participant engagement in the evaluation was more variable than expected, despite MGS indicating at the application stage, and at the Programme launch, that participants would be expected to provide feedback on their experiences of the Programme and how they were using the learning from it. However, permission to provide the evaluators with participant contact details had not been obtained at this stage.

To ensure compliance with GDPR, consent to participate in the evaluation and a request for provision of contact details for those who wished to take part was included in the pre and post questionnaires. This ensured that the evaluators had consent to re-contact individuals.

The questionnaires resulted in a total of 47 out of 80 individuals providing consent for a follow up discussion (59% of the sample).

It was intended that the evaluation would focus on impact of the Programme. However, feedback from participants in the post Programme questionnaires indicated that there had been limited application of the learning due to work-based time pressures amongst participants, many of whom were from small organisations with very small management teams. As a result, it was decided to adopt a process approach to the evaluation, which would consider how the learning has been delivered, what skills and knowledge improvements have resulted and how organisations plan to apply the learning. The evaluation has been extended to enable further follow up with participants to explore impact at a later date.

**Section 4: Quantitative Results**

All participants in Programme were invited to participate in an online survey prior to their participation in each topic in the training and another survey after completion of the training topic. The purpose of the surveys was to establish pre and post training skills and knowledge to enable assessment of progress made following the training.

**4.1 Participant profile**

**4.1.1 Participant role**

The survey responses indicated differing attendance amongst topics in the Programme, Senior Managers and Trustees tended to comprise the majority of participants, however the involvement of Trustees/Board Members appeared to reduce after Leadership and Governance. (See Fig 1).

**Fig 1: Participants’ role**

|  |  |
| --- | --- |
| **Leadership**  | **Governance**  |
| **Business Planning** | **Communications & Community Engagement** |

As can be seen from Figure 1, the profile of attendance at the Communications & Community Engagement topic was different from the other modules, with fewer Board/Trustees and Senior Managers. There were also significantly fewer Team Managers and staff on this strand, compared to the Leadership module.

**4.1.2 Length of time in role**

Experience in their current role was mixed amongst the Programme participants, with those attending the Leadership module having the longest time in their role.

Just under half (33 people) had more than 6 years in a leadership role, with a further 21 people having between 3 and 5 years’ experience, 13 people having less than 2 years’ experience and 3 were not in a leadership role.

Participants in the Governance training had less time in their current role, compared to those that attended the Leadership training. Over two thirds of respondents (68%) in the Governance module had three years or less in the role.

Although participants attending the Business Planning module had less time in their current role compared to those that attended the Leadership training, only 50% of the respondents in the Business Planning module had more than three years in the role.

Whilst just under half of respondents (48%) for Communications & Community Engagement had three years or less in the role, which is a lower proportion than the Governance and the Business Planning training, the proportion with over 5 years in post (30%) is lower that the Leadership training where almost a half of participants had more than 5 years in post.

**4.1.3 Emotional health and wellbeing**

Participants were asked to rate themselves in terms of their current emotional health and wellbeing

Leadership participants

Whilst the majority of respondents rated themselves positively across all four aspects of optimism, dealing with problems, clarity of thinking and confidence, Fig 2 below illustrates a greater lack of confidence as well as issues around optimism and clarity of thinking.

Governance participants

Whilst the majority of respondents rated themselves positively across all four aspects of optimism, dealing with problems and clarity of thinking, there was a greater lack of confidence amongst the respondents. This is similar to the respondents in the Leadership training

Overall, the responses are similar to those provided prior to the Leadership training, although respondents attending the Governance training were more positive about their clarity of thinking.

Emotional health and wellbeing

Participants have been asked to rate themselves in terms of their current emotional health and wellbeing. To prevent people who have attended multiple training sessions, this question was only asked of participants who had not attended the Leadership or Governance training. There were 12 responses from a combination of Board/Trustees, Senior Managers, Team Managers and Staff.

Business planning

To prevent people who have attended multiple training sessions, this question was only asked of participants who had not attended the Leadership or Governance training. There were 12 responses from a combination of Board/Trustees, Senior Managers, Team Managers and Staff.

These respondents rated themselves positvely across all measures, including confidence, unlike Leadership and Governance participants.

Communications & Community Engagement

To prevent people who have attended multiple training sessions, this question was only asked of participants who had not attended the Leadership or Governance training. There were 13 responses from a combination of Board/Trustees, Team Managers and Staff.

These respondents were less positive than those who attended the Leadership, Governance or Business Planning session. None of the statements were rated by respondents as All of the Time or Often, with lowest ratings for Thinking Clearly and Feeling Confident.

**4.2 Baseline and post training evaluation - Leadership**

Eighty (80) individuals were invited to participate in the surveys. There were 70 responses to the pre-training questionnaire (baseline) 88% of all participants.

**4.2.1 Pre-training**

*Reasons for participation*

The key reasons for participating were to improve understanding/increase knowledge (18 participants), improve skills (18 participants) and increase confidence (12 participants). Developing strategy and a clarity of direction were also highlighted by 8 participants. See Fig 6 below.

Other factors such as the opportunity to participate in formal training, improve networks/connections and improve working with other groups such as volunteers, community and customers were also highlighted to a lesser extent (4 participants respectively).

*Current approach to local engagement*

A key outcome of the development programme is to encourage participants to maximise their engagement with their local communities. Feedback from the respondent suggests that they believe they are already engaging with their local communities in terms of liaising with local organisations, local customers and local suppliers (see Figs 7 and 8). Also, almost all of the respondents thought that they were considering current issues in their programming (66 people).

Fig 7 also suggests that respondents felt that they were already engaging with organisations from within and outwith their sector, although engagement with organisations outwith their sector was lower (40 respondents compared to 50 for organisations within their sector). The extent to which their customer base reflected the local community also varied, with 30 respondents suggesting that they majority of their customers were not from the local area (see Fig 8 below).

*Objective for attending the Leadership module*

Respondents’ perceived lack of confidence is mirrored in their personal objectives for attending the Leadership strand. As Fig 9 illustrates, 20 respondents are seeking to increase their confidence , with developing skills (23 respondents) and better managing their team (14 respondents) also featuring as key objectives.

*Rating their skills*

Participants were also asked to rate themselves on professional skills and leadership & management skills and were asked how they thought their team would rate them. As Fig 10 indicates, respondents rated themselves strongly on professional skills but less strongly on leadership and management skills (56 respondents rating themselves as fully skilled or having good professional skills compared to 26 respondents for leadership and management).

Interestingly, respondents thought that their team would rate them more highly on their leadership and management skills, with 53 respondents suggesting that their team would rate them as fully skilled or having good skills). Team members will be asked to rate their managers who participated in the Programme as part of this evaluation to enable a direct comparison to be made between the two scores.

Fewer respondents rated themselves as fully skilled or having good skills in managing change initiatives (25 respondents). There were also fewer respondents who thought that their team would rate them as fully skilled or having good skills (37 respondents).

*Approach to performance management*

Participants were asked if they worked to an established vision and values in their organisation and within their team. Almost two thirds of the respondents (46 people) stated that they did either all of the time or often. A further 13 stated they did some of the time with 11 people suggesting that they rarely or never did.

Over half of the respondents (41 people) also indicated that they used a performance management procedure (see Fig 13 below). However, 29 individuals suggested that they had no procedure, were unaware of it or had nothing formal in place. These individuals represented a mix of Trustees/Board Members, Senior Managers, Team Managers and Staff.

Whilst over half of the respondents use a performance management procedure, only 50% of those individuals (22 people) thought that they had good skills in performance managing their team.

The individuals who suggested that they had limited or very limited experience tended to be Senior Managers, whereas those who thought that they had good skills tended to be Trustees/Board Members.

**4.2.2 Post-training**

Thirty-eight (38) participants completed the post training questionnaire. This is 48% of the total numbers who participated in the Leadership sessions. The respondents were primarily Senior Managers (37%), Trustee/Board Members (24%), Team Mangers (16%) and Staff (16%). One volunteer responded to the post training survey and two respondents did not confirm their role.

The majority of respondents (63%) attended cohorts 3 and 4 from the Programme. Only 5 respondents were from Cohort 1 and 9 from Cohort 2.

Almost two thirds of respondents (63%) had attended leadership training prior to this programme. These tended to be Senior Managers and Trustee/Board Members.

Prior to this Leadership training, respondents indicated that they hoped that it would:

* Increase confidence in undertaking the leadership role (8 respondents)
* Provide a greater understanding of the leadership role (6 respondents)
* Provides ideas/insights into good practice (4 respondents)
* Improve how volunteers were managed (3 respondents)
* Increase insight into individuals’ personal leadership style (3 respondents)
* Improve management of team (3 respondents).

A high percentage of the respondents (82%) indicated that the training had completely or mostly met their needs. Respondents found the approach insightful into their own leadership styles as well as the preferred communication styles of others, however the suitability of the content for the charity sector and smaller organisations was questioned by a number of respondents, who found it “too corporate” and “more appropriate for larger organisations”. These tended to be Senior Managers.

Following the Leadership training, 30 respondents (79%) rated themselves as being fully skills or having good skills (compared to 28 individuals, 40% of respondents, pre-training). Whilst this is a high response, it has to be noted that the response rate to the post-training survey is lower than the pretraining (38 people compared to 70).

Respondents suggested that the training had improved their skills and knowledge, made them more confident or reinforced existing leadership knowledge.

Almost all of the respondents (34 out of 37) were planning to apply their learning in the future, including using their learning to amend their communication styles to better meet the needs of their teams and taking different approaches to conducting performance reviews or appraisals. Respondents also suggested that they were planning to increase engagement, consultation and decision making in their organisations. A small number were also planning to review their organisation vision and mission.

**4.3 Baseline evaluation - Governance**

Due to a very small number of responses to the post training questionnaire, this report only features the baseline survey for Governance.

48 individuals were invited to participate in the survey and a total of 43 responses were received (90% of all Governance training participants).

**4.3.1 Board profile**

*Size*

88% of respondents were from organisations with a Board in excess of 6 people. The most common size of Board comprised of between 6 and 10 people (65% of respondents). Only 5 respondents (12%) were from organisations with less than 5 people in their Board.

Diversity

A large majority of respondents indicated that their Board comprised people from different genders (88%) and with different ages (86%). However, in terms of Board membership from black and ethnic communities and from people living with disability, the responses indicate a significant lack of diversity. Only 6 respondents stated that their Board had people from black and ethnic communities (6%), with 18 having people living with disabilities (42%).

*Governance responsibilities and skills*

Just over three-quarters of respondents (77%) had governance responsibilities in their current role. 44% of respondents had governance responsibilities in a previous role. All but three of these respondents had governance in a previous role.

Seven respondents never had governance responsibilities in a current or previous role. Two were Trustees/Board Members and the remaining respondents were a mix of Volunteers, Staff, Team Manager and Senior Manager.

For those respondents who indicated that they had governance responsibilities the most common were:

* Overseeing the operation of their charity in line with its charitable objectives/reporting to OSCR (12 respondents)
* Financial management/Treasurer (11 respondents)
* Making or monitoring policies (7 respondents).

*Current skills - Governance*

Participants were also asked to rate themselves on their governance skills and were asked how they thought their team would rate them. As Fig 18 indicates, just under half of the respondents (44%) thought that they had good skills (no-one thought they were fully skilled). These respondents tended to be Trustees/Board Members and all had governance in a previous or current role.

13 respondents felt that they had limited or very limited governance skills, 9 of these respondents were Trustees/Board members, 3 were Senior Managers and 1 Team Manager.

5 respondents (12%) stated that they had no experience of governance (one of whom was a Trustee/Board Member). Respondents tended to rate their skills as adequate or limited due to a lack of formal training or a recognition that the role had changed over time.

The respondents thought that their team would rate them more highly on their governance skills (similarly to the leadership and management skills ratings). Almost double the number of respondents thought that their team would rate them as having good skills or be fully skilled. These respondents were primarily Trustee/Board Members or Senior Managers with current or previous governance experience.

*Previous training*

Almost two thirds of respondents (60%) had no previous governance training. Half of these respondents (13 out of 26) were Trustee/Board Members and a further 9 were Senior Managers and 20 out of the 26 respondents had current governance roles.

For those who had received previous training, this tended to cover the role and responsibilities of a Trustee or was general Board training. Two respondents had attended governance training related to a previous occupational sector and one respondent had attended a GCVs course.

*Existing policies*

Just over two thirds of respondents (67%) stated that their organisation has policies. Only one respondent stated that there were no policies, however 5 respondents were uncertain if policies existed (all but one of whom were Trustee/Board Members).

Where policies existed, the most common were:

* Safeguarding/vulnerable groups (7 respondents)
* Personnel (not specified) – 6 respondents
* Environmental – 5 respondents
* Management of collections/assets (5 respondents)
* Equality and diversity – 4 respondents
* Risk – 4 respondents
* Health & Safety – 4 respondents.

*Fundraising responsibilities and skills*

Just over three -quarters of the respondents (77%) had existing responsibilities for fund raising. This comprises 13 Trustees/Board members, 14 Senior Managers, 3 Volunteers, 2 Staff and 1 Team Manager.

The most common responsibilities were for identifying opportunities (10 people) or inputting into grant applications (8 people). Other less common responsibilities were included developing strategy (3 respondents) and managing grants/budgets (3 people). A further 3 people stated that they were responsible for everything connected with fundraising.

15 out of the 33 respondents with fundraising responsibilities did not have this role previously. Eleven of these individuals were Trustee/Board Members or Senior Managers.

With the exception of one person (a Volunteer), those respondents who did not have responsibility for fundraising currently were Trustee/Board Members or Senior Managers.

Only one in 4 respondents (26%) stated that they had received training previously on fundraising. These tended to be Senior Managers, with the training covering writing applications or how to approach funders.

The feedback suggests that the Trustee/Board Members with responsibilities for fundraising tended not to have had any training on it.

**4.4 Baseline and post training evaluation - Business Planning**

Forty-seven (47) individuals were invited to participate in the surveys. There were 42 responses to the pre-training questionnaire (baseline) and 39 responses to the post training questionnaire. (90% and 83% of all Business Planning training participants).

**4.4.1 Pre-training**

*Current responsibilities and pre-training skills*

90% of respondents (38 people) had business planning as part of their current responsibilities and just over half (52%) had it has part of their previous role. This is a higher percentage of respondents than for Leadership or Governance

Four respondents had never had business planning responsibilities either in their current or previous role. Two were Team Mangers and two were Staff.

For those respondents who indicated that they had business planning responsibilities, the most common were:

* Total responsibility for development and implementation (10 respondents)
* Forward planning (5 respondents)
* Finance management (5 respondents)
* Creation of the plan (5 respondents).

Participants were also asked to rate themselves on their business planning skills prior to attending the training and were asked how they thought their team would rate them. As Fig22 indicates, only 14% of the respondents (6 people) thought that they had good skills (no-one thought they were fully skilled). This is less than half of the proportion of respondents who rated themselves good for Leadership or Governance skills.

15 respondents felt that they had limited or very limited business planning skills, 2 of these respondents were Trustees/Board members, 7 were Senior Managers, 3 were Team Manager and 3 were Staff.

3 respondents (%) stated that they had no experience of business planning (one of whom was a Trustee/Board Member). Respondents tended to rate their skills as adequate or limited due to a lack of formal training or a considerable time lapse since their training.

As with respondents from Leadership and Governance, the respondents thought that their team would rate them more highly on their business planning skills. More than double the number of respondents thought that their team would rate them as having good skills. These respondents were primarily Trustee/Board Members or Senior Managers with business planning in their current role.

Almost two thirds of respondents (62%) had no previous business planning training (Fig 22). This is a similar proportion as respondents in Governance. Five of these respondents were Board Trustee Members and 16 were Senior Managers. All of whom had current business planning responsibilities.

For those who had received previous training, 4 respondents had higher or further education qualifications which included business planning. Other had received training which included cashflow/budgeting, finance management or project management.

*Strategy development*

Participants were also asked to rate themselves on strategy development skills prior to the training.

79% of respondents (33 people) have had strategy development as part of their current responsibilities, predominantly Board/Trustee Members and Senior Managers. Two Staff and one Volunteer also had this in their current role.

17 respondents had it has part of their previous role. Again, these tended to be Board/Trustee Members or Senior Managers.

Twenty-five (25) respondents never had strategy development in their current or previous role. These tended to be Board/Trustee Members or Senior Managers.

For those respondents who indicated that they had strategy development responsibilities, their role was mixed including action planning, creating projects and project management.

Almost three quarters of respondents (74%) had no previous strategy development training (Fig 25). This is a higher proportion of respondents compared to Leadership and Governance.

For those who had received previous training, 2 respondents had higher or further education qualifications which included strategy development. Others had received training which included goal setting, use of PESTLE, marketing strategy and input to discussions.

*Risk management responsibilities and training*

Just over three-quarters of respondents (76%) had risk management in their current role. With the exception of one individual who was a Staff member, these respondents were Trustees/Board Members or Senior Managers. Their roles tended to be identifying or reviewing risks and creating or maintaining a risk register.

38% of respondents (16 people) had risk management in a previous role. Again, these respondents were Trustees/Board Members or Senior Managers.

Twenty-five (25) respondents have never had risk management either in their current or previous role. These tended to be Board/Trustee Members or Senior Managers but did include Staff and a Volunteer.

**4.3.2 Post-training**

*Business planning*

41% of respondents confirmed that they had received previous training in business planning. This is compared to 38% in the baseline survey.

Prior to the training, respondents indicated that they hoped that it would:

* Improve understanding of business planning and what it involves (8 respondents)
* Provide advice, guidance or techniques to improve business performance (7 respondents)
* Improve skills (6 respondents)
* Refresh existing skills (4 respondents)
* Enable people to write an effective business plan (4 respondents)
* Provide an overview of business planning principles (3 respondents).

Almost all of the respondents (95%) indicated that the training had completely or mostly met their needs (see Fig 10). Respondents commended the content and delivery of the course, which had contained useful examples and templates. There were some respondents who suggested that there was a lot to take in and they would need some time to digest the information. These tended to be Senior Managers.

*Strategy development*

Fewer respondents had attended strategy development training than business planning training. 11 respondents (28%) had received strategy development training previously. These tended to be senior managers. This compares to 41% for business planning.

Prior to the training, respondents hoped that it would:

* Increase their understanding (5 respondents)
* Refresh or update their skills (5 respondents)
* Provide ideas and tools (6 respondents).

Once again, almost all of the respondents (95%) indicated that the training had completely or mostly met their needs (see Fig 29). Again, the content and delivery were highlighted, together with improvements in knowledge and the provision of toolkits and advice.

Again, there were some respondents who needed more time to consider the information and two respondents felt that the information was “too corporate” for small organisations.

*Risk management*

15 respondents (38%) had attended risk management training previously. These tended to be Trustee/Board members and Senior Managers.

The most common reasons for attending the training were to refresh/update existing skills or improve understanding.

All the respondents indicated that the training had met their expectations, either completely or mostly. This is the highest rating of any of the topics so far.

Once again, the content and delivery of the training was highlighted, as well as the provision of examples and templates.

75% of respondents now rated their business planning skills as fully skilled or having good skills. This compares to only 14% rating themselves as having good skills prior to the training. Whilst there is some difference in the profile of respondents to the pre and post training surveys, the difference is not sufficient to explain the considerable uplift in perceived skills.

Respondents suggested that the training had improved their understanding, provided more clarity on how to assess risk and increased their confidence in assessing and managing risk.

Those who suggested that they had adequate or limited skills tended to be senior managers, team managers or staff. Feedback suggested improvement in knowledge but some issues with confidence remain.

Almost all of the respondents (37 out of 39) were planning to apply their learning in the future and a high proportion have already applied some learning (74% of respondents). This has included:

* Using PESTLE and risk management tools
* Forming a volunteer fundraising group
* Conducting workshops with committee members.

Lack of time appears to be the main constraint in applying the learning.

**4.5 Baseline and post training evaluation – Communications and Community Engagement**

45 individuals were invited to participate in the survey. There were 33 responses to the pre-training questionnaire (baseline) and 31 responses to the post training questionnaire. (73% - 69% of all Business Planning training participants).

**4.5.1 Pre-training**

*Current responsibilities and skills*

Marketing planning and training

70% of respondents (23 people) have marketing planning as part of their current responsibilities, with a third (33%) had it has part of their previous role. This is a lower percentage of respondents than for Leadership, Governance or Business Planning.

It is noted that there were some respondents who fed back through the survey that they were not expecting Marketing Planning to be included in the Communications and Community Engagement topic.

Nine respondents have never had marketing planning responsibilities either in their current or previous role. Three of these respondents were Trustee/Board Members or Senior Managers. The remaining respondents were Team Managers, Staff and a Volunteer.

For those respondents who indicated that they had marketing planning responsibilities, the most common was total responsibility for development and implementation (10 respondents). Other respondents had responsibilities for:

* Strategy development (3 respondents)
* Advertising (2 respondents)
* Approval of the plan (2 respondents).

The majority of respondents had never had any previous training on marketing planning (70%). Almost all of those who had training (8 out of 10 respondents) were Trustee/Board Members, with the training tending to be part of a graduate or post graduate training programme.

*Communication and training*

It would appear, from the data, that Communication features more prominently amongst respondents current and previous roles than Marketing Planning. Almost all respondents (94%) had communication in their current role and almost two -third (64%) had it in a previous role.

Responsibilities included:

* Social media (9 respondents)
* Development and implementation of communications and the strategy (5 respondents)
* Dialogue with the community (5 respondents)
* Developing communication materials (5 respondents).

Only two respondents had never had Communication in either their current or previous role.

Despite almost all respondents having communications in their role, only just over a third (36%) had received any training in it. These were a mix of Trustee/Board Members, Senior Managers and Staff. The training included higher education degrees (4 respondents) and specific topic training such as social media or digital.

Participants were also asked to rate themselves on their communication skills and were asked how they thought their team would rate them. As Fig 34 indicates, only just over a third (36%) of the respondents thought that they were fully skilled or had good skills. Almost half of the respondents (48%) thought that their skills were adequate.

Those who rated themselves more highly did so as they felt they had lots of experience. Those who considered their skills to be adequate did so due to lack of experience or confidence.

15% of respondents thought that their skills were limited or very limited. Unlike the other topics, no-one thought that their skills were very limited or that they had no experience.

As with respondents from Leadership, Governance and Business Planning, the respondents thought that their team would rate them more highly on their communication skills. Over half of the respondents (57%) thought that their team would rate them as being fully skilled or having good skills. These respondents were primarily Trustee/Board Members, Senior Managers or Staff with communication in their current role.

*Commercial development and training*

Less than half of the respondents (45%) had commercial development responsibilities in their current role and only 1 in 5 (21%) had it in their previous role (see Fig 35). Those who had responsibilities were Trustee/Board Members or Senior Managers, with a variety of roles, ranging from developing an in-house shop to strategy development and delivery.

16 people (almost half of the respondents) have never had Commercial Development either in their current or previous role. These tended to be Staff, with a small number of Board/Trustee Members, Senior Managers and a Volunteer.

Only 5 respondents (15%) had previous training in commercial development. Four were Trustee/Board Members and 1 was a Senior Manager.

**4.5.2 Post training**

Respondents were asked what community engagement means to their organisation. 42% of respondents defined it in terms of their local communities, 18% defined it more widely to include national, geographic and international communities. One respondent highlighted sectoral communities addition to this. The most common other definition related to reaching out and communicating with communities (unspecified).

*Marketing planning*

Less than a third of respondents (29%) confirmed that they had received previous training in marketing planning. This is virtually identical to the baseline survey (30%).

Prior to the training, respondents indicated that they hoped it would give them tools and techniques, update their skills and knowledge and build confidence. Three respondents commented that they did not expect marketing planning to be covered in the topic.

The majority of the respondents (87%) indicated that the training had completely or mostly met their needs (see Fig 10). These respondents commented on the broad coverage of the content, the opportunities for discussion which they found useful and the tools and examples.

*Communications*

Only four respondents stated that they had received training previously on communications

Prior to the Communications and Community Engagement training, respondents hoped that it would provide them with tools and techniques, update their skills and knowledge and generate some ideas and examples of good practice to use in their organisations.

A large majority (86%) of the respondents indicated that the training had completely or mostly met their needs (see Fig 39). The examples provided in the training together with the opportunities for discussion and perceived improvements in understanding and knowledge were cited as main benefits from the sessions.

For those who felt that the training only met their needs a little, they highlighted the broad nature of the topics included in the training and a lack of examples relevant to their organisations. These respondents were mostly Staff, indeed four out of the 9 staff participating in the training felt that it only met their needs a little.

*Commercial development*

Five respondents (19%) had attended commercial development training previously (three Senior Managers, 2 Trustee/Board Members and a Team Manager).

The most common reasons for attending the training were to obtain ideas on how to maximise income generation or growth, refresh/update existing skills or improve skills and knowledge on commercial development.

Just under three-quarters of respondents (74%) stated that the training had met their expectations, either completely or mostly. These individuals tended to be Trustee/Board Members or Senior Managers and commended the content for generating discussion and ideas.

Respondents who suggested the training had only met their needs a little highlighted lack of relevance of examples to their own organisation. These individuals tended to be Staff.

Just over half of respondents (58%) now rated themselves as fully skilled or having good skills. This compares to 36% rating themselves as having good skills prior to the training. These respondents were a mix of Trustee/Board Members, Senior Managers, Team Managers and Staff. Those who rated their skills now as adequate were Trustee/Board Members and Staff.

Increases in confidence, understanding and knowledge were the key reasons respondents suggested that the training had improved their skills.

Those who suggested that they had adequate or limited skills tended to be senior managers, team managers or staff. Feedback suggested improvement in knowledge but some issues with confidence remain.

All of the respondents are planning to apply their learning in the future and 9 respondents have already applied some learning, including re-vamping a strategy and passing on ideas to others in their organisation.

**Section 5: Follow on discussions**

Forty-seven (47) participants indicated in the online surveys that they would be willing to be contacted for a discussion regarding their experiences in the Programme. Given that the online surveys had indicated that the majority of participants had not been able to make significant progress in implementing learning from the Programme due to work commitments, it was decided that the follow up discussions would focus on progress to date and future plans with a view to a further follow up being conducted during 2023 – a year after the training had been completed.

Invitations were issued to all 47 participants and 12 interviews were conducted with participants who agreed to a date and time for a Teams discussion. The interviews focused on:

* Pre training information
* Reasons for applying to participate
* Choice of participants
* Topics attended
* Reaction to the format of the training
* Leadership
* Governance
* Business Planning
* Communications and Community Engagement.

**5.1 Pre-training information**

The interviewees indicated that they had become aware of the training through either a newsletter or an email from MGS or from one of their partners advertising the training. According to the interviewees, both sources contained background information on the purpose of the training – suggesting it was related to helping organisations with their business planning, financial planning and fundraising strategies.

At that stage the training was not developed so there was no direct information to potential participants on training content or format, although a brief outline of the topics to be covered was included so all interviewees knew it covered Leadership, Governance, Business Planning, Communications and Community Engagement. Whilst information on the training programme was provided by MGS, information on the extent of the commitment required for the programme does not appear to have filtered down to some participants. Feedback suggests that half of the interviewees were unaware of the extent of the commitment to the training, as one explained:

*“We knew it was going to be delivered over a few months but we didn’t know that some of it was going to be on consecutive days – we are a very small management team and managing the time away was very difficult. It would have been better to know this up front”.*

**5.2 Reasons for applying to participate**

The interviewees had a range of reasons for wishing to participate in the training. The most common reasons were:

* Providing a refresh to previous leadership and management training
* A desire to improve existing approaches to strategy development – particularly business planning and fundraising
* An opportunity to increase the skills and knowledge amongst new Trustees and/or new members of management teams
* An opportunity to provide subsidised training for staff and/or volunteers which would otherwise have been unaffordable (this was especially important to smaller organisations).

**5.3 Choice of participants**

Applicants were asked to nominate members of their team who would be attending the training. Interviewees tended to nominate Trustees and Senior Management as they felt these individuals had existing responsibilities for the topics covered in the Programme. Where staff members were nominated, this tended to be in organisations where Trustees and Senior Managers were not involved in particular roles – this primarily related to Communication and Community Engagement.

For the most part, the organisations interviewed had intended for the same individuals to attend at least three of the topics (Leadership, Governance and Business Planning). However, the delay between the application stage and the commencement of the training resulted in difficulties in achieving this due to:

* Trustees and Senior Managers not being available on the training dates
* Workforce turnover resulting in some individuals having left organisations.

There were a couple of instances where dissatisfaction with one of the topics resulted in individuals withdrawing from the training (this is discussed in more detail in sub-section 5.5).

**5.4 Topics attended**

Not all of the interviewees participated in all of the topics. Participation was as follows:

* 11 participated in the Leadership topic
* 10 participated in Governance
* 11 participated in Business Planning
* 10 participated in Communications and Community Engagement.

For the most part, information from the training was cascaded by participants to other members of the Board or Senior Management Teams by those who attended the topics. This ensured that all Trustees and Senior Managers were aware of the information provided.

However, a small number of interviewees had issues with the Leadership topic and as a result of this did not cascade the learning from this module. Further information on their reaction to the Leadership content is outlines in sub-section 5.5.

**5.5 Reaction to the format the training**

**5.5.1 Online**

Due to the Covid 19 restrictions on people gathering at the time of the Programme, the decision was taken to conducted the training sessions online, via Zoom. There were some concerns at the time as to how this format would be received by participants, particularly as the quality and reliability of the delivery method would be dependent upon the quality and reliability of participants’ internet connections and the availability of reliable broadband connections, which are recognised as being variable in some geographical areas in Scotland.

However, feedback from the pre and post training questionnaires and the follow up discussions with a sample of participants, indicate that the online format was well received by the majority of participants. In the follow up discussions, participants suggested that it:

* Allowed them to maximise their time by reducing time lost due to travelling to venues. This was especially important for the smaller organisations where there were few/or no people who could provide cover whilst participants were attending the training.
* Reduced the cost of participating in the training, which together with the provision of the grant funding for participating organisations, was a key consideration for some organisations in applying for the training. The ability to access the training online meant no travel costs and, where the training was delivered on consecutive days, for the need for overnight accommodation

However, there were aspects of the online format which were highlighted as needing further consideration. These were:

* The length of the online sessions. Participants in the follow up discussions indicated that, whilst most of them enjoyed the format, they found it very intense sitting in front of a computer screen for, in some cases, up to four hours at a time. They suggested that more screen breaks need to be introduced into the Programme running order, particularly for the topics which were consecutive and/or full days

**5.5.2 Introductions**

Interviewees suggested that more time was needed for introductions at the start of the Programme. The online format meant that participants were meeting each other for the first time and had no understanding of who else was on the Programme or what their organisation did until they split up for the breakout sessions. Interviewees felt that it would have been better if more time had been spent at the start to get to know each other. As one individual commented: *“You usually have an ice breaker at the start of a training programme to allow people to settle – there was nothing like that on this”*

Another individual commented: *“coffee breaks and lunch times at training are often when you get to chat to others. I know this wasn’t possible with the online format but I felt that was a key benefit of a physical training which was missing “*

Some interviewees also suggested that a more structured introduction would have enabled the trainers to have a more awareness of the organisations participating and enabled more tailoring of examples in the sessions.

*“I felt that some of the examples in the sessions were not always appropriate and that, sometime, the facilitator was altering the content as we went along, which does show flexibility but some of the that could have been avoided if they had known more about us at the start”*

**5.5.3 Use of break out sessions**

Participants enjoyed the opportunity to have break out sessions. They enabled them to still “meet up” with co-participants and have discussions with them during the breakout sessions. The opportunity to meet participants from other organisations, other locations and other sub-sectors was cited by all interviewees as one of the key benefits of the Programme. Participants appreciated that this aspect was not lost during the online discussions.

Interviewees suggested that the format of the break out sessions should allow more time for networking as well as discussion on issues raised in the sessions. As one interviewee commented: *“I really enjoyed the opportunity to meet with others, I think everyone did but we found that we started chatting and then found that we ran out of time to talk about the things we were supposed to be talking about”*

**5.6 Leadership**

The first topic on the Programme was leadership. This was a key issue raised by participants in attracting them to the Programme, either as a means of providing training for individuals who had never attended formal management training (Trustees or Senior Management) or as a refresher to previous training.

The Leadership topic was built on Insights and Discovery Colour Analysis of Leadership types which is developed increase self-awareness, improve communication, enable leaders to better motivate their teams and raise awareness and understanding of everyone’s value to the team.

Only one of the interviewees were familiar with this approach prior to the training. The majority of them thoroughly enjoyed the experience, as these comments indicate:

*“I can see know how I and others in our team react to things – rather than get frustrated it has made me think about how I approach things and if I have the right people doing the right the right things”*

*“It was really interesting to see how people need different approaches – as a manager and leader you can often get taken up with the need for speed and don’t spend enough time making sure others are fully on board. I found it really helpful”.*

Several of the participants interviewed have taken the Insights approach into their organisations and shared the information with other Trustees and Senior Managers who had not attended the Programme. This has resulted in some cases in a shift in roles and responsibilities, especially for planning and developing strategy amongst team members and for a different approach to communicating across the teams.

*“We sat down after the Programme to understand everyone’s colours. We now know who to go to for ideas, who to go to for decisions and who to got to for getting things done”*

*“I met with our management team afterwards as not all of them could go on the training. We now understand that people have different ways of communicating, need different amounts of information to help them be effective”*

*“We think more about involving people now – rather than just telling them what we have decided”*

*“I think we can see more clearly how our people can contribute to things – and not always the way we would but that doesn’t make it wrong”*

Whilst the majority of interviewees found the Leadership module to be beneficial and have applied some of the learning in their organisations, with Boards, senior management teams, staff and volunteers, some interviewees did not find the module a positive experience.

There was more than one interviewee who raised the following concerns:

* A lack of introduction and context to the Insights assessment. Some interviewees suggested that they questionnaire needed more explanation as to its purpose and how it fitted into the learning outcomes for the Leadership module. They felt it was too quickly introduced at a time when people were still trying to settle into the online format of the training
* A lack of flexibility in the delivery style which did not take account of differences in individual’s preferred communication and learning styles
* Too heavy a reliance on written presentation which meant that the information was not delivered in an engaging and interactive way.

Difficulties with the style of the Leadership module resulted in some interviewees deciding not to attend the rest of the training and/or deciding not to recommend to other colleagues and not to use the information provided.

Discussions with the interviewees suggested that those who had most difficulties with the Leadership module tended to come from the same colour group in the Insights Analysis.

**5.7 Governance**

Whilst there was little unprompted discussion about the Governance module from the interviewees, after prompting the individuals suggested that it had been useful either in indicating that the policies and procedures they had were appropriate (2 interviewees) or that it has prompted them to revise existing policies to update them (4 individuals) or to create additional policies related to recruitment and retention (4 individuals).

Only one individual highlighted the need to review their Board structure and suggested that they were looking at ways of getting more volunteers involved in the Board. Discussions with individual suggested that this was more related to succession planning than issues with diversity.

**5.8 Business planning**

The Business Planning module was also well received by all eleven interviewees who attended it. Two aspects of the business planning module which appear to have resonated the most with interviewees were Risk Management and Fundraising. These were areas where the participants felt least confident prior to the training. Fundraising was recognised by all the interviewees as key to income generation but something which they viewed as a task and something which they found particularly difficult to complete, generally due to a lack of certainty as to what funds they should be targeting and how best to get their message across in a way which would appeal to funders.

Risk assessment was something which the interviewees generally suggested that they gave minimum attention to, focusing on how factors which resulted in them often not progressing actions where they considered the risk to be too high.

All of the interviewees suggested that they had applied the learning from this module in their organisations, having discussions with Boards and management teams to cascade the learning.

*“We realised we did all the elements to some degree but a lot them we didn’t do very well! We were very bad on the risk side of things. We did this last so we were not thinking about it early enough and we were also not considering the risk of not doing things. This has made us approach risk very differently”.*

*“We looked at risk but this tended to be in the context of if something has a high risk, we wouldn’t do it rather than think about how best to manage it”.*

*“We are tackling our fundraising strategy differently this year. This has helped us focus on key issues and be less vague”.*

*“We are now bringing in external help with our fundraising action plan – it’s really vital to us and after the training we feel some external support would help make it more effective. We didn’t really focus on an action plan before – it was more like firefighting and reacting”*

*“I feel more secure about the future because I think we have a more structured and focused approach to fundraising – not just reacting to adhoc opportunities”*

*“This has given me the confidence and skills to feel I can run a business now – I had no experience of this before. Also, we have realised I need more support – I was the only employee before, the training has helped Trustees see the importance of having more people”.*

**5.9 Communications and Community Engagement**

The feedback from the interviewees was mixed in relation to the Communications and Community Engagement module. Three interviewees who attended it indicated that they are reviewing their approach to marketing and one is increasing their use of social media as a result of the training.

*“This has helped us realise the importance of longer-term marketing planning. We have always had a plan, but it was very short term, covering a year-by-year approach”.*

*“We are now thinking about our community as wider than the immediate area we operate in. This will give us more opportunities to increase our footfall”*

*“We had a Facebook page but did very little with it and really didn’t use any other social media means. We have now got an intern in to help us with this and we have reached ut to an external provider to give use some more training on these areas. We would definitely not have even considered this before the training”.*

The remaining interviewees suggested that the impact of this module on their individual learning was minimal. They indicated that they were unaware that marketing was to be included in the content and that the title of the module had led them to believe it would be more about engaging with individual communities. This comments from this interviewee are reflective of their feedback:

*“Community engagement is completely separate to us from marketing – we have different people do each of these areas. Community engagement to us is about working with local community groups. The content was really about marketing – we definitely sent the wrong people on this”.*

A couple of interviewees also highlighted an assumption in the module content that organisations were already digitally savvy and the content was too advanced for them, although this was addressed by the facilitator and the content amended.

*“I think they assumed we were further along in our use of social media than many of us were. It might have been better to have asked about this beforehand”*

**5.10 Other benefits**

The feedback from the discussions suggests that the Programme had encouraged participants to be more structured in their approach to managing the organisation and that this has helped organisations to plan ahead more effectively. As this interviewee commented:

***“****It has encouraged us to write things down – to get things out of people’s head and on to paper. This is helping with our succession planning as we are now not relying on people remembering things to do and say at handover but actually take a more planned approach and think about what people need to know”*

**Section 6: Conclusions and recommendations**

**6.1 Conclusions**

Based on the feedback from the online questionnaires and the follow up interviews, the Programme has, overall been well received. With a small number of exceptions, the Leadership and Business Planning modules appear to have been the ones that have resonated most effectively with those individuals who participated in the evaluation.

Whilst issues with the diversity of boards were highlighted in the pre training questionnaire when reviewing board composition, they were not highlighted in the post training interviews. There was very little feedback on post Governance actions in the discussions and no feedback from participants from the post training questionnaire due to lack of numbers completing the post training survey (despite several requests).

The limited feedback on the Governance module prevents any conclusions from being drawn and the feedback from the Communications and Community Engagement suggests that many organisations felt that they sent the wrong individuals to the training which has limited its effectiveness.

The feedback from the post-training questionnaires and the follow up discussions with participants have indicated that many participants have begun to apply learning from the Programme in their organisations, with examples of:

* Changes in roles and responsibilities to better match individuals’ communication preferences
* Broadening and enhancing volunteer roles to help build their involvement in the organisation and improve team working
* Changes in communication methods and messages to better match individuals’ communication preferences
* Different approaches to strategic planning and action planning
* Different approaches to risk assessment and management
* Taking a longer-term approach to strategic and marketing planning
* Different approaches to developing fundraising strategies.

Whilst change has started, the interviewees were at pains to suggests that operational constraints arising from small management teams and other pressures had prevented them from making as much progress as they would have liked. Feedback suggests that participants have further plans to implement learning once the current pressures of funding applications have reduced.

Whilst the Programme has received positive feedback overall from the majority of participants there were some issues highlighted in the evaluation in terms of:

* Pre-training information and planning process
* Obtaining evaluation consent
* Structure of the training days
* Delivery methods
* Networking post training.

It also has to be acknowledged that the evaluation has been limited by the limited examples of implementation following the Programme as well as difficulties in obtaining retrospective consent from participants to take part in the evaluation

These issues are considered in the recommendations below.

 **6.2 Recommendations**

**6.2.1 Pre-training information and planning process**

*Pre-training information*

It is recognised that information on the planned Programme content was included in the application process and in pre-training emails from MGS. However, the feedback suggests that this has either not been interpreted as might have been expected or did not reach the people who attended the training (there were personnel changes between intended and actual participants). Many of the organisations had a different expectation of the content of the Communications and Community Engagement training and, as a result, feel that they sent the wrong people to the course. The pre and post training profiles indicate that this training was attended by a different mix of participants, with a greater number of more junior team members than other modules. Few people who attended appeared to have responsibilities for marketing – one of the key elements in the training.

It would, therefore, be beneficial to re-issue the detailed information on the training content and outcomes immediately prior to attendance ensure that the necessary information is received by people who are attending the training, given the variance between planned and actual attendees.

*Planning process*

In general, the content of the Programme was well received. However, there was feedback from some individuals that some of the examples used in the training content were “too corporate” or “not appropriate for an organisation with a management team of three people”. Consideration should be given to gathering some pre-training profile from participating organisations to enable the training provider to match examples to organisational profile, particularly size of organisations.

**6.2.2 Evaluation process**

*Obtaining consent*

Whilst organisations were made aware of the evaluation and the expectation that they would participate in it during the application process and at training launch, participant engagement with the evaluation varied considerably. Uptake of the quantitative online approach was generally good, with high levels of response pre and post training (with the exception of the post Governance training). Engagement with the follow-on discussions was much more limited. Whilst just over half of the participants (47 people) indicated that they would be willing to have a chat with the evaluator, responses to interview requests were much more limited.

There is a need to make the process of obtaining informed consent to the participate in the evaluation much more robust. This was not possible for this evaluation as the application process was in progress before the evaluation was commissioned. This meant that retrospective requests for contact details for the evaluation had to be made in order to comply with GDPR regulations.

For the Programme extension, informed consent should be requested at the outset, enabling contact details for participants to be provided at the start of the Programme delivery. This will enable the evaluator to maintain contact directly with participants throughout the Programme.

*Accessing impact*

The feedback from the post training questionnaires and the follow up discussions indicates that organisations have started to apply learning, indicating initial changes in behaviour following the training. However, the application of learning at an early stage making it difficult for organisations to determine the impact of these changes as part of this evaluation. It is not yet possible to attribute achievement of the learning outcomes (as detailed in the evaluation framework).

To address this, there will be a further follow up with participants during 2023 to a capture what has resulted from the learning in the Programme and to determine the extent of the achievement of the Programme outcomes and the sustainability of the initial behavioural changes following completion of the Programme modules.

**6.2.3 Structure of the training days**

Due to Covid 19 restrictions the training delivered online, resulting in many benefits for organisations in terms of time commitments to attending training. There were some issues which did arise out of this approach, which could be addressed in the Programme Extension. These are:

* Providing greater opportunities at the start of the modules to introduce training participants and training facilitators. Given that the modules may not be attended by the same participants each time, this may need to be conducted on the first session of each module
* Providing more screen time breaks to minimise the amount of time participants are in front of the computer displays. Many participants found the sessions too long and tiring.

**6.2.4 Delivery methods**

The majority of participants in the post questionnaires and follow up discussions enjoyed the delivery styles of the facilitators. However, a small number of participants did not find the delivery approach taken in the leadership module engaging. This appeared to affect one particular Insight Colour in particular.

It is recognised that delivering training completely online can impact on engagement with the audience. However, these participants disengaged from the learning messages in the module which had a resultant impact on their engagement with the remainder the Programme, and prevented them from recommending it to other colleagues. Therefore, it may be beneficial to consider how the preferred communication styles and methods of each of the Colours could be incorporated into the delivery approach.

**6.2.5 Networking post training**

Feedback from the post training questionnaires and the follow up discussions indicated that participants had especially enjoyed the opportunity to meet and network with colleagues from other organisations. The opportunity to share experiences and learn from each other was highly valued. Whilst some participants have followed up with others following the Programme, many have not due to daily work pressures. Given that an outcome of the Programme was to encourage networking, consideration could be given to developed a more formal network for participants to encourage ongoing communication, information sharing and practice development.