

## ECFI Collective Action Learning – Digital Transformation

Report by Two Ridings Community Foundation on their Long-Term Plan engagement Nov 2020- May 2021



### 1. Two Ridings Community Foundation

Two Ridings Community Foundation is a UK charity that provides grants & support - to local groups improving lives and communities in North & East Yorkshire - from funds that it maintains and administers on behalf of multiple donors.

Founded in 2000, Two Ridings has grown steadily in terms of long-term funds and grants made. It currently has £6m in endowed assets and made £3m in grants in 2020/21.

The area of North & East Yorkshire is geographically large: 4,133 sq. miles and home of 1.4m people. On the surface, many of the places in our region appear to have statistics that indicate issues like poverty, ill health and crime are less prevalent than for other parts of England. However, drill down beneath these statistics and there are many pockets of need, even in the most affluent areas, whilst in others, the need is very apparent and visible for significant proportions of the population.



### 2. The challenge – setting our long-term plan for the next five years

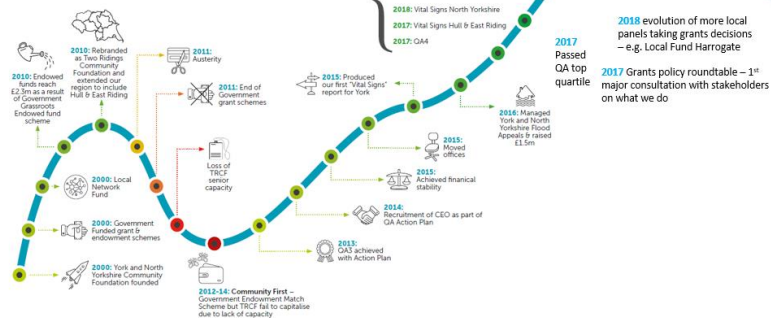
We wanted to use the time and insights offered via ECFI to work through how to develop our next five-year plan, including revising our vision and mission. Diagram 1 overleaf shows our history and trajectory and the factors leading to 2021 being a critical time for us to invest time and energy into revised vision, mission and long-term plan.

Our ambition was that by June 2021, we would have a long term plan that is owned by the board, staff, and volunteers (by owned we mean they can see their words and future in the strategy). We have been open to stakeholder feedback and input and we have something we can hold ourselves to account to over next five years that supports our shift to being a Community Foundation that convenes, advocates and supports the groups and communities of North & East Yorkshire as well as fund them.

**What is this?**  
This timeline represents Two Ridings Community Foundation journey of growth since its formation in 2000.

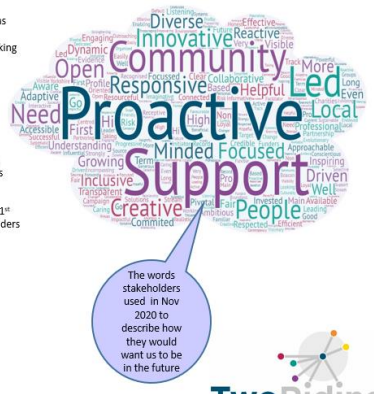
In November 2020 we embarked on a deep review of what our next long term plan (2021-2026) ought to challenge us to achieve.

## Two Ridings Community Foundation Timeline



The words stakeholders in Nov 2020 used to describe us now

How we are framing our mind-set for 2021 beyond



**Two Ridings Community Foundation**  
Giving across North & East Yorkshire

Diagram 1 – Two Ridings Community Foundation history.

### 3. How we approached it, including the digital solutions

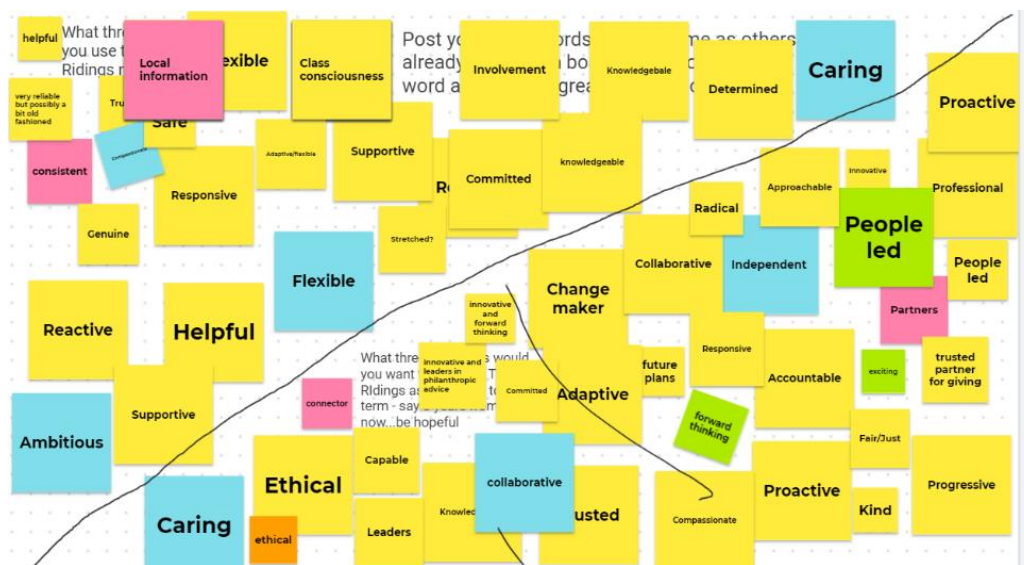
One of the biggest challenges was that we would have to do the engagement during Coronavirus, when we were all working remotely, holding virtual board meetings and unable to meet stakeholders in person.

In November 2020, we decided we would use the digital space creatively to create the plan. Thanks to the work we are doing with Lankelly Chase Foundation we had a member of the team who was very skilled in facilitation and engagement. She introduced us to Jamboard – a very simple and easy to use digital tool for collaboration. It creates a digital whiteboard where all users with the link can simultaneously add post it notes, images, lines and text. We now use this tool for all engagement, and team activity. We also engaged Tom Bailey who drew some of the engagement session feedback. This, combined with the insights from the ECFI Digital Transformation programme, meant that we focussed on the messages we needed to convey, rather than getting bogged down in digital tools.

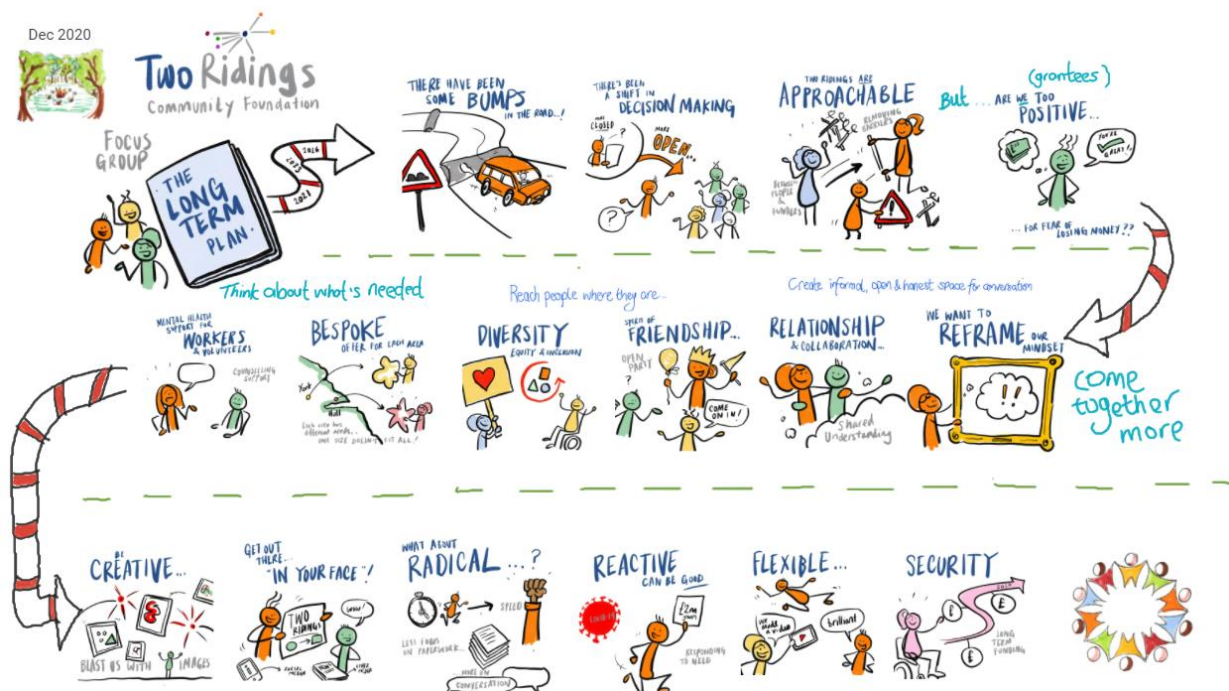
We kick started the process by creating a Survey Money to ask a wide range of stakeholders, “what three words would describe Two Ridings now and what three words would they want to use to describe us in the future”. We asked for responses via our e-newsletter, social media, email contacts and through networks such as local infrastructure. This goes out to most of the groups we fund as well as the donors we work with and other stakeholders. We got over 70 responses.

In addition, we shared a Jamboard space with staff and volunteers to capture their three words, people could access this at any time, thus enabling confidential engagement. The diagram below shows one of the very busy Jamboard of words: left hand diagonal side is the words used now about Two Ridings and the right-hand

diagonal side shows the aspirational words used to describe Two Ridings in the future.



We held Zoom based focus groups during November with attendees drawn from respondents to our survey. Tom (@TomBaileyArt) captured the feedback better than any written report could. See below for image he created from the focus groups:

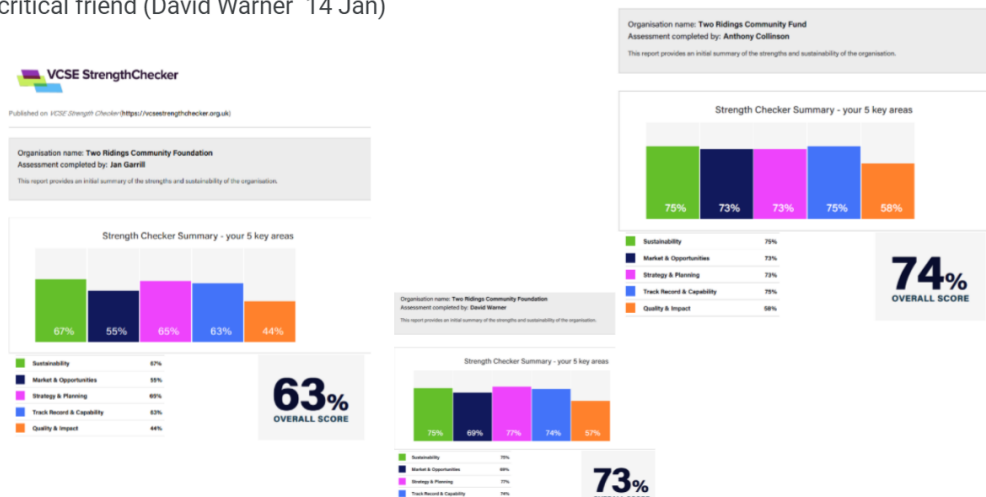


We shared this via Zoom with our board in December 2020 and recruited a small Long-Term Plan (LTP) Task Group of staff and trustees to work on creating the long-term plan, using this diagram as our inspiration.

The groups first task was to get a baseline for the organisation's strengths. We used the VCSE Strength Checker, a free online resource that analyses the strength of a charity and identifies areas that could be improved. The tool was completed,

separately by the staff, the trustees and an independent person who knows Two Ridings, but has a wealth of insight into other funders, David Warner. The scores from all three perspectives were remarkably similar – giving us confidence that the assessment was realistic.

Notes from VCSE Strength checker with senior team 7th Jan, trustee task group 8th Jan & critical friend (David Warner 14 Jan)



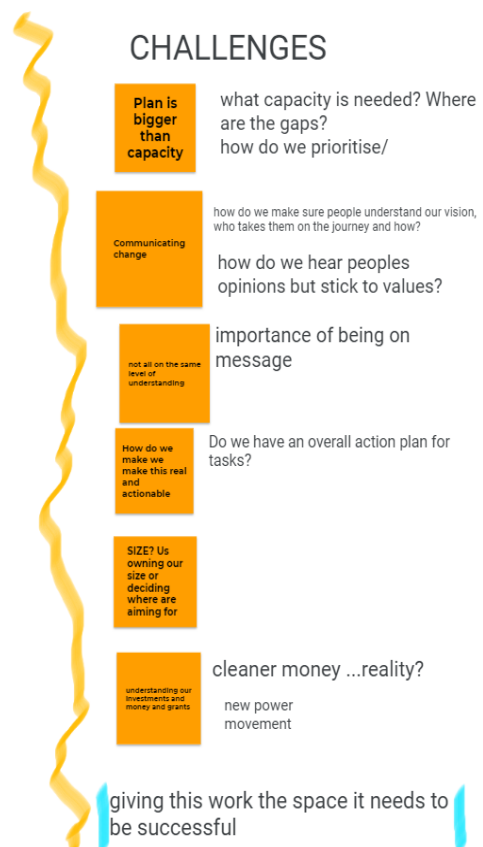
This identified some areas for focus for the LTP. These were:

- Two Ridings needs stronger alignment between vision, mission & strategies;
- Our marketing and communications needs improving; and
- We need to be able to evidence our impact.

During February and March 2021, the staff team worked on the LTP and the revised vision and mission. This process was supported by the involvement of two of the team (CEO and Finance & Operations Officer) in the fortnightly ECFI sessions. We used our Jamboard to work on our Feb-June timeline so we could make the most of the time with CF colleagues. It also made our planning more realistic.

Using Jamboard meant that we could keep all the boards together and build an iterative plan, allowing interactions and changes to be shared with all the team. This was important if the plan is to be understandable to all.

Words used were challenged and changed to simpler, more understandable words (plain English). For example, although convening was a word many in the team understood, when we tested it with others



and with trustees, it was not as well understood. The image above shows the contributions on the challenges facing us in achieving the long-term plan.

The staff and LTP task group also spent March and April time honing the vision and mission following feedback from the Board in March when we presented our initial draft of the LTP.

The revised Two Ridings mission (see right for the team endorsement of the agreed mission) was confirmed by the board in April 2021 but the Vision (see below) is still being finalised and we expect it to be confirmed by the June 2021 board.

Our mission is: With people at the heart of all we do, we contribute to positive change in North & East Yorkshire by developing relationships, inspiring investment, and making grants to transform lives and strengthen communities.

team decision and agreement this is a favourite!!

## A connected, thriving North & East Yorkshire for all

logic behind choice of words

**Connected** - conveys our role to connect donors and groups, groups and groups, other funders. Connected also implies people are connected through activity and engagement

**Thriving** - this indicates prosperous and growing; flourishing

**North & East Yorkshire** - defines where we are

**For all** - inclusive, equitable. Allows us to focus on supporting those who might be most marginalised

**no glass ceiling with this**

simple, aspirational and bold. sustainable language - plain English

Feel aspirational

**Easy to remember**

thriving means healthy not unlimited growth

this is a message of standing with - not heirarchy

connecting is simple english and describes a lot

connection is broad - with each other, with groups, partnership etc

Thriving is non judgemental - words like needy are judgemental

Goes beyond the basics - not about survival, is about exploring, time for rest, everyone should have more than the basics

describes us well

aligns to environmental consideration - cannot keep growing and growing -

I really like the two adjectives in this. Could even shorten to just 'connected, thriving.' in future or for certain contexts/publications

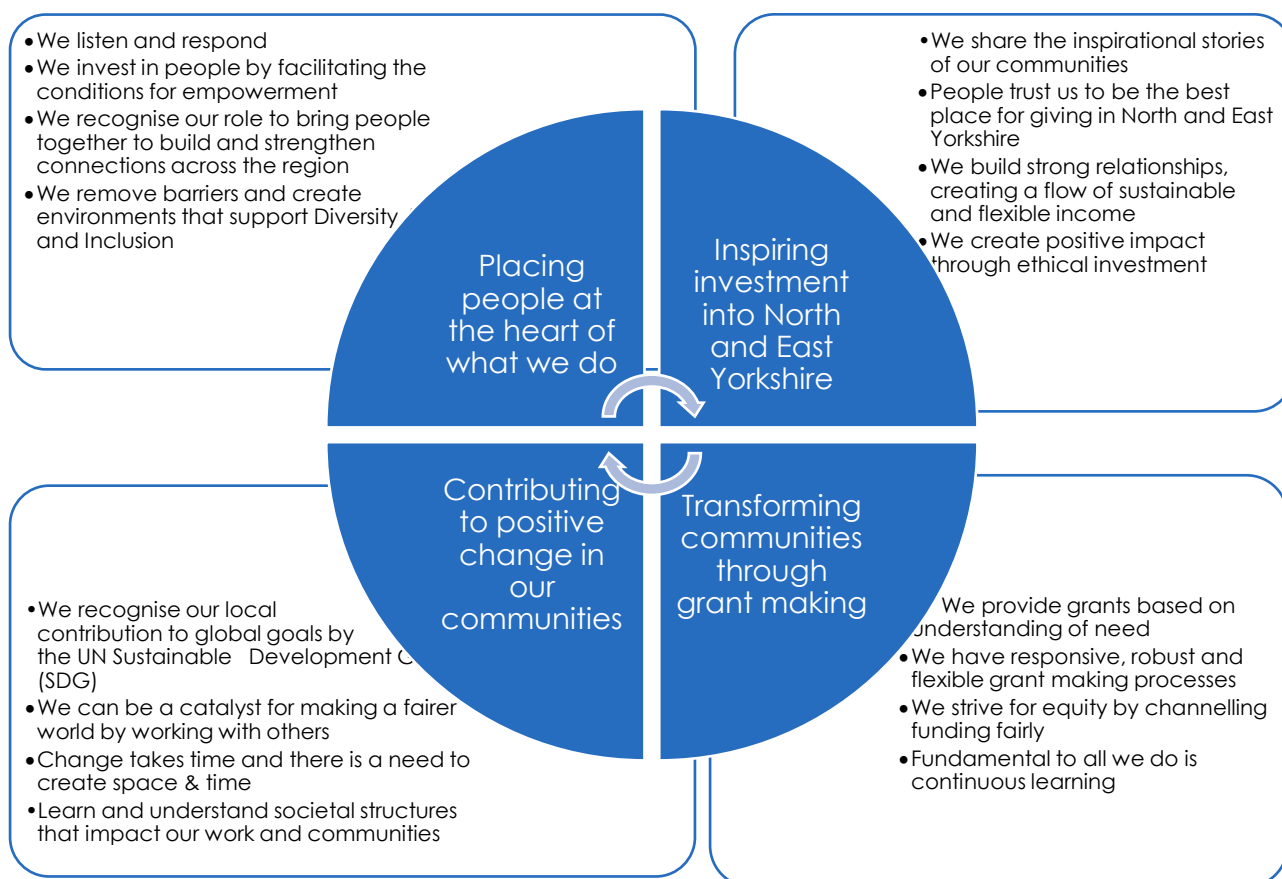
Staff feedback

#### 4. The outcome

The April Board confirmed the revised mission and long-term plan, including ambitious goals for the growth of the organisation. The vision is being consulted upon further with stakeholders of TRCF, with the intention that it comes back to the Board and approved in June. The following shows the draft vision, mission and high-level aims.

**Two Ridings CF Vision: A connected, thriving North & East Yorkshire for all**

**Mission: With people at the heart of all we do, we contribute to positive change in North & East Yorkshire by developing relationships, inspiring investment, and making grants to transform lives and strengthen communities**



#### 5. What did we change because of this?

The main change through the process was taking longer than originally planned. Taking time was essential to make sure all staff could take part and trustees could remain engaged in the process. In 2020/21 we made three times more grants than in a normal year so trying to fully engage staff meant we had to go at the right pace for them. Using the Jamboard was critical as it was both a means to capture ideas and views and to show the development of the plan.

## **6. Why does this work matter?**

Without this engagement over time and via varied digital approaches and tools, the plan would not be as well thought through, not as grounded in language and approaches that are widely understood and shared by staff and trustees.

Furthermore, it would not be something that we can use proactively to engage stakeholders. It would not be as owned by all and thus, our ability to be successful with our plans would not be as strong as they now stand.

## **7. What remains unresolved or difficult about the challenge?**

We still have more work to do on the LTP, especially regarding sharing it with stakeholders. This is being planned in May/June. Again, more time is being taken in the planning stage to make sure we get from the process what we need whilst being mindful of others' time.

## **8. What is likely to be the effect of your solution/work?**

The team of staff, volunteers and trustees at Two Ridings Community Foundation have been involved in the creation of the LTP, and the revised vision and mission. The likely effect is that we can create the 'golden thread' between our vision and the day-to-day actions we take.

## **9. What are most important takeaways from this process?**

If we want to go fast we go alone, if we want to go far, we go together. The process of engagement of the plan took longer than the CEO had expected but the outcome is better as a result:

- The language is more straightforward;
- The discussions with staff and the board created a stronger sense of shared endeavour; and
- The vision and aims are already appearing in our day-to-day reports and language.

Digital engagement is no different from face-to-face engagement, the channel of digital presents some different challenges but the basics of good engagement didn't change:

- Be creative – don't rely on word dense communications.
- Be respectful of others time – ask questions and listen.
- Be clear – what is up for discussion and what can't change.

And finally, a critical takeaway regarding digital: sometimes using one or two simple digital tools like Zoom and Jamboard is all that is needed. People using them feel comfortable and it aids engagement and record making, rather than getting in the way.