



# **A Report into the Current Strengths and Weaknesses of Services within Carers Federation and the Organisation's Capacity for Continued Growth**

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## **Introduction**

This report has been commissioned by Carers Federation. The vision of the organisation is to become “a leading voice for carer research and the provider of choice for commissioners of carer, information, advice and advocacy services by 2017.” The aims of the organisation are to “provide a tailored range of innovative services to carers, people for whom they care and the community; planned and developed in true partnership with our funders and the people we exist to support.”

The organisation is currently working in a climate of financial austerity, reduced funding and political change; there are significant challenges from external factors. In order to realise its vision and achieve its aims, the charity needs to capitalise on its strengths and develop an innovative approach to achieving financial stability.

In line with best practice in charity analysis, this report aims to evaluate the strengths and weaknesses of separate services within the Carers Federation and the organisation in general under the headings of:

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- Activities
- Results
- Leadership
- People and resources
- Finances
- Ambition

The report will also evaluate the organisation's capacity to achieve its objectives in the future based on the outcomes of the review. Finally, the report will offer a series of recommendations, linked into the outcomes of the review and designed to further develop the organisation's capacity to improve.

### **Methodology**

This enquiry uses a robust methodology:

- Questionnaires to representatives from the following groups:
  - Young carers
  - Adult carers
  - Partners and external agencies
  - Staff
  - Volunteers

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- Evidence from the organisation's own questionnaires for young carers.
- Interviews with:
  - The Chief Executive
  - A member of the SLT
  - Two representatives from the Board of Trustee
- Analysis of performance data
- Analysis of the Corporate Plan 2017 to 2020
- Scrutiny of the website

### **Activities and Resources**

This section of the report assesses the effectiveness of activities against three criteria:

- Focus on greatest need
- Range of activities
- Ability to adapt and innovate

### **Focus on greatest need:**

An effective organisation focuses its work where it can make the greatest difference to people's lives; in order to do this successfully, there needs to be a thorough understanding of the problem it is trying to tackle.





The evidence from this enquiry suggests that the Carers Federation demonstrates a strong commitment to listening to carer voice and ensuring that service provision and future growth is in alignment with carer need. Carers are represented on the Board of Trustees; regular questionnaires are carried out by all services to ensure continual access to carer voice; the results of these are included within the Quarterly Management Report. In addition to this, the monitoring of the social network provides an insight into carer need and current issues. Consultation exercises and workshops are carried out with specific groups with the aim of identifying specific needs and developing provision. Examples include a workshop organised for young carers in the 18 to 25 age bracket; a hard to reach or hidden group. Further to this, questionnaires returned from staff and volunteers indicate that the significant majority feel they are involved in decision making processes, suggesting that the views of frontline staff working directly with both adult and young carers are both sought and valued.

There is room to improve, however. Questionnaires returned from Partners and External Agencies working with the young carers service suggest that whilst some are involved in decision making processes, others are not.

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Leaders understand that making a difference to people's lives is complex and that there needs to be an emphasis on enabling a degree of self-sufficiency as well as offering direct support. Leaders articulate that there needs to be a focus on empowering carers and also on improving understanding within other sectors as part of this process. For example, the young carers service is currently working with schools to support young carers with respect to flexibility around homework and developing a broader understanding of the issues affecting young carers. The following case study provides an example of equipping an elderly adult carer with the skills to manage her own shopping.

In this case study, the Carers Federation supported an elderly Asian female carer who had rarely left her home. When her husband became seriously ill, she found she had to take care of things like shopping which she had never had to do before. The Carer Federation took her round supermarkets and explained how they worked. They explained offer such as 'buy one, get one free' to enable her to manage money and they supported her in getting her allowances sorted.

Leaders also understand that there is a lack of recognition for carers and that a significant amount of complaints with respect to health service treatment come from carers. The website provides links to the Independent Complaints Advocacy site, which includes a selection of downloadable guidance and forms.

### **Range of activities:**

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Activities need to be linked to the mission and objectives of the charity, there should be clear justification for the range of activities and there should be no gaps in the organisations' work that would stand in the way of it achieving its aims.

Evidence from the enquiry suggests that activities are linked to the mission and objectives in that there is a broad range available for both adult and young carers; likewise, activities are developed in alignment with carer need and voice. Activities for adult carers include:

- Opportunities to socialise
- Wellbeing provision e.g. yoga, pamper days
- Information and practical support
- Support groups
- Listening
- Themed workshops
- Counselling
- Advice

Activities for young carers include:

- Block courses such as archery and tennis
- Groups which provide opportunities to learn skills and knowledge such as dental hygiene

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- Trips and residential
- Training – e.g. first aid
- Emotional support

In addition to this, a focus on innovation and an ongoing focus on accessing carer voice means that activities are evolving.

The impact on both adult and young carers of the range and quality of the activities and support is evident. Young carers report how much they welcome the respite from their caring role and the opportunity to form friendships as this can be a challenge in their everyday life. Comments include “I’m able to meet other people and take a little time away from home” and “people bully you for it.” Further to this, comments offered by the young carers suggests that there is significant impact on well being. For example, one young carer stated that they “used to cry themselves to sleep every night” but now they felt “wonderful and confident.” Likewise, some adult carers reported significant stress and emotional strain due to the carer role with comments including “I have turned to drink”, “I have lost my rock” and “I can’t go far” because “I am worried my mum might kill herself.” The support provided by the service was cited as invaluable, with adult carers reporting increased ability to take care of their own needs as well as the person they are caring for; feeling more hopeful, feeling under less pressure and having more time

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for themselves. However, the feedback from both the young and adults carers questionnaires provides suggestions as to how the organisation could improve further. A common thread in the responses to the adult carers questionnaires related to having access to longer blocks of counselling and respite care. Adult carers at the younger end of the spectrum voiced a wish for more activities related to their age group whilst other comments related to more support being needed with financial management and developing own independence after the person being cared for has gone into a home or sheltered accommodation. Young carers identified different day trips and activities they would be interested in according to their interests; other feedback related to developing social media based activities and school based activities in order to promote awareness. Questionnaires outcomes relating to both services raised the fact that what the organisation is able to provide is not enough; there is a long wait for support in some cases and that other institutions such as health need to do more. These comments do not relate to the quality of provision by the Carers Federation.

**Ability to adapt and innovate:**

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Particularly in the current climate of austerity and political change, charities need to be able to adapt if they are to remain effective. Good charities have a track record of innovation and can demonstrate flexibility in response to change.

The Carers Federation is proud of its flair for innovation and creativity, and can cite numerous examples of innovation and adapting to meet challenges and changes within the social, political, local and financial climate as well as in response to carer voice. Examples include the creation of wallet sized cards for young carers for presentation at GP surgeries and medical centres; these outline the bearer's role as a carer and entitles them to receive diagnostic information on the person they are caring for as well as information regarding medication and prognosis. This innovation has received support from the local Clinical Commissioning Group. Other historical innovations include:

- Work undertaken in two local prisons
- The development of a clinic within the Carers Centre
- The design of the Young Carers App with self-assessment toolkits
- The development of the Carers Standard for employer and educational establishments.

There is also evidence to support the fact the organisation identifies opportunities to seek out hard to reach or 'hidden' groups and is

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innovative in the solutions it develops to meet their needs. The following case study illustrates how the organisation identified a particular group of carers, provided an opportunity for consultation and collaboration and developed a solution in response to their requirements.

The Carers Federation identified that 18 to 25 year old carers were a hard to reach group. A workshop was held for 30 carers within this group with a focus on identifying what they felt they wanted from the service. The metaphor of a funfair was used with rides representing different levels of support. The response from the group was they would like to buy an estate near the sea where they could all live close to each other because of the support this would offer.

At the heart of this was a clear need for systems that provided opportunities for peer to peer support. A secure social network was established which is monitored and kept up to date. It allows opportunities for young carers to support and engage with other initiates and seek support from the organisation as a whole whilst finding out information about activities, events and initiatives. Monitoring the social network provides the organisation with valuable insight into the changing needs and requirements of the carers using the network, allowing an opportunity to adapt and further develop services.

The use of social networking and technology continues to evolve. There is now an App specifically for Young Carers whilst adult carers can be signed onto the social network. Advice and training videos are available, including safe lifting and handling.

The organisation understands that it will need to continue to be innovative if it is to carry on being effective in realising its mission to meet the needs of all carers whilst delivering savings in line with the

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Efficiency Agenda. There is a recognition that innovation needs to link to becoming more commercially alert and business savvy in order to navigate through the challenges caused by reduced funding in light of the economic downturn. The 2016 – 2020 Corporate Plan states that the organisation will to “be better aware of commercial and business opportunities on offer from its own innovations” whilst a key priority is to develop commercial acumen to exploit innovations. An aim of the strategy is to “identify opportunities to make best use of existing assets” including selling “innovative products such as Apps and the Carers Standard.”

**Outcomes:**

**The organisation has a proven track record of innovation which, to date, has enabled it to provide a range of activities directed at carer need. Evidence points to the organisation meeting the needs of both young and adult carers in a variety of ways. The organisation has a good understanding of the problems they are dealing with through an excellent knowledge of the external environment, impacting factors and ongoing access of carer voice. The organisation is clear about how it needs to build on its capacity to innovate and link this with commercial acumen in order to continue to achieve its vision and aims in the future; this is evident in the Corporate Plan. Based on the evidence, the organisation has good capacity to improve.**

**That said, the evidence also suggests that the organisation could do more to reach a wider range of both adult and young carers. Feedback in the**

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questionnaires highlighted the fact that young carers especially found the service 'by accident' or 'chance'.

**Recommendations:**

**Develop strategies to reach carers in a wider geographical area**

**Develop strategies to engage hard to reach groups**

**Engage with partner voice and involve partners and external agencies in decision-making processes**

**Work with a wider range of organisations and institutions in order to raise overall awareness as to adult and young carer needs.**

**Results:**

Results refers to the changes an organisation makes to people's lives and the attitude it has to learning from its experience. The effectiveness of results can be measured against four criteria:

- Culture
- Evidence of positive results
- Quality of evidence
- Sharing results





The enquiry scrutinised Quarterly Management Reports and Annual Reports available through the website. Evidence of intangible results was drawn from the questionnaire outcomes.

The organisation collates data into Quarterly Management Reports; these are presented to the Board as part of effective monitoring processes. These provide some financial data, performance against KPIs and information about developments; there is also feedback from service users and partners. Feedback is positive and highlights increasing partnership work is taking place and that this is adding to the knowledge and understanding of paternoster. One social worker, for example, offered some very positive feedback on the young carers assessment:

**“I didn’t understand about the YC assessments initially when I received one from AYC. I spoke with a member of staff who explained what it was for, this then made me realise how well it had been written with very clear idea of needs identified by AYC. I was pleased the referral was password protected, it was easy to make a further assessment with the family due to information I received. I now have a greater understanding of Young Carers and why an assessment is needed.”**

**Social Worker**

The organisation has a degree of transparency in communicating results and outcomes. Annual reports for each service are available on

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the website; these provide an insight into the actions the service has taken and the impact of these.

Evidence of intangible positive results can also be found in questionnaire outcomes. Adult and young carers both discuss growth in confidence, improvement in wellbeing and improved social networks: comments refer to feeling 'more hopeful' and being able to now 'socialise', make friends and get to know people. Counselling is cited as having the most significant impact on wellbeing and is highly valued by carers.

There is evidence of Leaders benchmarking against competitors.

The enquiry did not find evidence to suggest front line staff are aware of results and how these link to priorities for development. However, this does not imply a lack within the organisation. Annual reports are a public document.

## **Leadership**

Leadership refers to how well the organisation is managed and governed, including whether it has a clear purpose and strategy for achieving its goals.

The effectiveness of leadership is measured against four criteria:

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- Management team
- Governance
- Vision and strategy
- Priorities

### **Management Team:**

The management team, led by the Chief Executive, runs the organisation, sets the overall tone and implements the strategy. Having a good leader and senior team, with a range of skills, is crucial to the success of the organisation.

The Chief Executive has been in post for five months; he was previously Deputy Chief Executive for eight years. He has a strong vision for the organisation, for the management team and for the staff, and he can articulate this well. He outlined the processes by which the organisation arrives at priorities, carrying out SWOT and PESTLE analyses, going back to basics, asking the question ‘where are we now?’ and defining ‘what we want to do,’ leading to the development of a three year corporate plan which then informs the individual service plans. He has embedded systems to identify and manage risk, and reduce paperwork.

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The Chief Executive has a clear insight into the challenges facing the organisation in terms of external pressures; he outlined working to reduce rigidity and increase adaptability within the service teams as part of a drive to develop innovation. The CE also reported greater depth in the extent to which service managers listen to their teams and arrive at a collective view. There is a good working relationship between the CE and the Board; he reports that they are comfortable challenging him through questioning and also outlined how they support him in his role. For example, there is a good relationship in place with the Chair.

Feedback from staff and volunteer questionnaires highlights manager support as a strength in relation to both services; many comments relate to support being readily available, the manager being 'always there' and will 'answer questions.' This was further supported by the Service Manager for the adult carer service, who outlined ways in which she offered support to staff.

Evidence from the enquiry supports the fact that leaders are aware of the challenges they face and the key priorities for their respective services. The Service Manager for the adult carer service outlined the aspects of work being done to build resilience and empower carers, reach hidden carers and build partnerships as part of a drive to increase

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reach. She also discussed the challenges of working with limited funding and maintaining staff morale.

### **Governance:**

Good governance is central to charity effectiveness. Trustees have the critical role of steering the direction of the organisation, supporting the management team to deliver on agreed aims and overseeing the financial and practical aspects of running the organisation.

Outcomes of the enquiry evidence the fact that Trustees have a clear understanding of their role and can discuss this in depth. They can articulate the priorities in the Corporate Plan, explain why they are priorities and the information they expect to be given as part of their monitoring role, namely Quarterly Management Reports, Chief Executive updates and progress against objectives. Trustees have a full awareness of the pressures and challenges facing the organisation but all were unanimous in expressing a commitment to the fact that ‘carers should not suffer.’ All Trustees understand the need for innovation and the need to be constantly asking “how do we get better and how do we persuade people we are better?”

When questioned about their understanding of the views of front line staff, the Trustee representatives reported that they support an open

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door policy, their emails are available and they are provided with the outcomes of staff surveys; they also referred to plans for a staff forum. However, some feedback from staff questionnaires suggested there is a lack of visibility from the Trustee.

Evidence from the enquiry suggests that the Board has the capacity to make tough decisions as part of working towards the realisation of the vision and aims; they engage in a full analysis of risk when reaching an agreement as the correct action to take. Trustees report being proactive in keeping up to date with legislation, scanning the website and liaising with other Boards. The Trustees interviewed were able to articulate how the Chief Executive is held to account.

**Outcomes:**

**The leadership has many strengths. The Chief Executive provides astute and decisive leadership, and is ambitious for the organisation. Leaders are committed to the vision and articulate this in their justifications for decision, actions taken and priorities for improvement; all leaders refer to the carers coming first, meeting the needs of carers, making sure they do not suffer and the fact that carers, in general, are a 'seldom heard' group.**

**All Leaders know the challenges they are facing and there is a drive to continue to develop innovation and adaptability in order to be future ready.**

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Leaders and managers in both the young and adult carer services value partnerships and feedback suggests, particularly in relation to the young carers service, that there is an open willingness to seek the views of partners and agencies in order to further develop provision; partners show through their questionnaire feedback that they value highly the work the young carers service does - referring to them as “passionate”, “brilliant”, “a great organisation to work with” and “always at the end of the phone.” However, this could be further developed. Some feedback also suggest that partners could be included to a greater extent in decision making processes.

Leaders at Board level demonstrate capacity to make difficult decisions; there is also an understanding of succession planning at organisational and Board level. Trustees have a good understanding of the skills and experience amongst them; they know which skills to look for when recruiting new members. Questionnaires returned from Board members provide suggestions as to how the organisation could reach people as potential Trustee, such as making links with Local Authorities and targeting people attending retirement seminars.

**Recommendations:**

**Improve systems for staff, including front line staff, to work in closer partnership with the Trustee**

**Continue to develop adaptability within each service**





## **People and Resources:**

People and resources include the organisation's staff, other resources, external support and how it uses them. The effectiveness of people and resources is assessed against four criteria:

- Staff
- Use of volunteers
- Other resources (IT, property and brand)
- External leverage

### **Staff:**

Staff are the greatest asset an organisation has, and highly committed, high quality, motivated and well trained staff are central to success.

Of the questionnaires returned by staff as part of this review, the significant majority reported feeling very motivated or motivated by their role; likewise, 88% felt the quality of support they were given as part of their role was excellent or good. Comments referred to good support from management, peer support, access to counselling and emotional support when dealing with distressing cases and being able to seek advice or guidance from colleagues and line managers. This pattern was reflective across all services. However, where there was a lack of

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motivation, comments outlined a lack of visibility from Trustees, difficulties in making suggestions because of a feeling of confrontation, and feeling isolated within the service. One person referred to being motivated by “wanting positive outcomes for the young people and families we support” but felt the lack of development opportunities and recognition within the role was demotivating.

Responses with regards to the quality of the Induction process varied. Newer members of staff were more likely to rate this as excellent or good whereas longer serving members of staff were more likely to rate this as average. Staff inducted into the adult carers service were more likely to rate the induction process as excellent, accounting for 75% of the ratings in this category. Positive feedback outlined thorough explanations of the role, opportunities to shadow and engagement in carers groups. Conversely, negative feedback referred to being “left to get on with the job” too quickly.

The biggest variance in response was related to training: 11% rated the quality of training as excellent; 46% as good, 24% as average and 11% as poor. The rest were unsure. However, despite the diversity in rating, there was an overall consensus that the quality of training could be significantly improved by being more specific, linked into appraisals and targeted to individual need. Comments included:

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“Appraisals can sometimes feel like a box ticking exercise.”

“ask workforce what skills they would like to improve in and provide training”

‘there is no specific young carer training’

We need “more CPD and a core training plan”

Likewise, feedback referred to improving supervision by including more structure and providing more detailed feedback.

There is evidence to suggest the organisation is proactive in providing training for managers. The adult and young carers service managers are both taking ILM accredited leadership qualifications.

The significant majority of staff felt they were involved in decision making processes by the SLT and that they were kept up to date with priorities for development. This was consistent across all services. However, one responder reported feeling isolated and undervalued within the young carers service and attributed this to the fact the service dealt with children rather than adults. The responder felt that improved opportunities for the services to share successes as a whole would help to address this.

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Two questionnaires indicated that the responder had skills sets or qualifications that were not being utilised by the organisation; they both stated that they felt a degree of frustration with this and would welcome the opportunity use their skills in order to meet carer needs.

Leaders recognise that not all staff buy into the vision and purpose of the organisation; work is underway to rebrand and establish a common understanding as to what the organisation is about and why it exists. Leaders report that appraisals and supervision pick up attitudes as well as development needs and support. Leaders reports that Induction training includes standard items and bespoke material related to interview outcomes.

### **Use of volunteers**

Volunteers are a valuable part of a charity's work. Committing adequate resources and training to volunteers along with ensuring they know what is required of them plays a role in ensuring the quality of service. There needs to be clear systems in place for managing and supporting volunteers.

Volunteers currently carry out counselling roles, mentor roles and hold places of the Board of Trustee. Counsellors are recruited from university and the work is linked to their qualifications; anyone wishing to

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take on the role of volunteer counsellor goes through a formal interview and application process, and an Induction programme. They are managed by a paid member of staff.

Questionnaires were returned from volunteer counsellors and members of the board of Trustees. 100% of respondents rated the quality of the Induction process, the quality of training and the quality of support as excellent or good. Comments related to the manager being helpful, supportive and always available; “feeling very valued” and having “access to training that was regular, relevant and useful to us.” Volunteers also provided feedback on how the service could improve further. Several volunteer counsellors referred to the need for clinical supervision whilst board members highlighted options for succession planning, including engaging with Local Authorities and Business retirement seminars in order to recruit new volunteers with a broad range of skills and experience to bring to the Board.

Evidence collated as part of this enquiry suggests the counselling service is highly valued by both staff and carers. One comment in the staff questionnaire referred to the positive impact of having access to counselling whilst comments included in questionnaires returned by many adult carers identified counselling as a positive source of support. Comments included:

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“I have had counselling before but this time it is really helping me.”

“Carla was a great help. I appreciated the counselling I received.”

“My counsellor listens and gives me the space to talk through my feelings – good and bad. This really helps as I don’t feel judged and I feel supported.”

“was sceptical about counselling but was made to feel comfortable.”

**Resources (IT, property, brand):**

Alongside staff and volunteers, organisations have a range of non-financial assets, such as property, land and computer equipment. Organisations should also have a website to communicate their activities and impact.

The organisation has a well-developed and highly informative website. There is easy access to range of services, training, information about the service, key personnel, performance data in the form of annual reports and future plans under each service. There are also invitations to shape the future of the work of other services such as the work being done by the Mid-Nottinghamshire cancer service. Referral forms are available under the Adult Carers tab along with other downloadable information leaflets. The Young Carers tab is organised into different sections according to the age of the child and provides a range of

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information about activities and events. There is an easily accessible link to the Independent Complaints Advocacy. The structure, layout and presentation of the website in general and each service is relevant to the services users and takes the needs of stakeholders into account.

The website provides a good insight into the activities of the organisation and the impact of these. Questionnaires returned by volunteers indicated confident understanding and use of the website. For example, most volunteers understand how to use the website to access information about the application process and what would be expected of them in the role.

Questionnaires returned by adult carers showed that the website has been useful in enabling them to:

- Access help or support
- Understand the assessment process
- Know who to contact in a crisis
- Know more information groups and activities to become involved with
- Understand the different types of help available

However, more than 50% of the questionnaires returned stated that the responder had not accessed the website or did not have

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access to a computer or the internet. This pattern was mainly reflected in the responses from the young carers. Those that had used the website found it useful in understanding how to access support and information about different groups or workshops/events they could attend; however, 40% had not accessed the website.

### **External Leverage:**

Leverage refers to a charity's ability to use their resources to bring in more support from external sources. Leverage depends on relationships that people in the organisation have, and their ability to spot opportunities.

The organisation can provide evidence of using resources to bring in support from other external sources. An example of this is the following case study relating to the development of the mentoring service.

The mentoring service sprang out of lottery funding. The first idea was to target young carers in the 16+age range and provide support around significant transitions and the focus was on education. A recruitment process was initiated and prospective mentors engaged in a ten week training programme. However, once the programme started, it was found that the needs were very different and the programme was adapted.

The organisation has historically hired out mentors to other projects including work around teen pregnancies; there has also been significant work with local prisons. This form of collaborative work brings access to a broader range of services and

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support avenues which the organisation can draw on to meet the needs of young and adult carers.

The charity can also provide evidence of working effectively with partners in order to gain knowledge, and to identify and reach a wider range of carers. Questionnaires returned from Partners and External Agencies, who work primarily with the young carers service, indicated that it is open to seeking opportunities. Comments included the fact that the service is “open to new ideas to help them get into schools” and to “identify and support more carers.” Another responder referred to the fact the organisation had worked with her to gain from her skills and knowledge base.

Feedback from Partners and External Agencies also suggested possible improvements. These included:

- Termly updates on session attended or activities offered or accessed by young carers
- Newsletter on developments or changes to the service
- Advertising – not many people are aware that the support is available.

Overall, feedback was overwhelmingly positive with many comments pointing to the passion, dedication and friendliness of the team as well as the effectiveness in meeting needs of young carers and range and





quality of support. All respondents found the service very easy or easy to communicate with. However, there was a variance in the depth to which partners felt involved in decision making, knew the vision of the service or understood priorities for development. Greater involvement at this level could result in further developing the range and quality of service provision as well as enabling a greater reach through capitalising on the networks and experience of various Partners and Agencies.

Looking to the future, the charity has a thorough understanding of the current challenges it is facing with the economic downturn, austerity and the political climate. A commitment to finding innovative solutions is clearly outlined in the Corporate Plan for 2016 – 2020. The plan outlines a strategy to transform thinking and commercial acumen in order to develop revenue streams from innovations. These include:

- Identifying opportunities to make the best use of existing assets. Sell innovative products such as the App and the Carer's Standard.
- Develop a range of partnership opportunities with commercial and voluntary and community sector bodies to increase income and financial surplus.

**Outcomes summary:**

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Overall, staff morale is good, motivation is high and staff report that access to support from management as well as from peers is a strength. The charity appears to invest in developing and retaining staff. Induction processes appear to be improving over time; however, there is work to be done in improving the quality and nature of training for staff working within all services as well as within the admin team. Likewise, increasing collaborative working between services and reducing silo working has the potential to further improve motivation by sharing successes and developing knowledge of what each service is doing.

The evidence suggests that volunteers are well managed and value their role; equally, they are valued by the organisation. The recruitment and selection of volunteers appears to be rigorous and the quality of training and support is good.

The charity does have a well developed website; however, the evidence suggests this is not always utilised as effectively as it could be by both adult and young carers.

Work with Partners and External Agencies is highly valued and is resulting in increased capacity of the organisation to meet the needs of young carers. However, there is scope to further develop these relationships and therefore to reach a wider range of young carers

**Recommendations:**



**Review current training provision to include bespoke training plans and access to specific CPD and activities linked to specific processes, practices and areas of expertise.**

**Improve the quality of appraisals and supervision to include specific and developmental feedback on performance and a clear understanding of next steps.**

**Gain a greater insight into the skills, experience and expertise amongst staff and ensure there is more effectiveness in how these are used to meet the needs of carers.**

**Explore ways in which the website can be made more accessible to a wider range of carers including those that are hard to reach and those with limited or no access to technology. For example, access in medical centres, libraries and other public buildings.**

**Continue to develop innovate approaches to sharing the same information that is held on the website.**

**Communicate key information effectively to partner organisations and agencies, and involve them in decision making processes.**







## **Finances**

Finances refers to the money an organisation has and how it uses its money.

This enquiry did not scrutinise financial data or reports other than that included in Quarterly Management Reports. The impact of the current financial climate and the associated challenges is embedded in other sections of this report. In summary, interviews with Leaders and scrutiny of the Corporate Plan demonstrated the fact that Leaders know that if they are going to achieve their vision and aims, there is a need to innovate and build the commercial acumen of managers for each service; this is clearly spelled out in the Corporate Plan.

## **Ambition**

Ambition refers the organisation's goals and strategy, and the impact these are likely to have. Ambitious charities look to achieve long term change by setting realistic, achievable targets. Effectiveness is measured against four criteria:

- Potential to grow or replicate
- Potential to improve results

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- Potential to solve problems more widely
- Willingness to change

The organisation has a clear Corporate Plan, which has been developed in consultation, derived from a thorough analysis of the strengths, weaknesses, opportunities and threats, and linked to the vision, missions and aims. The Corporate Plan is based in a thorough understanding of the external climate, and the associated risks and challenges these present. Further to this, the Corporate Plan shows a strong commitment to linking business savviness and commercial acumen with innovation. The Corporate Plan provides evidence of the organisation's potential to improve results and build on its current strengths; likewise, it provides evidence of a willingness to adapt, change and become future ready.

## Conclusion

**This report has explored the strengths and weaknesses of services, which form part of the Carers Federation organisation under the categories of:**

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- **Activities**
- **Results**
- **Leadership**
- **People and Resources**
- **Finances**
- **Ambition**

**The report highlights recommendations throughout based on outcomes. The report has found that there are many strengths in terms of the organisation as a whole and with each service. Leadership is a strength at Board and Senior level; there is evidence to say it is a growing strength at manager level. Increasing levels of adaptability in each service is leading to an overall commitment to innovation, which is a key driver behind improvement planning. Feedback highlights communication with and support from managers is a strength; this is reflected in staff feedback, from volunteers and from partners. Both services demonstrate a commitment to reaching a wider range of carers, including those that are hidden. There is evidence of significant impact on carers with both services.**

**Moving forward, evidence from this enquiry suggests that the young carers service could benefit from developing Induction**

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**processes for new staff and from consulting in greater depth with partners. For example, providing opportunity for partners to engage in decision making processes and keeping them up to date with performance information such as the number of young carers who have taken part in specific activities or received a form of support. The adult carers service would benefit from developing partnerships in order to reach a wider range of carers and to also ensure better access to the service overall; this is based on feedback that it is difficult to access support or it can be a long wait for support. Both services have successes and opportunities to share best practice, and this should continue to be actively promoted. There was evidence to suggest that a silo mentality exists for some. However, there is also evidence to suggest that the different services are learning from each other. The manager for the adult carer service, for example, discussed adopting the young carer card providing consent for medical information to be disclosed. Closer partnerships between all services within the Carers Federation has the potential to further develop opportunities for innovation and professional learning.**

**Trustees provide challenge and support to senior leaders; they have the skills, knowledge and experience to interpret the current challenges and external factors, and ensure the organisation is**

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heading in the right direction. The trustees are proactive in keeping their knowledge up to date through scanning the website regularly, engaging with other Boards and taking part in training. Moving forward, Trustees would benefit from further developing their relationship with frontline staff. There are opportunities for staff to communicate with members of the Board; there are also plans in place for a staff forum. However, there is scope to improve the level of visibility amongst frontline staff.

Based on an evaluation of past successes, the impact of previous development actions, strategic future planning and the commitment to the vision and aims, along with a strong focus on innovation and developing commercial acumen, the organisation has good capacity to improve.

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