CRITICAL SUCCESS FACTORS OF VOLUNTARY AND COMMUNITY PROJECTS IN WORCESTERSHIRE

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EXECUTIVE SUMMARY

In March 2017 Data Orchard was commissioned by Worcestershire Voices to undertake research into the critical factors in making a voluntary and community project a success; and whether these can be replicated across Worcestershire.
The aims of the research were:

i. To identify as many projects as possible in Worcestershire which are in some sense unique or innovative in their approach or in their achievement (Long List).
ii. To evaluate their success as objectively as possible, and quantify and describe it. After this - in agreement with the Worcestershire Voices Chairman - to agree a short list of cases to be reviewed in more detail.
iii. To evaluate the potential of the short list for replication and its relevance to other groups or locations in Worcestershire.
iv. To determine a list of critical success factors to disseminate, with the aim of creating a blue-print which can be adapted to any community and used as a guide to assist organisations that are committed to serve them.

Key findings

- The survey to identify successful voluntary and community projects in Worcestershire yielded details of 15 projects, with a good range by project type and beneficiaries. Six were explored in more detail through interviews and seven people engaged in a workshop with a further three afterwards.
- For a voluntary and community sector project to be a success the critical factors are:
  - **passion and determination and energy of group/individuals**
  - **adequately resourced** (money, people, time). Both to setup initially, to establish and then to continue operating.
  - **flexible and adaptable approach to changing need and circumstances**
  - **evidence of impact on beneficiaries** to drive financial sustainability and marketing
  - **meeting a local need**
  - **utilising the right skills:** volunteers, employees or paid-for services
  - **working well with others** (trustees, funders, partners, volunteers, beneficiaries, networks)
  - **governance and compliance** (insurances, safety, managing risk)
- The critical success factors were considered by all to be mostly self-generated (i.e. within the organisation); with the exception of being **adequately resourced** where skills and funding can be found outside the group or project. It was also recognised there is a lot support and guidance available for **governance and compliance** but it still needs to be self-managed. **Utilising the right skills** can also be out-sourced.

- All the critical success factors were considered to be replicable - i.e. applicable to other contexts and locations.
- The idea that not all success factors may be 'critical' at all stages in a project's journey, was tested. In summary the success factors; **passion and determination** and **use the right skills** were considered to be needed from concept/idea stage onwards. The other factors were considered to be necessary from setup (getting up and running) onwards with **evidence of impact** only from establishment (1-2 years once setup) onwards.
- The recommendations were informed by discussions at the workshop on how this research could best be disseminated and used. They are:
  - Run workshops to disseminate these findings in different localities or with different types of organisations. To promote good practice and encourage replication to meet local need.
  - Develop the success criteria into a checklist. Organisations could use this as a prompt to review how they work and how they might change to improve. This could be accompanied by how they can seek help and support.
  - Create more opportunities for sharing knowledge, experience and resources within the sector in Worcestershire.

1. INTRODUCTION

This project was commissioned following discussions at the Worcestershire Voices "Sharing Our Strengths Conference" of 7th December 2016. There it was resolved that local communities would be fundamentally strengthened by local communal action if successful projects multiply. Voluntary groups across the county are tackling challenging problems and succeeding where others have failed or where no other resources are made available. New initiatives are encouraged by many funders and sometimes the hype or reports of success become exaggerated. So there was recognition that simply copying what others are doing or claiming every local project which receives voluntary or monetary support is a "success" will create a false picture and waste the scarce resources available, or demotivate staff and volunteers. Many schemes which are already franchised or packaged as "best practice" then go on to fail or barely succeed in different locations.

As a result Data Orchard CIC was commissioned by Worcestershire Voices to undertake research into the critical factors in making a voluntary and community project a success; and whether these can be replicated across Worcestershire.

2. Aims of research

i. To identify as many projects as possible in Worcestershire which are in some sense unique or innovative in their approach or in their achievement (Long List).
ii. To evaluate their success as objectively as possible, and quantify and describe it. After

this - in agreement with the Worcestershire Voices Chairman - to agree a short list of cases to be reviewed in more detail.

iii. To evaluate the potential of the short list for replication and its relevance to other groups or locations in Worcestershire.

iv. To determine a list of critical success factors to disseminate, with the aim of creating a blue-print which can be adapted to any community and used as a guide to assist organisations that are committed to serve them.

Research questions:

❖ What does a successful project look like? (quantify and describe)
❖ What makes a project a success? (critical success factors)
❖ How can these work elsewhere or in another situation (replicability)?

3. Methodology

3.1 Brief literature review

A brief literature review was conducted to assess whether other research existed into factors that make a voluntary project a success, using the sources below

❖ *10 things to think about when selecting interventions and organisations for replication;* The Tavistock Institute; 2015
❖ *Boldness in times of change: rethinking the charity sector for the future*; Murray, Shea & Wixley; 2016 (NPC's State of the Sector Programme)
❖ *Charities taking charge: transforming to face a changing world*; Murray, Shea & Hoare; 2017 (NPC State of the Sector Programme*)*
❖ *Measuring the Good Handbook;* Coalition for Efficiency and Volunteering Matters; 2016
❖ *The road ahead*; NCVO; 2016
❖ *Replicating successful voluntary sector projects*; Diana Leat; 2003
❖ *Worcestershire Volunteering;* Sian Basker; 2013

3.2 Online survey

Drawing on the list of key factors for success and the other critical factors already identified in the research brief, an online survey was designed to assess projects identified as successful in Worcestershire.

The purpose of the survey was to capture the effect these projects are having on their beneficiaries/clients, the wider community and their own organisation, alongside generic information about the projects (turnover, number of employees and volunteers, beneficiaries, geographical extent, funding, governance).

We used Worcestershire Voices mailing list of over 280 contacts as well as other networks[1] to identify successful projects in Worcestershire with links to an online survey (see Appendix A). The survey captured information about the project to assess possible reasons for success. It was live for four weeks over May and June 2017.

3.3 Interviews

Following the survey, semi-structured interviews of approximately an hour long were conducted with six projects from the online survey responses. They included: a project involving a social impact bond, one run by a social enterprise, and a community-run shop. They included newly created projects to those that have been established for many years; and a project with no volunteers to an entirely volunteer run project. The factors for success were explored in more detail using in-depth interviews in June, conducted either by telephone or face to face with semi-structured, open questions (see Appendix B). We used the results of the online survey to inform the questions asked, to probe further into some aspects.

3.4 Determination and testing of critical success factors

Following the online survey and interviews, the critical factors in making a successful voluntary and community project were drafted. These were then tested in a participatory workshop in early July 2017 in Worcester. All those who had participated in the online survey or interviews were invited to attend, as well as the Worcestershire Voices reference group. There were seven attendees with three further responses from those who couldn't attend, representing ten organisations in total.

A further iteration of the critical success factors was compiled after the workshop and sent to those who were not able to attend, but still wanted to provide feedback on the factors.

3.5 Snapshots of some projects

A set of six snapshots were outlined, to provide the basis for a dissemination programme of this research and elicit discussion.

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[1] Onside Advocacy, Young Solutions, Malvern Hills community awards, Worcestershire Volunteer awards

4. Results

4.1 What does success look like?

To identify successful voluntary and community projects in Worcestershire, the following aspects were used:

- considered innovative, revolutionary, and/or inspirational
- meeting a need
- getting positive feedback from beneficiaries
- financially viable

These aspects were used in a communication via e-mail to Worcestershire Voices networks asking for the identification of successful projects and to complete the online survey with details.

4.1.1 Draft factors for successful projects

From the literature review, some well evidenced features of successful projects were identified:

- ❖ Enthusiastic leadership
- ❖ Motivated volunteers
- ❖ Adequate finance
- ❖ Flexible approaches and adaptability to changing need or circumstances

Other aspects that are less commonly reported were:

- ❖ The relative significance of the project to the community [SEP]
- ❖ The nature of the sponsoring body or partnership [SEP]
- ❖ Availability of and dependency on professional input

These initial ideas were then developed iteratively and tested throughout the process using data collected in the three stages described previously.

4.2 Online survey

The survey to identify successful voluntary and community projects in Worcestershire yielded details of 15 projects, with a good range by project type and beneficiaries. More than one response was possible for some questions, denoted by a *. Here are the key findings:

4.2.1 Range of beneficiaries: socially isolated older people, children and families, and volunteers, local communities, audiences in rural communities, village halls, people affected by sexual violence, adults with Asperger's syndrome, families with gender questioning or trans children, people in debt.

4.2.2 Just under half of the projects have been running for 3 to 5 years.

4.2.3 Most projects had been personally championed

4.2.4 All the projects had been setup to meet a local need.

4.2.5 The geographical areas covered by the projects varied from the whole of Worcestershire to geographic communities and districts within the county to a wider area within the West Midlands region.

4.2.6 The leadership of the projects were all rated as very good or good.

4.2.7 All agreed that employees, volunteers, leaders and stakeholders were engaged with the project.

4.2.8 Most of the projects had been funded by grants, by donations, fund-raising activities or a combination of these. 10 out of the 15 said that the way the project was funded contributed to its success.

4.2.9 Nearly all the projects involved other organisations at some point.

4.2.10 All the projects were run by organisations with a constitution, mostly charities with some incorporated organisations (Community Interest Company, Limited company, Community Benefit Society).

4.2.11 Half the projects were affiliated or linked to another organisation (e.g. national/international or regional) and half are not.

4.2.12 The size of the organisations that run the projects was varied, as measured by annual income and the number of people working there. Size measured by annual

income varied from less than £5,000 to over £500,000. Size measured by the number of people who work there varied but most had under 10 employees and over 10 volunteers, see table below. This shows the number of projects by category of size in terms of employees or volunteers.

4.2.13 Aspects of success were outlined by respondents, in summary: meeting a local need, individual attention and tailored support and support, passion of volunteers, volunteers, simplicity of meeting a need, social return on investment.

4.2.14 All stated their projects were valued by the community or beneficiaries they serve. By meeting their needs as evidenced by feedback and use of service, recommending to family and friends, beneficiaries becoming volunteers themselves, financially viable.

4.3 Can the critical success factors be replicated?

The Tavistock Institute defined replication in the context of voluntary and community projects as follows:

"Replication means taking an existing intervention that has proven to work in one context and implementing it elsewhere, either with different target groups, in a different location, or in a new organisational setting." The Tavistock Institute, 2015

Replicability of each critical success factor was tested during and after the workshop. Each was considered replicable in a range of contexts and localities.

4.4 Critical success factors for voluntary & community projects in Worcestershire

The development of critical success factors evolved throughout this research during the collection and testing from the online survey, the interviews, the workshop and follow up. The iterative process is shown in Appendix D.

The final critical success factors for a voluntary and community sector project are:

- o **passion and determination and energy of group/individuals**
- o **adequately resourced** (money, people, time). Both to setup initially, to establish and then to continue operating.
- o **flexible and adaptable approach to changing need and circumstances**
- o **evidence of impact on beneficiaries (**to drive financial sustainability and marketing)
- o **meeting a local need**
- o **utilising the right skills:** volunteers, employees or paid-for services
- o **working well with others** (trustees, funders, partners, volunteers, beneficiaries, networks)
- o **governance and compliance** (insurances, safety, managing risk)

The following table shows gives further detail as to where these are generated (within the organisation or external) and some insight from respondents based on their experience.

Table1 Detail for each critical success factors

CRITICAL SUCCESS FACTORS	self-generated or externally sourced?	INSIGHT
passion, determination and energy of group/individuals	Self-generated but can be invigorated from outside if initial spark dims. Balance with practicality (realism & political reality).	Unique to the VCS? Most communities have a desire for improvement although passion/energy is more difficult to harness in more deprived communities. Important to have passion and determination of a group for sustainability. Probably too risky if it is completely driven by one individual. Important to share it so it becomes collective passion. Analogy of a spark becoming a fire. This will often vary within the group. People have to be able to give what they can and be recognised for their contribution.
adequately resourced (money, people, time): to establish and/or continue	Both. Must come from the community but skills and funding can be found outside the group or project.	Links to skills. Volunteers don't come free - they need coordination & support. Volunteer programme to include: job descriptions, recruitment & induction, supervision/evaluation, motivation, recognition. Sometimes for community projects, it's exchange or use of local facilities where no money changes hands.
flexible and adaptable approach to changing need and circumstances	Self-generated: if not flexible and only have a plan A, it will be a challenge to move forward if this get derailed.	Openness to change. Equally can't be over flexible; the project still needs to be aligned with the original community objectives: "a degree of perseverance in the face of detractors rather than flip flopping around to meet other's agendas is a good thing as well." External networks can generate new approaches. Ask questions in networking to make it more active rather than passive. Opposite approach to competition for scarce resources. Saying 'yes' and accepting help or corporate sponsors.
evidence of impact on beneficiaries (financial sustainability, marketing)	Has to be self-generated in the long-term but expertise can be sourced	Need this for accessing funding or reporting to funders (external) but also for own improvements.

CRITICAL SUCCESS FACTORS	self-generated or externally sourced?	INSIGHT
	from outside to help with this (training on monitoring and evaluation)	Important to engage beneficiaries too so they can see their progress and the service is changed to meet their needs. Not as relevant to small organisations e.g. youth clubs, and can put people off from coming back if too much information is asked for - just return visits is a useful indicator. Adds to the cost of a project. Can range from increased demand/need/attendance/engagement to beneficiaries no longer needing the service (success in some cases!). Hard to demonstrate the cost/benefit where beneficiaries are prevented from ending up in crisis or costing public services. Harder to evidence mental health, loneliness, well-being & confidence levels (softer measures).
meeting a local need	n/a	Local will vary, depending on the project – e.g. Bretforton could have a local need, but if the surrounding villages had the same need, a community group serving several local communities would still be meeting a local need. Depends what local means (e.g. does Air Ambulance and national charities meet a local need too)! Local need may well involve non-local people and/or actions. Also have to be clear as to the difference between 'need' and 'demand' - not the same thing.
utilising the right skills: whether volunteers, employees or paid-for service	Mostly self-generated, some can be out-sourced.	Business acumen essential: managing finances and business planning with clear goals. Board of trustees is key (finance, marketing, impact measurement). Maintaining a local profile is also important - media and social media - to attract funding and volunteers. Networks are key to accessing appropriate and trusted paid-for services. Need to share resources (particularly infrastructure such as office space) with more people pulling together to avoid competition e.g. joint applications to funders.

CRITICAL SUCCESS FACTORS	self-generated or externally sourced?	INSIGHT
		Infrastructure support is key here. For example, Worcs County Council's Changing Futures Fund was useful, but is not longer in operation and happened too soon for embryonic organisations to make best use of the expertise on offer.
working well with others (trustees, funders, partners, volunteers, beneficiaries, networks)	Mostly self-generated.	Leaders can feel lonely sometimes - actively seek out others. Answer is sometimes within. Volunteers enjoy networking too! Be careful who you partner up with (trust)
Governance & compliance (insurances, safety, managing risk)	Both, in that it needs to be self-managed but there is lots of available support and guidance.	If you don't have these aspects (often overlooked at the outset of a project) you can very quickly get into a mess. Covers physical safety, safeguarding & DBS checks, compliance with company and charity law etc. Essential that governance is built round models answerable to the local community - the structure of which can vary (community benefit society, community interest company, charity etc).

4.5 When factors become critical for a project's success

During the workshop we tested the idea that not all success factors may be 'critical' at all stages in the projects journey. Participants were asked at what stage they thought each of the factors were particularly 'critical' for a project. To find out if different advice/support is needed at different stages of the project. This could potentially inform a 'checklist' for when and where to access advice and support.

The following table summarises what the participants at the workshop thought, about the stage at which each critical success factor was relevant. In summary the success factors; *'passion and determination'* and *'use the rights skills'* were considered to be needed from concept/idea stage onwards. The other factors were considered to be needed from setup (getting up and running) onwards with *'evidence of impact'* only from establishment (1-2 years once setup) onwards.

- ❖ **Concept/idea stage**
- ❖ **Setup (getting up & running)**
- ❖ **Establishment (1-2 years once setup)**
- ❖ **Ongoing (2+ years)**

Table 2: Summary table of when factors become critical for a project's success

Note: the darker shading represents more affirmation and consensus from participants.

Success Factors	Concept	Setup	Established	Ongoing
Passion and determination				
Use the right skills				
Adequate Resources				
Flexible and adaptable				
Work well with others				
Meeting a need				
Good governance				
Evidence of impact on beneficiaries				

4.6 Snapshots of some projects

A snapshot of six projects is given here to give an overview of some successful projects in Worcestershire.

Reconnections project (Age UK Herefordshire & Worcestershire)

This project has leveraged funding using a social impact bond, to address loneliness in older people and prevent people getting into crisis. It is the first of its kind nationally and internationally. Social investors pay money upfront for service delivery and then Worcestershire County Council and the Clinical Commissioning Group pay for outcomes achieved by the project (payment by results). Referrals are from health professionals and others (including self-referral).

Features: Complex to negotiate, which took several years; with recent successful renewal of contract for another two years. The project has needed to be adaptable to significant levels of change, as it is untested territory. Excellent example of partnership working with social financiers engaged with the project; and criteria for eligibility negotiated and changed to meet beneficiaries' needs. Very robust evidence of impact required and obtained with support from London based academics. Beneficiaries often become volunteers for the project.

Shindig (Live & Local)

Well established project which supports over 30 voluntary organisations (mostly in rural communities) to choose, publicise and run quality arts performances in their own venues. Fosters community networks, capacity, self reliance, partnership working and sociability.

Features: Widely used and replicable model. Key to success lies with the ownership and volunteering by local communities who have access to a venue and who understand their own community. They are then matched to high quality performers subsidised by public funders. Cost effective between public funders, box office takings and volunteer energy and enthusiasm.

Bretforton Community Shop (Ltd)

Community owned shop in Bretforton in its third successful year of trading. Locally championed and run as a community benefit society with local shareholders. Grant funding used alongside the proceeds of a community share issue to setup, but now close to operational self-sufficiency financially. Greatly supported by the 70 volunteers who help in the shop (30 do so regularly). Obtaining the premises was the largest barrier to surmount with challenging timescales at the beginning of the project.

Features: Strong and determined local support from concept to establishment phase. Excellent use of local commercial expertise alongside external advice and support from the Plunkett Foundation and Worcestershire County Council. The leaders work really well with others with a key message of 'don't be afraid to ask for help and expertise'. They are open to change and improvement as evidenced by collaboration with a local housing association and new events based at the shop. They have also advised others on how to replicate this model elsewhere.

Signs of Hope CIC

Face to face holistic debt and budgeting advice that aims to help clients find hope. Reliant on funding contracts for free-to-client services who are who are referred from local authorities and housing associations. Overcame a significant barrier at setup phase when financial regulations changed affecting their ability to trade for 9 months. Also come up against expectations from funders that the voluntary and community sector should be either free or very cheap, which isn't realistic.

Features: Clear sense of purpose and distinctiveness as a social enterprise with no volunteers. Determination to keep going back to their vision and meeting people where they are at, in a place that they are comfortable in. Evidence is collected from clients about how they feel before and after support. Good communication with funders and referrers to maintain relationships to ensure financial sustainability.

Carer TalkTime (Worcestershire Association of Carers)

Funded hub for unpaid carers to get free help and advice. Carer TalkTime includes a befriending service (where volunteers phone carers for a friendly chat), helpline, carers groups, information and training sessions. The aim is to help carers feel less isolated, more supported and able to maintain their own well being alongside their caring role. The need was highlighted by the organisation's helpline work where more regular ongoing support for carers was identified.

Features: Enthusiastic and award-winning team of 30 staff working well with 100 volunteers. Most volunteers are ex-carers themselves and are well-supported and carefully matched to clients. Good relationship with Worcestershire County Council, Social Service and other carer and support groups, such as churches.

Heartstart Malvern

New project which provides free resuscitation training to the public and school children in Malvern, alongside placing defibrillators in the community. Aims to deliver training and defibrillators to be used by locals to improve survival rates when someone has a heart attack. Clearly defined issue and need articulated by the founder who is an ex-paramedic, following a successful resuscitation story reported in the local press. There have been 800 people trained so far over the last year, with positive feedback gained.

Features: Enthusiastic and committed volunteers with a clear focus. The project is simply run with very low running costs. Good use of local media to garner support for recruiting volunteers and donations for training equipment and defibrillators.

5. Recommendations

These recommendations were informed by discussions at the workshop on how this research could best be disseminated and used.

- ❖ Run workshops to disseminate these findings in different localities or with different types of organisations. To promote good practice and encourage replication to meet local need.

- ❖ Develop the success criteria into a checklist. Organisations could use this as a prompt to review how they work and how they might change to improve. This could be accompanied by how they can seek help and support.

- ❖ Create more opportunities for sharing knowledge, experience and resources within the sector in Worcestershire.

Appendix A: Online survey questions

1) What's the name of your charity/organisation? <free text box>
2) What is the name of the project? <free text box>
3) Please give a brief description of the project <free text box>
4) Who are the main beneficiaries of this project?
5) What geographical area does the project cover? <free text box>
6) **What do you think makes this project a success?** <free text box>
7) How long the project has been running: <1; 1-2 years; 3-5; 6-10; over 10 yrs
8) How did this project come about? (please tick one)
    a. personally championed by someone in your organisation
    b. replicated from elsewhere
    c. local community champion
9) Why was this project set up? (tick all that apply)
    a. meet local need
    b. personal experience
    c. collaboration with others
    d. asked to do it (e.g. by beneficiaries, national body)
    e. funding opportunity
10) How would you rate the leadership of this project?
    <very good/good/unsure/could do better/much improvement needed>
11) To what extent do you feel the following people are engaged with this project:
    a. Employees in this organisation are engaged with this project (<strongly agree; agree; neutral, disagree; strongly disagree>
    b. Volunteers in this organisation are engaged with this project (<strongly agree; agree; neutral, disagree; strongly disagree)
    c. Leaders in this organisation are engaged with this project (<strongly agree; agree; neutral, disagree; strongly disagree)
    d. Stakeholders in this organisation are engaged with this project (<strongly agree; agree; neutral, disagree; strongly disagree)
12) Do you feel your project is valued by the community it serves/beneficiaries? (please say why you think this) <open text>
13) How is this project funded?
    <grant funded; paid for service by beneficiaries; commissioned by another organisation; donations; fundraising activities within your organisation>
14) Do you feel the way the project is funded contributes to its success? <yes/no/maybe>
15) How involved are other organisations in this project?
    a. not at all
    b. involved at setup
    c. part of delivery
    d. referral routes
    e. signposting
    f. back office support e.g. payroll, office space
    g. funding

ABOUT YOUR ORGANISATION

16) What is your organisation's status? *tick all that apply* <community group with a constitution, community group without a constitution; registered charity; incorporated (please specify type) <free text box>

17) Is the organisation part of or a subsidiary of a larger organisation? (national /international/regional) <If yes, what; no>

18) How many people work for your organisation:
   a.   Number of employees: 1-5; 6-10; 11-20; 21-50; 51-99; 100-500; 500+
   b.   Number of volunteers: 1-5; 6-10; 11-20; 21-50; 51-99; 100-500; 500+

19) What is your organisation's annual income/turnover?
   <£5K; £5 to £10K; £11K - £20K; £21-£50K; £51K - £100K; £101K -£200K; £201-£499; £500K & over)

We may want to contact you to find out more about this project, so please provide your contact details here: (name of individual, e-mail, phone number)

Appendix B: Interview questions

a. **What do you think makes this project a success?**

b. **Explore drivers for setting it up in more detail (open question).**
   Probe whether it was a personal project, holistic community-led approach or policy/politically driven? Funder driven? Replicated from elsewhere?

c. **Explore barriers overcome to get the project up and running, how did you achieve it?**

d. **To what extent is your project dependent on funding or sponsoring organisation?**
   i.   Follow-up question: how much influence the funder/sponsor has?

   ii. Are there plans to be less dependent i.e. more financially sustainable?

e. **Do you have evidence that this project is valued by the community they serve/beneficiaries?**

f. **Explore collaboration with other organisations: who did you work with (and/or prepared to work with)? inclusive & open to others?**

g. **How useful were any professional, expert services and input (useful or not, your choice or not)**

h. **If you were starting it again now, what would you do differently?**

i. **Do you think this project could be replicated elsewhere?**

j. **Where will the project go from here?**

Appendix C: Online survey results

The survey to identify successful voluntary and community projects in Worcestershire yielded details of 15 projects, with a good range by project type and beneficiaries. More than one response was possible for some questions, denoted by a *. Here are the findings:

4.2.1 Range of beneficiaries: socially isolated older people, children and families, and volunteers, local communities, audiences in rural communities, village halls, people affected by sexual violence, adults with Asperger's syndrome, families with gender questioning or trans children, people in debt.

4.2.2 Just under half of the projects have been running for 3 to 5 years

Length of time project has been running	Number of projects
under 1 year	2
1-2 years	1
3-5 years	6
6-10 years	3
over 10 years	4

4.2.3 Most projects had been personally championed

How did this project come about?*	Number of projects
Personally championed by someone in your organisation	8
Replicated from elsewhere	3
local community champion+	5

+not necessarily someone from an organisation

4.2.4 All the projects had been setup to meet a local need.

Why was this setup?*	Number of projects
Meet local need	15
Personal experience	4
Collaboration with others	7
Asked to do it (e.g. by beneficiaries, national body)	2
Funding opportunity	3

4.2.5 The geographical areas covered by the projects varied from the whole of Worcestershire to geographic communities and districts with the county to a wider area within the region.

4.2.6 The leadership of the projects were all rated as very good or good.

How would you rate the leadership of this project?	Number of projects
very good	8
good	6
unsure	0
could do better	0
much improvement needed	0

4.2.7 All agreed that employees, volunteers, leaders and stakeholders were engaged with the project.

To what extent do you feel the following people are engaged with this project:	Employees	Volunteers	Leaders	Stakeholders
strongly agree	9	11	11	6
agree	4	4	2	5
neutral	0	0	2	1
disagree	0	0	0	0
strongly disagree	0	0	0	0
not applicable	2	1	0	1

4.2.8 Most of the projects had been funded by grants, by donations, fund-raising activities or a combination of these. 10 out of the 15 said that the way the project was funded contributed to its success.

How is the project funded?*	Number of projects
Grant funded	10
Paid for service by beneficiaries	4
Commissioned by another organisation	3
Donations	11
Fundraising activities within your organisation	11

4.2.9 Nearly all the projects involve other organisations at some point.

How involved are other organisations in this project?*	Number of projects
not at all	1
involved at setup	2
part of delivery	7
referral routes	5
signposting	9
funding	8

back office support e.g. payroll, office space	2
other	3

4.2.10 All the projects are run by organisation with a constitution, mostly charities with some incorporated organisations (CIC, Ltd company, CBS)*.

Organisational status*	Number of projects
community group with a constitution	2
community group without a constitution	0
registered charity	13
incorporated e.g. CIO, CIC, Ltd co.	3

4.2.11 Half the projects are affiliated or linked to another organisation (e.g. national/international or regional) and half are not.

4.2.12 The size of the organisations that run the projects was varied, as measured by annual income and the number of people working there. Size measured by annual income varied from less than £5,000 to over £500,000. Size measured by the number of people who work there varied but most had under 10 employees and over 10 volunteers, see table below. This shows the number of projects by category of size in terms of employees or volunteers.

Number of projects	0	1-5 people	6-10 people	11-20 people	21-50 people	51-99 people	100-500 people	500+ people
No. of employees	2	8	1	0	3	1	0	0
No. of volunteers	1	3	0	3	2	2	4	1

4.2.13 Aspects of success were outlined by respondents: meeting a local need, individual attention and tailored support and support, passion of volunteers, volunteers, simplicity of meeting a need, social return on investment.

4.2.14 All stated their projects were valued by the community or beneficiaries they serve. By meeting their needs as evidenced by feedback and use of service, recommending to family and friends, beneficiaries becoming volunteers themselves, financially viable.

Appendix D: Table of iterative process of determining critical success factors

Initial ideas to test	online survey	interview	draft factors tested at workshop	development of factors during & after the workshop
Driver for initial setup: internally generated, transferred what they perceived has worked elsewhere, explore fit vs stretch in interview, holistic community-led approach or policy/politically driven?	✓	✓	meeting a need	meeting a LOCAL need
Enthusiastic leadership	✓		passion & determination & energy of group/individual	passion & determination & energy of group/individual
Motivated staff: employed and voluntary	✓		passion & determination & energy of group/individual	passion & determination & energy of group/individual
Adequate finance	✓		adequate finance to establish and/or continue	adequately resourced (money, people, time): to establish and/or continue
Flexible approach and adaptable to changing need and circumstances		✓	flexible & adaptable approach to changing need and circumstances	flexible & adaptable approach to changing need and circumstances
Collaboration with other organisations: who did you work with (and/or prepared to work with)? inclusive & open to others?	✓	✓	working well with others (funders/partners/volunteers/ beneficiaries)	working well with others (trustees/ funders/partners/volunteers/ben eficiaries/networks)
Good community engagement (survey) and valued by the community they serve/beneficiaries (interview)	✓	✓	working well with others (funders/partners/volunteers/be neficiaries)	
Nature of relationship with sponsor, funder or partner?		✓	positive relationship with sponsor, funder or partner?	

Initial ideas to test	online survey	interview	draft factors tested at workshop	development of factors during & after the workshop
Use of professional, expert services and input (useful or not, your choice or not)	✓	✓	utilising the right skills: have in house, access elsewhere (pro bono or paid for)	utilising the right skills: whether volunteers, employees or paid-for services.(In small organisations it might be subconsciously done)
Evidence of impact on beneficiaries	✓	✓	evidence of impact on beneficiaries (financial sustainability, marketing)	evidence of impact on beneficiaries (financial sustainability, marketing)
				governance & compliance (insurances, safety, managing risk)

Appendix E: Detail of timeline chart of when success factors become critical to a project

The following table shows what the participants at the workshop thought, about the stage at which each critical success factor was relevant. They marked whether each factor was critical at each stage (✓) or not (✘). The 'Good governance' factor was added near the end of discussions after they had marked their thoughts on the timeline chart, so little detail is recorded**.

Success Factors	Concept/idea stage	Setup (getting up & running)	Establishment (1-2 years once setup)	Ongoing (2+ years)
Adequate Resources (time, money, staff, volunteers)	✓✓✓ Time & planning Can start small	✓✓✓✓ Volunteers/location/funds	✓✓✓ All items	✓✓✓ Regularly review
Evidence of impact on beneficiaries	Hard to resource so estimate needs based on research	✓✘✘ Meeting need more important, but may be needed by funders	✓✓✓✓ Have review process in place before start	✓✓✓✓✓ To continue funding
Flexible and adaptable to changing needs and circumstances	✓✓✓ ✘✘	✓✓✓✓✓✓✓	✓✓✓✓✓	✓✓✓✓✓✓✓
Meeting a need	✓✓✓✘ Research to understand need	✓✓✓✓ ✘✘	✓✓✓✓✓✓	✓✓✓✓✓ Regularly review
Passion and determination	✓✓✓✓✓	✓✓✓✓✓	✓✓✓✓✓✓	✓✓✓✓✓
Work well with others (learning from others, networking, external to the VCS sector)	✓✓✘ Not necessarily, altho' don't reinvent the wheel	✓✓✓✓✓✓	✓✓✓✓✓	✓✓✓✓✓✓
Use the right skills	✓✓✓✓✓✓	✓✓✓✓✓	✓✓✓✓ may change - depends on service	✓✓✓✓✓✓✓ Regularly review
Good governance (added at end)**		✓	✓	✓ Regularly review