

St Katharine & Shadwell Trust

# ***THE TRUST PROJECT:*** **an evaluation**

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## I. Introduction

### Models of capacity building

‘Capacity building’ as both a term and a process can incorporate a wide range of goals, focuses and outcomes. For example, some capacity building projects might aim to identify existing skills and build on them; elsewhere the focus may be on developing the ability of leaders to participate in decision-making about projects. Community-based work often aims at developing existing skills and resources at the community level. The process of identifying capacities and assets, both individual and organisational, as opposed to identifying needs, can also be the first step on the path toward local regeneration.

Capacity building can entail different levels of intervention, from the level of individual development (which includes for example formal training or education targeted at working professionals, and other more informal opportunities for learning); the community development level (which emphasizes collaboration, community alliances, and sharing information, as well as community involvement in assessing needs, training programmes and technical assistance); and the strategic local development level (which includes strategic planning and visioning processes, support for infrastructure development; networking, communication, and information dissemination; needs assessment; and accreditation and certification. Many capacity building initiatives simultaneously incorporate activities at several levels.

Thus capacity building is generally concerned with growing the capacity of all stakeholders involved in community development, strengthening skills, abilities and confidence, thereby enabling community based and voluntary groups to develop their local infrastructure and to work more effectively.

Against this wider backdrop, the Community Foundation Network, Capacitybuilders and the ChangeUp programme, along with local partners, work to promote capacity building through project work, but also by improving support to third sector organisations. The Capacitybuilders Community Foundations programme, of which *The Trust Project* was part, accordingly sought to generate innovative models and approaches to capacity building with local community and voluntary organisations. The projects funded under the programme it was hoped would also provide lessons of wider relevance to the sector, and to community capacity building practice and infrastructure development.

### About St Katharine & Shadwell Trust

St Katharine & Shadwell Trust is a Community Foundation that raises funds and awards grants to help run and support a wide range of community capacity building projects in East London. It is committed to tackling disadvantage and ensuring that local people’s ideas and aspirations for improving the area in which they live are heard.

The Trust's activities began in the two areas known as St Katharine and Shadwell, and have now spread into wider East London, in Tower Hamlets, Hackney, Newham, and the City of London.

Some of the most deprived communities in the country are found in this area of East London. Despite the successful economic development of the City and Docklands, there are high levels of overcrowding, poverty, illness and general deprivation. An area of many contrasts, expensive private residential developments that accommodate the well-off sit side by side with social housing that is home to the poorest sections of the population. Reflecting the wealth of different cultures and the contribution of the many ethnic groups in East London, over a hundred languages are spoken in the boroughs where the Trust works. And the population contains the highest proportion of young people in the country.

Scheduled to host the Olympic Games in 2012, regeneration will continue as a firm priority for the area, with sport and entertainment rising to prominence.

In this context, the Trust has supported a wide range of capacity building initiatives in the area, from playgroups to pensioner clubs, training for the management of voluntary groups, and specific projects such as the Shadwell Basin project, a water activity centre, Tower Hamlets Summer University, and the Artist in Residence programme for 16 local schools which has run for 15 years. The Trust was also instrumental in developing the Tower Hamlets Education Business Partnership. Invited to administer small grant programmes in Tower Hamlets and the adjacent areas of Hackney

and Newham, the Trust set up panels with local knowledge and expertise and extended its activities throughout the East End.

*The Trust Project* emerged out of this experience.

### **About *The Trust Project***

*The Trust Project* was one of eight initiatives to be supported through the Capacitybuilders programme in 2007-8. Capacitybuilders works in partnership to build capacity in the Third Sector. Within its 2007-8 programme it sought to support eight demonstration projects under the 'Learning and Innovation' funding theme. Projects not only were to be aimed at building the capacity of voluntary and community organisations in their local areas, but they were also intended to be innovative, to be priority focussed, and to engage with diverse or socially excluded communities, while also generating lessons for funders about supporting the capacity building process as well as for the longer term involvement of community foundations themselves. Experience with securing match funding from public or private funders was also required.

Through its work on grant-making with local community and voluntary organisations across the East London boroughs, St Katharine & Shadwell Trust had found that community and voluntary organisations' lack of success in obtaining grant funding was often linked to a failure to make an effective written case as part of the grant applications process. Alongside this, the range of communication skills needed to concisely profile an organisation or

a project, make a case for it, carry out basic self-assessment work, or draw up simple financial plans was often found to be lacking. They observed that the result of this was that small, often minority-led groups often missed out on funding from which there was a strong sense nonetheless that they would have benefited.

*The Trust Project* was designed as a capacity building project that would particularly tackle this skills gap. Using a blended approach to training, the objectives of the project were to increase confidence among small and grassroots voluntary and community organisations and their representatives in using language effectively in a range of settings. These included primarily the forms of expression and written presentational skills required by the funding application process, but also the communication skills associated with such settings as public meetings and consultation processes.

*The Trust Project* ran as a pilot project over 5 months during 2007-8 in the Tower Hamlets area, one of the four boroughs in the Trust's area of benefit. The centrepiece of the project was a partnership model for delivering skills development that combined a training programme with face-to-face and 'virtual' mentoring, and a programme of visits. A key feature was the involvement of volunteers from the business sector in the mentoring aspect of the programme. The training element was also distinctive in the way it was progressively adapted to fit alongside the needs of the trainees as their learning experience unfolded.

It is hoped that in due course the model can be offered more widely, and even replicated in other localities.

## Evaluation of *The Trust Project*

The Capacitybuilders Community Foundations programme, within which *The Trust Project* received grant aid, has been independently evaluated by external consultants. This evaluation of *The Trust Project* has been undertaken by Peter Grant and Barbara Reid of Cass Business School on behalf of St Katharine & Shadwell Trust, as part of the project plan for *The Trust Project*.

The approach to the evaluation was shaped by theories of change and social action. The evaluation itself focussed on three basic questions:

- **Strengthening of skills:** How well and in what respects were individual skills strengthened as a result of people's involvement in the project?
- **Infrastructure:** In what respects was there widening out and expansion in the local infrastructure base as a result of the project?
- **Momentum:** How successful was the project in terms of creating forward momentum for participating stakeholders?

The evaluation process followed an action research approach, with the evaluators 'embedded' in the project, and a member of the evaluation team observing and participating in the training programme, in key coordination meetings and in feedback sessions. Emerging evaluation themes were shared with the project delivery

team at various stages during the project. Data gathered through participant observation was supplemented by focussed discussion and feedback evidence.

## **The Evaluation Report**

The report continues on the following basis:

- Chapter 2 sets out *The Trust Project* in detail and describes the component elements;
- Chapter 3 discusses the operation of the project and its results; and
- Chapter 4 sets out the main lessons to emerge from the project and assesses the prospects for transferability.

## 2. *The Trust Project*

In recent years there have been a great many projects and initiatives aimed at strengthening the capacity of small voluntary and community organisations. Not all of these groups are the same however, and smaller organisations in particular often lack skills amongst their supporters and representatives, and experience difficulty accessing the support they need. Starting from a relatively low skills base, these organisations are likely to find broad-based skills and knowledge training a poor match to their needs. This is because the challenges they face cannot be resolved by improving their knowledge base alone: they also have organisational and personal development needs alongside this. Integrating and applying new knowledge, while at the same time offering support to individuals as they go through this process are therefore areas that are key to the success of building capacity among smaller and less well established organisations.

### **Project goals**

*The Trust Project* was devised as an organic project that was aimed at giving small voluntary and community groups confidence in using simple language effectively. This was not just with a view to increasing not just their local profile and presence, but also in due course to lever up their rate of success in terms of accessing grant funding.

The goals of the project in detail were as follows:

- ***Change in capacity:*** the development of confidence in using simple language effectively in funding applications, in public meetings and consultations, and in participants' private lives;
- ***Number of groups to be supported:*** direct support for up to 15 organisations and individuals, with drop-in sessions and networking aimed at bringing additional benefits to other groups;
- ***New partnerships and skills among capacity building organisations:*** stronger, clearer partnerships, with less competition and greater understanding of, and by, applicant organisations.

One of the overall aims of the project was to develop a model of capacity building that could be replicated elsewhere.

### **The core training programme**

The key structural feature of the project was a training programme that focussed on improving communications skills among individuals from voluntary and community groups. The programme therefore was based on a model of capacity building that focussed in the first instance on the development of individuals who were working for

grassroots groups. The capacity building was to be delivered through training.

However because of its approach, and the blended model of training that was adopted, *The Trust Project* can be said to be unique and ground-breaking in its approach to capacity-building through training. The training programme was created for the Trust by consultants specialised in training for capacity building. It had a firm grounding in action learning and group participation principles, and comprised a number of inter-locking elements.

The rationale for this blended approach was one of effectiveness. The Trust was keen to create a learning environment where there would be ample opportunity to integrate and apply learning, rather than simply 'receive' it passively. Opportunities were created for participants to practice their developing communication skills, and to do this in a supportive yet challenging environment, which in turn would contribute to the confidence building aspect of the programme.

The learning objectives for the programme were for each participant to have learned about each of the following, and to have gone some way towards integrating their new learning through practical exercises and experience:

- How to describe and present a project or the work of their organisation to an external body or organisation, including potential funders or sponsors;

- How to justify their project and explain the need for it (by researching local service provision, and the wider context);
- How to identify the range of resources needed to underpin a project, in terms of staff, premises, equipment, and so on;
- How to generate a budget for a project;
- How to go about engaging service users in the process of developing a project.

The programme was then delivered over a period of 5 months from 2007-8. The following were the key constituent elements of the delivery framework:

- 5 workshop-style training sessions for participants of 4 hours duration each;
- Individual one-to-one mentoring for each participating trainee;
- An individual relationship for each participant with an e-mentor, conducted via email;
- A programme of 4 visits, comprising the Idea Store in Tower Hamlets (computer resources), provision for observation of meetings, and a project visit (to the projects of the other participants).

In addition to the formal training element therefore, the mentoring and e-mentoring arrangements were intended to provide support and contact between the workshop sessions, and create opportunities for participants to test their new knowledge and learning in a professional environment. In this respect, the mentoring arrangements added a further dimension to the voluntary sector and volunteering focus of the project, as all were volunteers from local businesses and institutions.

Coordination of the various elements of the delivery of the programme was provided by the Trust. This included recruitment, identifying and liaising with volunteer mentors on occasion in conjunction with News International, liaising with participant trainees, and liaising with the trainers. The training element of the programme was delivered in premises belonging to News International, where the Trust is co-located, and so they also played a practical signposting, hosting, and anchoring role on training days.

## **Recruitment and retention**

There were two main recruitment tasks within the project: first, the recruitment of volunteer mentors; and second, the recruitment of the individual trainees who would benefit from the training.

Volunteer mentors were drawn from key local organisations, with the majority coming from the very large firms News International and Crédit Suisse. Other organisations that supported the initiative

included the Central Foundation Girls School, Birkbeck University, Allen & Overy, and Société Générale. Within News International, in conjunction with their strategic planning group for example, an appeal for volunteers was made via the corporate intranet site. Overall, 21 mentors and e-mentors were identified, which gave each participating trainee the opportunity to have their own mentor and e-mentor assigned to them.

Mentors were briefed through an induction session, and there was a further coordination meeting, and a review meeting at the end of the programme. Protocols for trainee-mentor contact were shared between both trainees and mentors.

Where recruiting participant trainees was concerned, the target groups that were to be the focus of the project comprised small, new, or 'struggling' voluntary and community organisations in Tower Hamlets. It was anticipated that many of these would be minority-led, faith based, and grassroots organisations, or umbrella organisations supporting these groups.

Working in partnership with the borough of Tower Hamlets, the Trust first identified a 'long list' of organisations that could benefit from the initiative. Within the long list, groups drawn from the Somali community, African men's and women's groups, faith groups, Bengali groups, youth groups, social enterprise groups, groups representing people with specific needs, such as learning difficulties, were all included. Groups on the long list were directly approached and asked to put forward nominees to join the project.

A group of 10 trainees was eventually drawn from 8 local grassroots organisations, representing a wide range of social interests and needs, including disablement, housing and the environment, homelessness, Bangladeshi youth, African women, the Somali community, and faith groups. The educational backgrounds of the trainees were also diverse, with a few having some higher education experience, and the majority with no post-compulsory education. Other factors were the inclusion of trainees with learning difficulties, and trainees whose first language was not English. Training places were offered free (i.e. at nil cost) to the trainees and their organisations.

### **The training workshops**

Participating trainees were required to attend all workshops, to work with both a mentor and an e-mentor, and to take part in and initiate a number of visits to other organisations. A review workshop is planned for September 2008 for all trainees.

The training workshops were devised to provide the following in each session:

- Space for trainees to report back on assigned work from the previous session;
- Input of structured content and time to explore and test the content;

- A 'business session', to make wider links with ongoing tasks, the programme framework and with the trainees own working context;
- A space for reflection; and
- A 'takeaway' session where trainees identified the session's key learning points.

The basic overall premise of the training was that participants on the programme would be able to bring an idea or a particular project that their organisation wished to pursue along with them to the first session. Thereafter they would effectively use the resources of the entire programme to develop this idea or project.

While on one level, skills were being learned, at the same time these could be applied in a meaningful way to a project that would have particular relevance for the participating trainee. The trainee therefore was receiving advice in relation to their particular project, while at the same time building confidence to be able to use the advice appropriately to develop the project's scope or specification. The training programme aimed to raise skills and confidence to a point where the individual would be capable of effectively articulating details of their project to an external audience, funder or other sponsor.

The approach to teaching and learning that was adopted in the workshops was designed to be responsive to the issue of different learning styles and diverse learning support needs. Team training

enabled for example 'two-speed' handling of learning assignments or recovery work to ensure that learners who dropped behind at any stage were helped back into the training day.

Varied content, in terms of the duration of tasks and the nature of the different components of the training days, was an important tool for keeping trainees engaged. The typical components of a training session would include:

- An opening session where trainees were invited to report back on a previous assignment or experiential element;
- Content sessions, where information and skills were introduced and explored;
- 'Business' sessions, where trainees were encouraged to engage in planning and prioritising in relation to their obligations and tasks for the training programme;
- Reflective sessions, where trainees were invited to reflect on the learning from the session;
- A 'takeaway' session where trainees were encouraged to consider what aspects of their learning from the day they might be able to put into practice, and how.

There was no formally assessed work included in the programme. However assignments or tasks were set up to encourage participants to draw on what they had learned and apply this to

their project or organisational environment. Many of the tasks provided opportunities to work with their mentors and e-mentors: one task for example involved writing about their project in 100 words and receiving constructive critical feedback from their e-mentor.

### **Funding, partners and governance**

The project was based on a co-funding model. The Trust received £50,000 in grant support from Community Foundations Network Capacity Building Fund. Match funding of £16,500 was secured from Jupiter Asset Management.

Match funding in kind was contributed by the following:

- News International (advice and mentoring, training room);
- Crédit Suisse, the Central Foundation Girls School, Birkbeck University, Allen & Overy, and Société Générale (mentoring).

Other partners in the development process of the project included:

- LB Tower Hamlets (recruitment);
- Alice Bigelow and Ali Rusbridge (capacity building trainers and consultants);

- Cass Business School (evaluation).

Throughout the project, the key partners met regularly to review progress, and ensure they had a clear stake in the delivery of the project. Administrative support and coordination was provided for the project from the existing St Katharine & Shadwell Trust team. *The Trust Project* was also included in the independent evaluation of the Capacitybuilders/ Community Foundations Network funding programme.

### 3. The Operation of the Project

#### Strengthening of skills

The Trust Project's primary focus has been on communication skills. However, evidence from the partners and participants in the delivery of the project points to the fact that skills strengthening has occurred in a number of areas. These are as follows.

- **Engagement in the learning process**

The majority of the participant trainees in the project had had little or no contact with post-compulsory, further or higher education. Expectations were that the training would be 'formal' or 'traditional'. However, the trainees' experience of the learning process was clearly different from this, and expectations were exceeded.

*I didn't expect as much as I got. Because it's spread out over 5 or 6 months it stays with you. It's not like other courses. The amount of information, what I've learned – it's the best I've ever been on in my life. I feel like I've been unconsciously learning.*

Trainees' comments

There is evidence that the structure of the overall programme as well as the basic content and approach played an important part here as well, in terms of being relevant and appropriate to the trainees' needs and in helping to build motivation and confidence in their learning abilities.

*It wasn't just the classes, it was being put in the right frame of mind. Thinking about the project work in a different way and tying everything into work. Remembering all the little bits you could go and apply outside.*

*When you meet your mentor, you discover who you are. When I wrote my '100 words' about my project for my mentor, through this I began to see the huge work that I'm doing.*

*It was a fantastic idea, the mentors, someone from the world of professional work. I know their advice is going to help me develop.*

Trainees' comments

The approach of the trainers in mediating the content and delivery of the training programme as it went along has been critical in the process of developing open attitudes to learning. The trainers very quickly saw the group's participants as having both clear similarities and differences, which needed to be worked with. Their approach was not only to have a clear

teaching and learning plan, but also to accommodate the need to be flexible within that plan in order to engage with the diverse expression of needs within the group, and adapt the delivery so that the content could be made accessible to all. Not predicted as such an important component of the training delivery at the start of the project, this was to become central.

- ***Widening out skills and knowledge***

Through the vehicle of communication skills training and building confidence in communications, it is clear that there has been a widening of skills in a number of different areas among the trainees that extends beyond the development of basic communications skills development itself.

The training programme incorporated the following elements in order to build confidence in relation to communication:

- Introduction to key concepts and their use;
- Project management language and how it is used;
- Explanation and practice exploring jargon;
- Opportunities for structured communication through tasks and assignments, involving fellow trainees, mentors, the trainers, and others.

Beyond this, trainees point to the following areas where they have benefited. These can be seen as personal development which will not only be of personal benefit, but will also benefit the organisations with which trainees are involved. They include:

- Knowledge about fund-raising and the process of preparing fund-raising proposals;
- Project planning techniques and activity planning;
- Delegation and managing people;
- Understanding management systems and why management information is important;
- Aspects of financial management;
- Time management and dealing with priorities;
- Public speaking, communicating with different audiences, listening
- Gathering knowledge about other organisations and the fields they are working in.

*Before, I didn't have the courage to get people together and ask them to do things. Now I'm delegating more work, I'm more confident about that. It's freeing up more time, giving us more hands.*

*I've learned about getting funding applications right, getting to understand who the right funders are. Learning about budgeting and cash flow – I've loved it!*

Trainees' comments

There is evidence of reflective practical skills being appreciated by trainees as they begin to apply the skills developed through the training programme.

*When I go back to work and put the things I'm learning on display, like the project planning techniques, people get curious about them. But if you'd asked me to go on a management course, I wouldn't have been interested. This is more practical – skills to structure work, think about horizons, package ideas...*

*Many organisations are short of funding because of short term thinking. If you know where you're coming from, you know where you are now. When you have a dream, you also know how to begin to plan to get there.*

Trainees' comments

There was also evidence of an understanding that different skills are suitable for different purposes, and of the way that skills can be used as tools in different settings.

*The exercises about presenting our projects – public speaking, listening skills, - looking at the whole picture before you have an answer. I've learned I can't do everything alone. I have to consult, do research. Time management, planning, sharing, listening to other people dealing with the same issues as me. It's sitting in the hot seat.*

Trainees' comments

In terms of personal skills development, trainees also pointed to the impact of the experience of being part of the training in terms of how they reflect on their own work and career.

*I don't feel intimidated at dealing with professionals. I'm better at saying things in two minutes. Before, my thinking was too narrow. The visits made me realise I needed to check myself, be ready to ask questions.*

*It feels that if I asked my manager if I could do such-and-such a project that I'd be given a chance now. It's made me reflect on my work and where I should be.*

Trainees' comments

- **Confidence building**

The training programme was predicated on the notion that confidence building would support the development of skills and knowledge among the trainees. The effectiveness of the programme in confidence building terms is perhaps exemplified by the fact that participating trainees were actively applying skills, information, and tools during the course, with two participants having drafted funding applications by the end of the training period.

Within the training programme, key elements had a twin function: first, by behaving as a task for which trainees would have to apply skills just learned; and second, by providing an opportunity for reinforcing confidence. Thus for example, presentation exercises in class about specific aspects of project management related to the participant's own project led on to form the basis of presentations given to mentors or e-mentors.

*At first I thought [the mentors and e-mentors] were like supervisors, like I'd have to report to them four times a month. It wasn't like that. It was really useful, dealing with them. Working on my project, I began to get some signposting. It was good for my work.*

Trainees' comments

Confidence building was also achieved through a layered method, that comprised:

- Space to share experiences with fellow trainees, for example informally, and within the reflective space element of the training programme;
- Opportunities for trainees to learn from their peers (i.e. from each other), though visits to each other's projects for example;
- The use of trainers who knew the local context well, and who 'knew the same things they knew' where the trainees were concerned, which created confidence in the relevance of the content of the training programme;
- The cultivation by the trainers of a climate of discovery and expansion of awareness in such a way that the different learning needs amongst the trainees could be catered for; and
- The use of role models at different levels within the programme (e.g. the involvement of staff from St Katherine & Shadwell Trust as facilitators for the reflective elements; the involvement of the mentors and e-mentors). This meant that the learning team was strongly multi-cultural and cross-gender, reducing the potential for a gulf to be created on the basis of power or position, and ensuring there was an inclusive, supportive environment for all participants.

The group process also played an important part in the building of confidence. As a group, participants were encouraged to share concerns and thus began to realise they were not unique.

*At the start, some groups couldn't see what they had in common with other groups. But you could see it later on. What does a church group have in common with a youth organisation? In terms of running the organisation, it's the same issues.*

Trainees' comments

Trainees came to appreciate that their organisations may be no less fragile than other 'more established' organisations. In time, a point was reached where participants were willingly sharing experiences and giving advice on specific situations or problems. This further reinforced the process of confidence boosting through peers.

Most marked in terms of visible evidence of confidence growing were changes in the people skills and verbal skills of the participant trainees. The starting point for this was the attention paid in the class-based sessions by the trainers to mediating the participation of all trainees, taking full account the various barriers or difficulties that needed to be managed to secure people's full involvement. In the context of the wide diversity of organisations and individuals involved, the creation of a comfortable, 'contributing' environment was critical to

securing the participation of people who might have experienced exclusion in other settings.

*I thought it would be a 'dominatory' class like university. But it was participatory. Everyone was involved. I never felt any sense of discrimination or being left out.*

Trainees' comments

Reducing fear around certain other key subjects was also important for confidence building and creating momentum. Confidence in expressing ideas in writing, confidence with figures and with financial information, understanding certain abstract concepts (such as risk) were all important here, and triggered more clarity around the purpose of conversations (in terms for example of understanding what lies behind a question, knowing what the questioner wants to know, and becoming clearer about whether they have then been told what they need to know).

## Infrastructure

- ***The mentoring and e-mentoring component of the programme***

The mentoring and e-mentoring arrangements within the programme have played a dual role. First, they have created a

framework through which trainees could potentially anchor and further develop the skills and learning they were developing through the programme. Second, and most importantly in terms of the scope the project provided for developing local infrastructure to support the voluntary sector and voluntary activity, they offered an opportunity to develop pre-existing links between St Katharine & Shadwell Trust and some of their major local employers and supporters.

The mentoring element of the programme makes *The Trust Project* quite distinctive as a capacity building training initiative. The project called for volunteer mentors to work on a one-to-one basis with individual trainees. While e-mentors focussed on electronic communication skills, and the relationships with trainees were therefore conducted electronically, the 'in person' mentoring was potentially more wide ranging, as the relationship between mentor and 'mentee' developed. Typically, the support given by the mentor ranged from getting to know the nature of the trainee's work and being a supportive partner in helping them to articulate this, to sign-posting in relation to thinking about the trainee's project, to giving practical advice where this was appropriate and the trainee's project was at a stage where this fitted.

Mentors were briefed, trained and supported by the Trust and some coordination was also provided by News International staff.

It is clear that for the mentors and e-mentors working for the first time with a project like *The Trust Project*, a number of issues were raised. These can be summarised as follows:

- Becoming familiar with the voluntary sector environment at a 'grass-roots' level: although some of the mentoring volunteers had voluntary sector experience, few had engaged at this level with the 'nuts and bolts' of the volunteering life of grassroots organisation volunteers. This created a range of different sorts of concerns among the mentoring volunteers.

*At times I felt my trainee knew more about her project than I did – my knowledge of her world was limited – I didn't know that world. I hoped I'd be able to contribute – I'm not sure whether this happened or not.*

*I didn't know what to expect, but I felt I had an open-minded attitude to getting involved. My trainee started off really enthusiastic, engaged with the project. Then I got disappointed – I found the business of not getting feedback on action points we'd agreed disappointing. I wasn't sure about their commitment; wanted to know how the other mentors were getting on...*

Mentors' comments

- The requirement for good links into the project: some mentors participated in some of the training sessions and were able to build strong links therefore with the overall 'architecture' of the project, and others established relationships with their trainees which are likely to outlast *The Trust Project*. It is clear that the building of these sorts of linkages, on top of the induction and training of the mentors, did much to both feed individual motivation and also to link mentors to the wider framework and goals of the project. The issue of building the mentoring element more firmly into the programme, and in particular to the training programme is an area that could usefully be developed.
- Learning from the experience of the mentors and e-mentors from the perspective on onward development of the model: mentors and e-mentors made positive developmental suggestions in relation to the mentoring role and how it might be used and managed in future. The key points mentioned were a desire to be more closely informed and linked to the training programme (so that mentoring activity could cohere with this in a meaningful way for the trainees), a desire for more peer contact (so that the mentoring experience could be compared and discussed with other mentors during the project), and a desire to know more about the 'mentees' and

their projects (so that more thinking could be given in advance to thinking about what sort of support might be of help to them).

- ***Structure, coordination and replicability***

One of the aims for *The Trust Project* was that through the pilot run, the scope for replicating the model elsewhere would be explored. A number of factors have emerged as critical success factors for the pilot project, which would need to be taken into consideration in this context. These are as follows:

- Local issues: *The Trust Project* was well supported by the local authority and its voluntary sector team. In addition, the uniqueness of the Tower Hamlets context, particularly its cultural and ethnic diversity, has been reflected in the project and demonstrates that the model is capable of operating in this setting.
- Relationship issues: St Katharine & Shadwell Trust were already working through a weave of local relationships with voluntary and community groups at the grassroots end of the sector. This meant that the target groups, and those volunteers who might benefit most from the training, were either known, or could relatively easily be located. There was in effect detailed knowledge of 'the field'.

- Wider support: Once again, St Katharine & Shadwell Trust had pre-existing relationships with major local employers and supporters of their work. This meant that opportunities already existed for developing a volunteering regime to support the mentoring and e-mentoring element of the training. A willingness for this level of local collaboration already existed.
- Administrative flexibility: Yet again, another aspect of St Katharine & Shadwell Trust's contribution to the project was in terms of organisational and administrative flexibility. The project involved intensive coordination throughout, and the Trust was able to flex and move administrative resources and people around to be able to accommodate this. The project was given a high priority.
- Trainers with a local connection: It was important that the trainers working on the project had strong local knowledge and were able to demonstrate this in a sustained and supportive way to the trainees. This meant that trust was easily established through a shared experience of the local voluntary sector and the difficulties that the trainees faced in their organisations.
- Flexibility within the training programme: Just as the trainees participating in the programme came with a

wide range of organisational, life and personal experience, so it was important for the trainers to be able to receive and support the learning needs of the diverse group of individuals. This was not a one-off event, but required on-going adaptability and flexibility as a matter of training style throughout the programme. This played a critical part in ensuring that trainees remained engaged and supported in their learning.

A number of operational issues also highlight the need within this model for intensive administrative support, a function which is vital to the success of the model. These include:

- Retention and motivation: because of the nature of the grassroots organisations represented through the trainees, participation in the training sessions risked being affected by relatively minor crises. The risk of absence or lateness because of a trainee being called upon by their organisation, or having to juggle life commitments needs ongoing management.
- Trainees' goals and motivations: once again, because of the nature of the grassroots organisations involved, trainees were often not very clear early on about their personal goals, or those of their organisations. While these began to take shape and become better articulated through the training, it

meant that at the start of the training, there was a certain difficulty in pinning down a project focus for each to work on, and accordingly, a need for groundwork which could not necessarily be anticipated in advance.

- Time for integration: trainee learning was scheduled across 5 training sessions from November to March, with activities and mentoring contact in between. The framework provided opportunities for trainees to apply their learning and new skills. However, the need for the trainers to tackle groundwork, to address diversity within the group, and to create a positive learning environment, likewise the possibility of building mentors more centrally into the programme, leads to the conclusion that the programme might more effectively be delivered over 8 sessions. This would create space for more reflective and integrative work for trainees and other stakeholders alike.

## **Momentum**

The voluntary and grassroots organisations whose representatives formed the training group for this pilot project have derived a great boost through their involvement. Longer term prospects and impacts are difficult to assess at this stage. Favourable conditions

for forward momentum are however clear to see. The main aspects of this are discussed in turn.

- ***Early organisational and stakeholder benefits***

In the first instance, the project will mean that more local grassroots organisations' projects are likely to be 'fundable'. This is the direct result of the application of learning gained through participation in the learning elements of the project. Individual organisations are already showing more confidence in expressing their interests, profiling their work, and articulating their needs. As a result of practicing some simple networking during the course, they are building simple connections and as a result are less isolated, both in terms of how they view their own position, and in terms of the level of information and understanding that exists externally about their missions.

Trainees cited the following as among the principal organisational benefits that stood out for them:

- Improved understanding of the problems [my] organisation is facing and how to resolve them;
- Improved organisational capacity as the result of having access to someone with some training;
- Flexibility around communication where this involves different audiences;

- Articulating projects more effectively; and
- A clearer understanding of how to work more closely with users.

Among the wider network of stakeholders, there are potentially large longer term benefits, for example in terms of the relationships between local authorities and 'less sustainable' voluntary and community groups, or between private sector interests and their involvement in the local voluntary sector infrastructure. At present, the pilot project has provided a model for building these relationships. Put in the context of the overall project, the effectiveness of these links at present is difficult to assess. Support for grassroots-type voluntary organisations needs to happen at the right point in their development if there are to be real organisational gains, that help them for example to become more sustainable, or access grant funding to support their activities. Helping them through this tipping point through training and advice given and received 'at the right time' enables them to begin modelling good organisational practice, participate more effectively in the local community and voluntary sector infrastructure, and to make effective use of signposting and advice.

As *The Trust Project* is essentially concerned with building the capacity of individuals through training, the extent to which there has been a direct cascade of learning back into the trainees' organisations is difficult to assess at present. The programme did not incorporate the organisations into the

training partnership (for example through an aspect of mentoring). The trainees' own experience however suggests a degree of cascade, of both an organisational and a local nature. Its effectiveness depends on how central the trainee is to the mission of the organisation: for example, where they 'are' the organisation, there is likely to be a clear impact on the organisation's work. Elsewhere, the process will depend on how central the trainee is to the organisation.

- ***Collaboration and coordination***

On a basic level, the project has supported forward momentum by getting people to 'practice' working together within a supportive framework, focussing in on the skills and knowledge that this entails, encouraging people to wider out their skills, and also to apply them in a wider setting.

As confidence levels have risen, so this has been fed by more self-awareness and recognition of skills and strengths, and increased ease with seeking help. Specifically for example, the trainees and their organisations could be seen as mainly internally references, with any external links simply operating as an extension of the internal order. At the start of the programme, trainees were not confident at engaging appropriately with external organisations and individuals as they had little experience of networking. This limitation was in part unlocked by the use of the mentoring relationships, which have been important in building self- and organisational esteem.

*As I got more confident in myself, I felt better about meeting professionals. It was a powerful experience. With sharing, you pick up lots of good ideas from other organisations.*

Trainees' comments

Trainees have emerged from the programme more knowledgeable and sympathetic where the issue of forming links is concerned, whether these are horizontal, with peers for example, or vertical, with sponsoring of funding organisations. There is equally more of an understanding of how these relationships work, and a corresponding appreciation of how their own organisation fits into the picture.

There has therefore been a basic change in the disposition of the participant trainees towards the issue of collaborative working. They have become more willing to do this, more confident about researching and looking out appropriate links, and in approaching others for advice. There is also evidence of informal support being offered between trainees outside of the training setting, as well as the probability that some of the mentoring relationships may continue for some time beyond the life of the project.

- ***Influence and representation***

The change in attitude towards collaboration is likely to mean that in time the organisations represented among the trainees will have a stronger voice within local voluntary sector forums and groupings. Indeed there was a strong sense among trainees that this started with them: that they now felt better equipped to represent their organisations and put their position across. There was also a growing awareness of what might be at stake in the work that they do.

*I have proved to myself that I have the skills to do this and to represent my organisation in front of different people. I still have a lot to learn, but I know now that if my application for funding [on behalf of my organisation] gets approved, it is going to be a visible signal that you can be successful. And that the training has worked...*

Trainees' comments

Where collaborative working and representation in local groups is already happening, with attitudes such as this, they stand to be considerably strengthened.

There are also clear indications that participant trainees are already thinking beyond their current projects, and that they are taking more of a strategic view about what is coming next. This suggests a growing awareness of the need for discriminating judgement in relation to future projects, where

there is a conscious process of weighing up the various benefits of participation in different forums in order to decide what is going to be most helpful.

With growing awareness of other voluntary and community organisations and their interests, trainees and their organisations have improved their understanding of where they are located within the local landscape, and of what the voluntary sector represents locally. There is also more understanding of the various organisational models and types that operate in the sector.

Building of this basic foundation, there is scope for the development of appropriate networking practice which could in time lead to the creation of more robust local relationships which give greater voice to those organisations whose representatives have participated in the training programme and the issues that are pursued through their organisations' missions.

## 4. Conclusion: lessons and prospects

### Lessons

The following issues arose from the pilot project:

- **Diversity:** This particular group of trainees made for a very diverse learning environment, with a wide range of specific learning needs. The group composition was diverse in terms of work experience, social and cultural orientation, education and qualifications, language ability and first languages, and classroom experience and ability to operate in a 'classroom setting'. The result of this was that the trainers in particular needed to continuously review the way in which the classroom experience was unfolding, and make structural adjustments to accommodate and pace the workshops. This involved not only modifying content, but also group management activity (e.g. working to re-engage individuals who dis-engaged from an activity or whose pace was different to the group at the time). The effective orchestration of the learning process in this way has been critical to the success of the training programme.
- **Management and linkages:** The anchoring and management of the programme has also emerged as a critical success factor for the project. The Trust's staff have played a cross-linking role in this respect, liaising with mentors and e-mentors, keeping contact with the trainees, and coordinating project group meetings. A role was also

identified for them in delivering the training programme, as facilitators of the reflective learning sessions in the monthly workshops. In this respect they have been responsible for the overall coordination of the partnership aspects of the project, including ensuring that the various components and roles all fit together. However, a key point about the staff role is that it has straddled both the training programme and the project management role, and in this respect can be said to represent an 'engaged' model of project management.

- **Support for more fragile organisations:** The focus on supporting organisations which are smaller and more fragile engages with a particular capacity building need in the sector. The training programme's wider benefits in terms of bringing together representatives of organisations who would otherwise be unlikely to meet have the potential to raise awareness considerably, as organisations begin to understand that their operational problems are shared by others.
- **Mentoring:** The incorporation of a mentoring programme, including e-mentoring, to support and help with the integration of learning is a distinctive feature of this programme. The individual link with a mentor has been important not only in terms of the supportive and advisory role that they are asked to fulfil, but also in terms of the developing trainees' personal confidence in conducting a relationship with a professional from outside of their field.

At the same time, the mentoring programme has another by-product: that of stimulating interest in volunteering and in the voluntary sector within the business communities targeted. Accordingly, the briefing and ongoing support for mentors must be seen not only in terms of their advisory relationship with their trainee, but also in terms of building their engagement with the voluntary sector in general.

- **Longer term outcomes of the training:** It is too early to tell whether the training programme will result in more small voluntary and community groups in Tower Hamlets gaining access to funding by virtue of their improved communication and presentational skills. The prospects however appear positive. By the end of the programme, trainees were demonstrating more flexibility in their communication skills, they had gained experience of operating within a wider professional network (through mentoring and visiting each other's organisations), and they had developed understanding of specific skills areas, particularly financial planning. By-products of being on the training programme included a greater awareness of other organisations operating in their fields, more willingness to network with others on simple issues of common interest, more willingness to look outside their organisations for help or answers to queries, and also a range of personal skills development (e.g. listening and relating, using IT, time planning and prioritisation).

A number of areas for possible review are also suggested by the pilot run of the programme. These include:

- Gathering profiling and project information from organisations in advance of the training programme, so that training needs can be assessed in advance, and mentors and e-mentors can be briefed;
- Linking the mentoring component more closely into the programme, so that mentors are aware of the training content and the milestones their trainees can be anticipated to have reached;
- Consideration of the scope for matching mentor skills with the requirements of the organisational projects brought to the training programme by the participants;
- Accommodating diversity and the need to pace the training programme by extending the workshops to an 8-session programme;
- Reviewing the boundary between administration and supervision, from the point of view of strengthening the management of the supervision between sessions, while also ensuring that key relationships between the partners are also supported.

## Prospects

*The Trust Project* creates prospects for small, locally based community and voluntary organisations to begin to operate more strategically, not only by improving the way in which they communicate in relation to their present projects, but also by encouraging forward thinking beyond this. The range of benefits could potentially go far wider than this in the longer term.

By the end of the pilot project, where the trainees' organisations are concerned, at least two organisations were poised to submit funding applications to support their work, with others likely to follow suit fairly quickly. For the individuals concerned, some trainees had built relationships with their mentors which are likely to outlast the project. Others had taken their work back into their organisations and this was having a positive impact on working relationships, for example in dividing work up between people. For others, the experience had resulted in a re-evaluation of their career aspirations. Overall, increased confidence in expression, representing the organisation, articulating needs, clearly profiling projects and missions, and reduced isolation have all flowed from the training programme.

For St Katharine & Shadwell Trust, contact with the programme has also had staff development benefits, while it has also been possible to strengthen links with key sponsors and supporters, in particular with News International. For individual mentors, a link with the voluntary sector has been brokered and supported, leaving the potential for an interest to be further developed in future.

The Trust hopes to be able to replicate the training model more widely, and a Toolkit which will support this is being prepared by the trainers.

A number of factors will be important in assessing the feasibility of replication. These include:

- First, consideration of the local context. Here, a pre-existing relationship between News International and the Trust has been helpful to the process of identifying mentors, and in finding a location for the training. Tower Hamlets' diversity and the nature of the voluntary sector there have brought a rich diversity to the training group.
- Second, the Trust's steering of the project and involvement in its delivery has meant that the administrative requirements have been well covered.
- Third, the availability of trainers who understand both the geographical area and the fine-grain mechanics of capacity building training work has been critical. Key issues here have been around flexibility and adaptability, and the opportunities offered by team teaching (in terms of one trainer being able to support a trainee temporarily while the other is able to continue with delivering content for example).

In conclusion, *The Trust Project* offers a distinctive model for building supportive voluntary and community infrastructure at local level

that is geared to the needs of smaller and less well established groups and organisations. Its emphasis on working with individuals to apply learning and thread knowledge through this process is particularly well adapted to people coming from a weak skills or knowledge base. The action learning stance makes the programme adaptable, something that has been essential given the diversity represented within the training group and the host borough as a whole.

In terms of bringing about change, *The Trust Project* has the potential to be a genuine catalyst.

## **APPENDIX: ORGANISATIONS AND INDIVIDUALS INVOLVED IN THE TRUST PROJECT**

- ***St Katharine & Shadwell Trust***
  - Jenny Dawes, Shubi Choudhury, Yussef Ali, Sheila Begum (direction and management of project; recruitment of trainees)
- ***Recruitment advice***
  - Hilary Hughes (LB Tower Hamlets), Barry Stoye (COF)
- ***Trainees***
  - Swalehin (Bijoy Youth, Bangladeshi youth group)
  - Nilette, Rita, Dave (Map Squad; disabled self-help group)
  - Karolina (SPLASH; South Poplar and Limehouse Action for Secure Housing and the Environment)
  - Steve, Kelvin (Providence Row; day centre and hostel for the homeless)
- Theresa (African Women's Welfare Association; African women's-led group)
- Sarah (Tower Hamlets Deanery; Christian faith group)
- Osman (HAWD; Somali community group)
- Adam (Somali Eye Media; media for the Somali community)
- ***Mentors***
  - Mentors
  - Kajel Patel, Chris Duncan, Chris Mitchell, Janine Green, Rose Marshall, Jessica Taplin, Sarah Lighton, Richard Sykes, Hugh Reilly (News International)
  - Syeda Khanom (Central Foundation Girls' School)

### Coordination of mentors

- Susie Donnelly, Jo Graham and David Howells (News International)

- **e-mentors**

- Louise Zekaria (Allen & Overy)
- Michael Garnett (Birkbeck University)
- Kate Armstrong ( Central Foundation Girl's School)
- Zac Brech, Rob Thomas, Joanna Thorp, Rebecca Self, Mimi Kufour, Ruhool Ameen, Bob Myers (Crédit Suisse)
- Stacey Mulvanerty (Société Générale)

- **Trainers**

- Alice Bigelow, Ali Rusbridge (independent trainers)

- **Evaluators**

- Peter Grant, Barbara Reid (Cass Business School)