

# Summer 2023 monitoring and evaluation

A snapshot of our charities'  
progress in the last year

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October 2023

THE  
FORE

## Executive Summary

This is a report on the progress and experiences of the 22 charities and social enterprises who took part in The Fore's Summer 2023 monitoring and evaluation (M&E). Our M&E involves an online meeting followed up by a short data survey. To measure progress, we score the charities against transformational targets agreed with the charity at the start of the grant.

Our proportionate M&E process saves leaders time. Its conversational nature encourages both them and us to reflect and take any learning garnered into the year ahead. And it is a vital opportunity for us to stay up to date as we plan how best we can support them in the coming months.

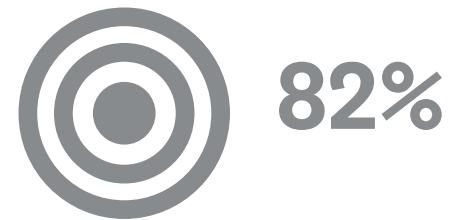
Our stats show that the 22 charities achieved a lot in the past year, from growing beneficiary numbers, to incomes. Their average score against targets was an extraordinary 82%, but this is only half the story. Many went above and beyond what they set out to achieve but such resilience always comes at a cost. In a world of leadership burnout, we are working hard to increase the support we can provide to founders and CEOs to try to ensure they are able to continue to be the creative, adaptable, inspiring leaders their organisations could not do without.

A full breakdown of how our charities performed against their targets can be found in the Breakdown of target scores by category table (Appendix A).

Cover image: SEAS Sailability



## Key stats from our Summer 2023 monitoring and evaluation



### score against transformational targets

Based on 66 targets scored across 22 charities  
Compared to 79% scored in our Spring 2023 M&E



73%

increase in  
beneficiaries reached  
(191,419 additional)



22

additional locations  
operated in



55%

increase in programmes/  
projects offered  
(89 additional)



45%

increase in volunteers  
(711 additional)



47%

increase  
in staff time



25%

### growth in total income

24% growth in restricted income  
39% growth in unrestricted income

Increases are from last year to this year. Percentages (excluding target score) represent median increases.

## A fighting spirit

While the overall stats show successes for our charities, many had initial failures, but refused to give up and used knockbacks as a learning opportunity. Their ability to pivot and handle adversity is one of the main ingredients for their successes.

For example, one of our charities was unsuccessful in a significant application for large-scale grant funding. However, taking onboard feedback from the funder, they sought partners to co-develop a user-centred strategy and have reapplied as a consortium. Another charity facing delays of over a year to move into a building (due to unexpected remedial works) has worked tirelessly to secure multiple temporary licences so that some programmes could still be offered in the interim. The message is clear: our small charities refuse to give up, but we also know that this takes a toll.

## The quest for financial sustainability continues

Our charities have seen strong income growth, with an overall average increase of 25%, but most continue to find the quest for financial resilience a challenge. Many felt that accessing the grant funding they need is increasingly tough, with a shift towards small scale and time limited cost-of-living grants. While helpful in the short-term, they noted that this shift is often at the expense of the more sought after, large unrestricted multi-year grants. Despite this challenging grant landscape, we have seen success. For example, one charity with a target of securing £40,000 of grant funding secured grants for at least £75,000. Another with a target of securing 6 grants in the last year secured 8.

Our charities also report that it is becoming increasingly challenging to diversify income streams through developing products and services, with many potential customers affected by the cost-of-living crisis. It is unsurprising therefore that our charities scored less well against income diversification targets. Again though, we are seeing success and innovation. For example, an arts charity ran a cocktail bar alongside a local film festival that was so successful the income generated was used to fund another film festival for beneficiaries. The bar is now an ongoing income generating fixture.



### **Case study: Sal's Shoes – A triumph in bolstering income**

#### **Score against targets: 100%**

Sal's Shoes provides preloved shoes to children in need in the UK and worldwide. From a small seed in 2013, grew a mighty oak, with Sal's having distributed 2.5 million pairs of shoes by 2021. While Sal's had successfully kept pace with growing demand, the volunteer-led organisation knew it needed greater capacity to continue to grow and develop.

Using funding from The Fore, the founder CJ Bowry, then operating in a volunteer capacity, was able to leave her existing job in 2021 and devote herself full time as CEO. This provided the crucial capacity to focus on making the organisation more sustainable, via bolstering income streams to meet growing core costs, and planning for ongoing growth.

Having a full-time CEO has enabled a step change. In the past year Sal's distributed over 1 million pairs of shoes internationally (vs. a planned 500,000) and over 75,000 in the UK (vs. a planned 50,000). This growth was matched in their income, bringing in £230,000, including from corporate partnerships, vs. their goal of £144,000.

While financial success is undoubtably down to the determination of the leader, CJ believes it would not have been possible without tapping into The Fore's pro-bono network. We introduced her to finance expert Mark Tantom, a former Vice Chair at Deloitte, to help lay the foundations for rapid income growth and two years later he now Chairs the charity!



**CJ Bowry, Sal's Shoes**



### Tech: tread gently

Our 2022/23 impact report highlighted the transformational benefits of embracing tech. However, this round has shown that tech isn’t always the answer. One charity, providing one-to-one in-person English tutoring, sought to increase reach through utilising an online learning platform. However, in practice the platform added a clunky layer to the tuition process and removed the one-to-one connection between tutor and child that was so crucial to successful outcomes. The charity has since reverted back to its in-person recipe for success. Another charity sought to diversify its income streams through a corporate social responsibility (CSR) offer. To support them with this they had planned to use a CRM data system. However, they found the platform to be too expensive and are now working to find a more appropriate alternative.

Questions to ask when considering tech solutions might include: Will it work for our beneficiaries? Is it proportionate? Are the costs manageable?

### The power of the partnership

Partnerships are enabling our charities and social enterprises to extend the quantity and variety of their programmes and their geographical reach in ways that would not have been possible alone. For example, one social enterprise, through capitalising on the established networks of another social enterprise, was able to reach new beneficiary groups, including the traveller community.

Many have also been reaping the rewards of partnerships with universities. One university helped a charity secure funding for much needed equipment. Another organisation is collaborating with universities to better understand the potential of new income streams to bolster financial resilience. Another received funding from a university to recruit an individual to develop a sustainable funding strategy. This same organisation has also set the students a task, and the outcomes will feed into their reports on social and environmental impact for potential business partners in the future, increasing their likelihood of success.

Never underestimate the power of a partnership and remember that potential partnerships may not lie in the most obvious of places.

### Appendix A: Breakdown of target scores by category

Category of target	Number of targets evaluated	Average score against target	Score as a %	Change since Spring 2023
<b>Increase financial sustainability</b>	<b>17</b>	<b>4.1</b>	<b>81%</b>	<b>9%</b>
Through public sector contracts	1	5	100%	26%
Through grants or donations	8	4.1	83%	19%
Through earned income/sales	5	3.4	68%	1%
Through a mix of the above	3	4.7	93%	3%
<b>Expanding charitable activity</b>	<b>20</b>	<b>4.3</b>	<b>86%</b>	<b>4%</b>
By developing new products or services	2	3	60%	10%
By reaching new people	13	4.4	88%	-4%
By expanding into new areas	3	4.7	93%	n/a
Improving impact of programmes	2	5	100%	0%
<b>Increasing organisational capacity</b>	<b>14</b>	<b>4</b>	<b>80%</b>	<b>-3%</b>
By improving structure and governance	5	4	80%	-20%
Through research, evaluation and impact assessment	2	5	100%	10%
By improving marketing or developing profile	1	5	100%	100%
By nurturing partnerships	6	3.5	70%	-25%
<b>Increasing efficiency</b>	<b>9</b>	<b>3.7</b>	<b>73%</b>	<b>-12%</b>
By increasing use of volunteers	6	3.5	70%	-10%
By strengthening systems and processes	3	4	80%	-8%
<b>Strategic planning</b>	<b>6</b>	<b>4</b>	<b>80%</b>	<b>27%</b>

### Appendix B: Our Summer 2023 M&E charities and social enterprises

Organisation name	Amount funded	Location	Key themes
<a href="#">The Association of Accessible Employers CIC</a>	£30,000	Throughout the UK	Social equity and inclusion
<a href="#">Body Dysmorphic Disorder Foundation</a>	£14,850	Throughout the UK	Mental health and well-being
<a href="#">Citizenship for Life CIC</a>	£30,000	South West	Social equity and inclusion; Youth opportunity
<a href="#">Cultivate Communities (formerly Cultivate Cornwall)</a>	£30,000	South West	Social equity and inclusion; Sustainability
<a href="#">Curious School of the Wild CIC</a>	£30,000	South West	Social equity and inclusion; Sustainability; Youth opportunity
<a href="#">Ersilia Open Source Initiative</a>	£30,000	Outside the UK	Social equity and inclusion
<a href="#">Escape2Make</a>	£30,000	North West	Mental health and well-being; Social equity and inclusion; Youth opportunity
<a href="#">Family Compass</a>	£21,800	South West	Mental health and well-being; Youth opportunity
<a href="#">Glasgow Artists' Moving Image Studios SCIO</a>	£30,000	Scotland	Social equity and inclusion; Youth opportunity
<a href="#">Jacari</a>	£30,000	South East; South West	Mental health and well-being; Social equity and inclusion; Youth opportunity
<a href="#">Liskerrett Community Centre</a>	£30,000	South West	Mental health and well-being; Social equity and inclusion; Youth opportunity

Organisation name	Amount funded	Location	Key themes
<a href="#">RAIS Lancaster</a>	£26,900	North West	Mental health and well-being; Social equity and inclusion
<a href="#">Red Hen Project</a>	£15,000	East of England	Mental health and well-being; Social equity and inclusion; Youth Opportunity
<a href="#">Refuge4Pets</a>	£30,000	South West	Mental health and well-being
<a href="#">Safe Soulmates</a>	£14,500	East of England	Mental health and well-being; Social equity and inclusion
<a href="#">Sal's Shoes</a>	£30,000	Throughout the UK; Outside the UK	Social equity and inclusion; Sustainability
<a href="#">SEAS Sailability</a>	£12,000	Wales	Mental health and well-being; Social equity and inclusion
<a href="#">Skilz Academy</a>	£30,000	Scotland	Mental health and well-being; Social equity and inclusion; Youth opportunity
<a href="#">Small Acts of Kindness</a>	£30,000	East of England	Mental health and well-being; Social equity and inclusion
<a href="#">Tempus Novo</a>	£30,000	Yorkshire and Humberside	Social equity and inclusion
<a href="#">The Harbour Project</a>	£29,722	South West	Mental health and well-being; Social equity and inclusion
<a href="#">The No Collective</a>	£9,904	London	Mental health and well-being; Youth opportunity