



Case Study: Structuring a Charity for Future Growth

The Challenge

This successful charity works on the promotion of employment for disabled people. As a member-funded campaigning body for over ten years, it had staffing levels of 20 - 30 and multi-million pound turnover. However, its operations had reached a plateau and it needed to structure itself for future growth and increased impact. They approached us asking how should they structure themselves for the challenges ahead over the next five years?

They had established several important services:

- An advisory telephone help-line staffed by legal experts;
- A successful publishing business for specialist publications in its field;
- An annual programme of c. 40 events to raise awareness and give expert advice on the employment of disabled people, to both members and non-members.

The charity's internal structure reflected its busy programme with staff divided into many small work units of one or two people each. The organisation reflected the complexity and intensity of the work, and was stretching to 'punch above its weight' with limited resources.

Tricordant's Approach

The first step in the process was to draw out the internal knowledge from across the charity about the fundamental nature and purpose of the work. This was done using 'Tricord Mapping' of the charity's overall top-level whole system Tricord with a focus on its core identity, whilst also mapping the Tricords of the sub-units and their external relations. This was done through a series of open discussions with key members of staff supported by gathered factual data.

This mapping identified gaps with the current organisational structure. A future target structure could be envisaged that could: a) build up and develop the charity's defining key skills and knowledge; and b) be made of a series of workgroups with the capability and delegated authority to take forward the key areas of impact the charity needed to have on the world.

By working backwards from the five-year target organisation, the management team developed a change programme to plug these current gaps, transform the structure, develop new skills, change the culture, and grow the organisation as required.

The Fundamental Nature of the Organisation

The above approach identified that the organisation had four foundational areas of knowledge:

- Understanding key aspects of law that define their main area of interest.
- How this law should best be applied in practice given a paucity of relevant case law.
- How to assist employers of all sizes in organisation-wide cultural change in how they recruited, developed and retained people with disabilities.
- Understanding the way that employers work, so that they can think as employers think, respond to them appropriately, and represent their views to Government and others.

Built on these core knowledge areas the charity needed to have three areas of influence on the world:

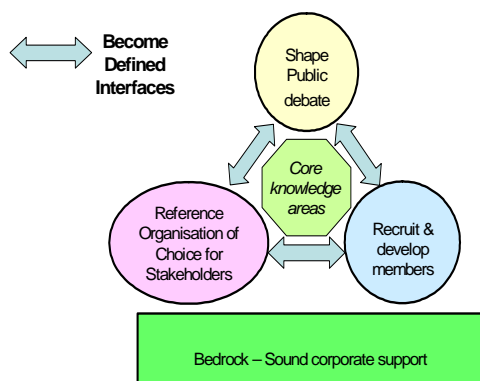
- The organisation is a **membership organisation** both representing and funded by its members. Fundamental to its existence is recruiting and retaining fee paying members; engaging and serving them. This whole member related activity was dubbed the employer's journey that needed to be managed as an end-to-end process for each employer, or for a group of employers in a sector.
- The charity is seeking to be a **thought-leader and campaigning organisation** and so needed to engage and inform relevant public debate.
- The charity as a **lobbying organisation** needs to identify the leading government departments and influencing bodies (stakeholders) working on the agenda and develop close, professional and trusted relationships with them.



Proposed Organisation Design

It was realised that these three tasks had different rhythms to them. The first and last required steady, long-term campaigns, getting to know people, building confidence and influence through providing reliable support. The middle activity of public debate, however, was all about quick reactions and the cut and thrust of conversation; working with the media to influence headlines.

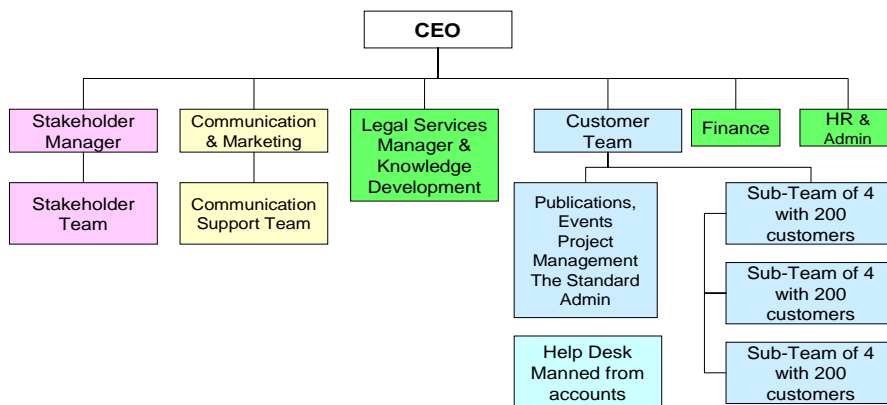
Structured for Impact



These three areas, through closely related, needed to be pulled apart so that they did not interfere with each other. So while the whole organisation has a common purpose these three areas needed to be organised separately. This led to the model shown here where one can see the emerging defining processes and functions of the charity. The diagram has the distinguishing knowledge at the heart of the organisation, each of the units delivering external impacts in the three circles around the periphery, and all supported by sound Finance, HR and IT.

From this a five-year structure was identified which radically simplified the charity's structure. This was widely accepted by the charity's staff and management. They have begun the journey towards full implementation.

5 Year Structural Vision



Conclusion

The future will demonstrate the success of the structural concept. What is clear was that Tricord mapping provides a powerful means of thinking about identity, impact, structure and culture. It provided an insightful and effective tool that asked critical questions, dug out effective answers, and came through with viable proposals.