



Autumn 2023 insights and data

A snapshot of our portfolio
charities progress in the last year

February 2024

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This report highlights the progress and experiences of the 21 charities and social enterprises that participated in The Fore's Autumn 2023 monitoring and evaluation (M&E) process. Our M&E involves an online conversation followed by a brief data survey. Progress is measured by comparing each charity's performance against their transformational targets agreed at the grant's onset.

Despite growth across all our metrics this has been a tough year for many of our portfolio charities, exacerbated by the ongoing cost of living crisis. Our charities have persevered and worked tirelessly to continue to deliver but we know that this dedication places a heavy burden on their leaders. Such sustained pressure is leading to a high rate of burnout across the broader sector so we are trying to refine and expand our support to better help and empower our charities. This year we have:

- Established a series of peer-to-peer sessions to support our charities to share practical solutions to widespread challenges in an increasingly harsh funding landscape;
- Bolstered and expanded our pro bono network with more individuals that have the skills our charities desperately need to strengthen resilience and grow their impact. We have worked to make the process smoother for our charities to access these skills.

In the longer term, we have put in place fundraising targets for ourselves that will allow us to increase the amount of grant funding we offer (currently capped at £30,000 per organisation).

Cover image: Lyra

Effective recruitment and induction processes: A catalyst to realising organisational goals

Our charities are being hampered by challenges of staff recruitment and retention. Staff are leaving at a rapid rate, with employees generally staying for shorter periods of time. This is interrupting momentum and overstretching existing capacity, leading to burnout in remaining staff and leaders.

When leaders' time is already constrained, it can be tempting to spend less time on the recruitment and induction process. However, our charities are showing that investing time up front is essential to secure and retain the talent that will lead organisations and their mission forward.

Our charities have now placed a greater focus on professionalising the recruitment process to find the best fit for roles to disrupt the cycle of staff turnover, with many now implementing tasks as part of their interview process. Our charities have also focused on strengthening the induction process. This includes providing key performance indicators (KPIs) to new staff to ensure expectations are established from the beginning. Many charities have also been developing structured onboarding and training programmes to improve retention by helping staff feel better supported in their roles.

Recognising the power of experts by experience

Our charities show that having individuals with personal experience of the challenges the organisation is solving helps remove the risk of the echo chamber effect by bringing in new perspectives and insights. This leads to more nuanced and smarter decision-making and more impactful outcomes.

Our charities have been embedding experts by experience across their organisations, from paid staff and volunteers to advisory boards and trustees. One charity established a youth advisory board primarily made up of young programme alumni who are shaping the charity's strategic direction and programme content. Another charity has recently recruited four people onto their board with direct experience in the issues the organisation is seeking to address. This includes three parents of beneficiaries and a community member that previously participated in their programmes.

Employing fundraisers: A silver bullet?

Most of the small charities we are backing share a common goal: to achieve financial resilience to both meet demand and grow to unlock their full potential. In an incredibly competitive funding climate it is unsurprising that when leaders do manage to secure funding for staff, they see recruiting a dedicated fundraiser as the only way to crack the financial sustainability enigma. However, this round has reinforced our understanding that recruiting fundraisers is often not the answer.

Where charities did decide to recruit external fundraisers, it usually wasn't plain sailing. Success was hindered by recruitment and retention difficulties, and challenges in aligning fundraisers with the organisation's nuances.

Echoing previous findings, the charities that had the most success with income generation chose not to recruit external fundraisers from the outset. Instead, they sought to increase the capacity of their leaders to focus on fundraising by, for example, recruiting operational roles to free them from day-to-day delivery. One such charity exceeded their additional income generation target by an impressive 420%.

Income generating partnerships: All that glitters...

While partnerships come in many forms, our charities are often seeking potential fee-paying partnerships to generate income for their programmes. However, they have reported greater difficulty in securing these partnerships, with one charity having a potential groundbreaking partnership to help them scale nationally unexpectedly withdrawn.

Even when partnerships are locked in, the income generation element often fell short of expectations. One charity noted a trend in partners being more reluctant to offer financial support due to the belief that them providing employment opportunities for beneficiaries was sufficient. Another secured a partnership with a school, but it never got off the ground because key school personnel didn't buy into it in practice.

Questions our charities wish they had asked before embarking on partnerships include: Has buy-in been secured from all relevant stakeholders in the partnership and not just those leading on partnership negotiation? Are expectations aligned across all parties before starting?

Case study: Stable Lives: Turbo-charging growth to address the mental health crisis

Score against targets: 96%

Established in 2014, Stable Lives supports adults and young people experiencing mental health challenges to rest and recover, through nature and equine therapy.

Their proven track record, combined with overwhelmed NHS waiting lists, meant that demand was skyrocketing, with an urgent need to increase their capacity. However, for Founder and Director Carrie Byrom MBE, there just wasn't enough hours in the day, with a focus on existing day-to-day operations leaving little time for wider organisation strategy and growth.

Using funding from The Fore, Carrie recruited a Project Support Officer to free up her time to focus on strategy to make the step change the organisation needed to meet the escalating demand. With this new-found time, Carrie has been able to cultivate strategic partnerships and establish an evaluation framework to better demonstrate their impact and, in turn, secure more grants and commissioned work.

In the space of just a year, they are already making strides in charting a path to financial sustainability, exceeding their income projections by an impressive 75%. They have also made strides to meet the insatiable demand, almost doubling the programmes on offer and increasing beneficiaries by 67% to 540.

This is just the start of their growth story, with plans to use their remaining funding from The Fore to realise their ambitions and go nationwide within the next few years.



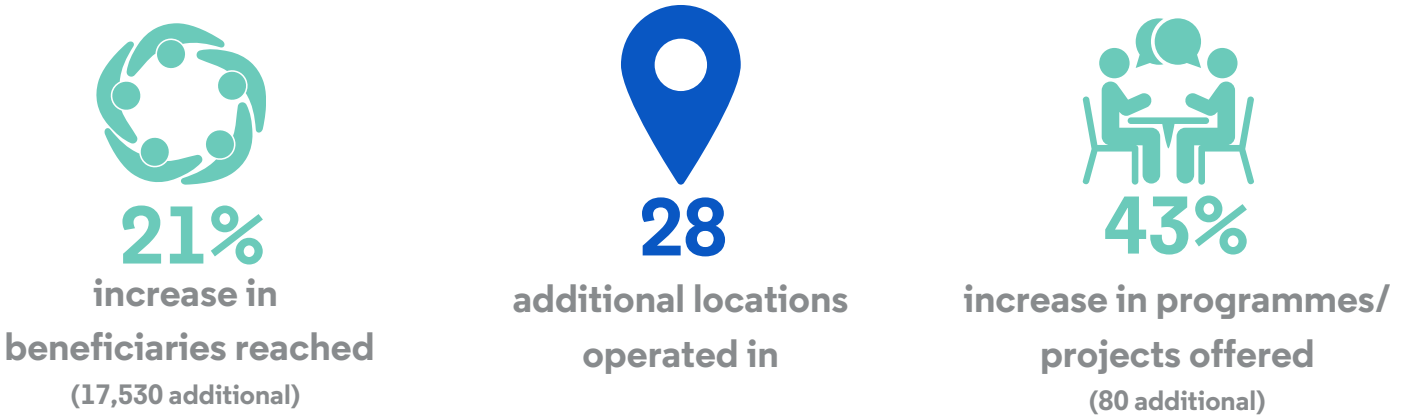
Carrie Byrom, Stable Lives

Key stats from our Autumn 2023 monitoring and evaluation



score against transformational targets

Based on 60 targets scored across 19 charities
Compared to 82% scored in our Summer 2023 M&E



growth in total income

34% growth in restricted income
41% growth in unrestricted income

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

Our Autumn 2023 portfolio charities:

- Carefree • Clowns Without Borders UK • Concrete Jungle Foundation • Essex Respite & Care Association • Fowler’s Syndrome UK
- Goods for Good • Hope Counselling Dundee • Just Psychology CIC • Lyra • Manchester Urban Diggers CIC • MindSpace Stamford
- MN Well Child Support • ParaCheer International CIO • Potential Kids • Restart Enterprise CIC • Shine A Light Childhood Cancer Support
- Stable Lives • Streetlight UK • The Linacre Institute • The Recruitment Junction • Trauma Treatment International

Breakdown of target scores by category

Category of target	Number of targets evaluated	Average score against target	Score as a %	Change since Summer 2023
Increase financial sustainability	13	3.2	63%	18%
Through public sector contracts	2	2.5	50%	50%
Through grants or donations	4	4.3	85%	-2.5%
Through earned income/sales	6	2.3	47%	21%
Through a mix of the above	1	5	100%	-7%
Expanding charitable activity	20	4.1	82%	4%
By developing new products or services	5	4.4	88%	-28%
By reaching new people	10	4.3	86%	2%
By expanding into new areas	4	3.5	70%	23%
Improving impact of programmes	1	3	60%	40%
Increasing organisational capacity	23	4	81%	-1%
By improving structure and governance	13	4.2	85%	-5%
Through research, evaluation and impact assessment	5	4.4	88%	12%
By improving marketing or developing profile	1	4	80%	20%
By nurturing partnerships	4	3	60%	10%
Increasing efficiency	1	3	60%	13%
By increasing use of volunteers	1	3	60%	10%
By strengthening systems and processes	0	n/a	n/a	n/a
Strategic planning	3	4	80%	0%
Total	60	3.9	77%	6%