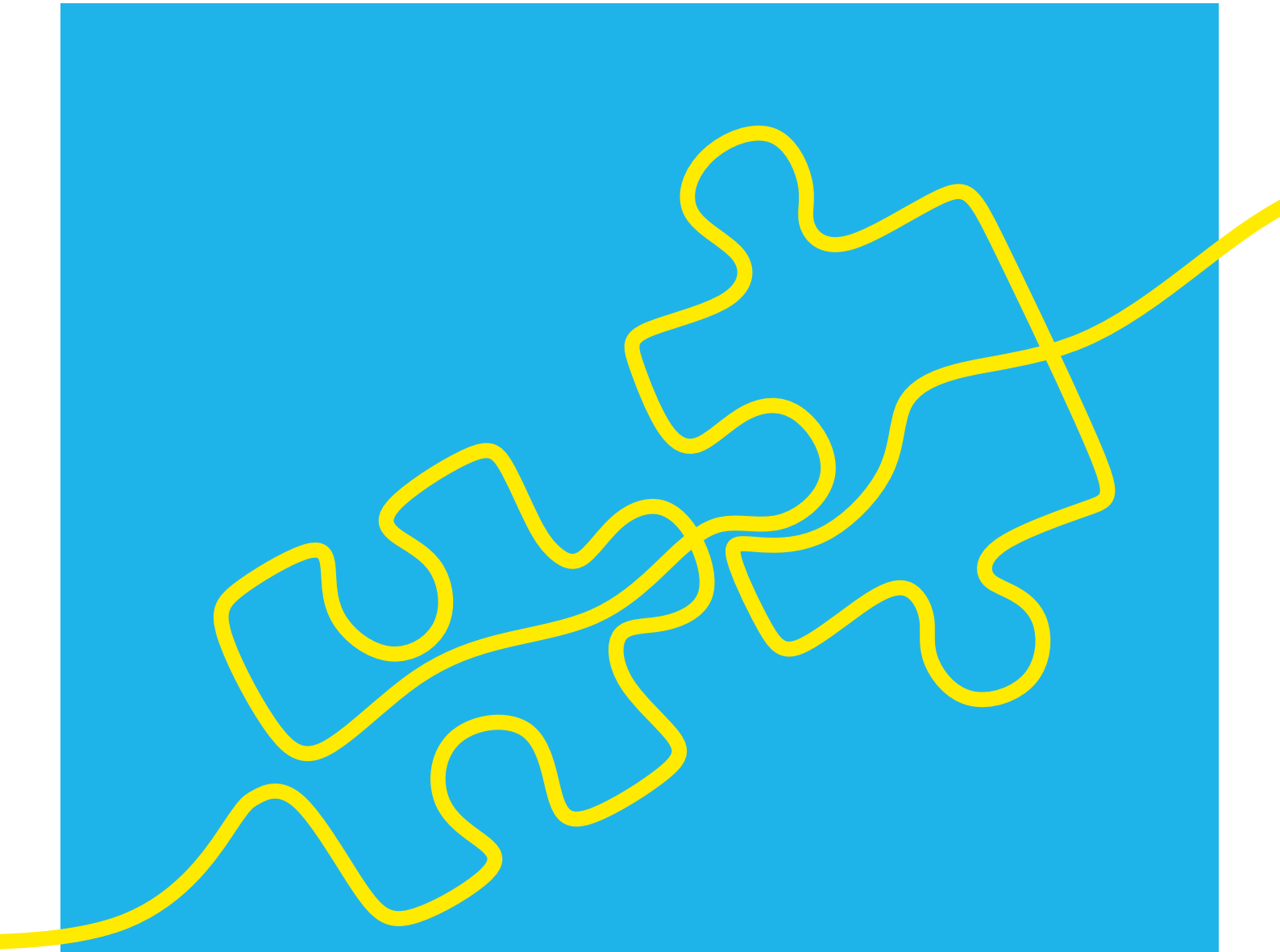


Carmichael.

# Strategy 2022~25



**Guiding nonprofits**  
carmichaelireland.ie

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# About Us

Carmichael is a leading specialist training and support body for nonprofits in Ireland. Our training, support and resources enable our members and partners to be:

- ~ Better informed and equipped to carry out their own remits more effectively
- ~ Aware of and able to employ best practice for good governance
- ~ Better networked with and supported by peer organisations
- ~ More efficient and effectively run so that they are trusted by their funders and supporters.

With over 30 years' experience based on a foundation of over 40 resident organisations we provide expert guidance to nonprofits to support them to become more effective and impactful at what they do. We believe good governance is the beating heart of a healthy nonprofit sector.

Carmichael as an accommodation provider also believes that by co-locating in a shared space, pooling resources and tapping into peer support and services, that resident organisations in both Carmichael House and Coleraine House can save time, reduce cost, upskill and thereby, focus more on delivering quality services to their beneficiaries.



# Context for the 2022 ~ 25 Strategy

This strategic plan was developed over the April-October 2021 period. The operating and external environment during this time was dominated by the global Covid-19 pandemic. The pandemic has required major changes to the working environment and how services are delivered. The medium- to longer-term impact and implications of these changes and the nature of the new and emerging hybrid models of working and delivering services are still very much unknown at the time of developing the strategy's objectives, actions and targets.

The assumptions on which these were based may prove to be inaccurate or invalid as society enters a period of "living with covid" and the new models of working get implemented and adapted. As a result, a major checkpoint review of the strategy, its implementation and underpinning assumptions will be undertaken in Quarter 4 of 2023 to identify any changes or adjustments to the strategy that may be required.

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# Mission, Vision & Values



## Mission

To work with nonprofit organisations to enhance their governance and effectiveness in delivering their objectives, by using Carmichael's sector knowledge, experience, resources and physical space to help them achieve real and positive change for their beneficiaries.



## Vision

A society where nonprofit organisations are valued and supported to achieve their goals and positively impact their beneficiaries and communities.



## Values

A set of core values informs the approach of Carmichael in achieving its mission and charitable purpose. These are:

- ~ **Good Governance:** We uphold and promote the principles of good governance: integrity, transparency, accountability, effectiveness and leadership.
- ~ **Communities of Practice:** We operate as a leader across the sector to build communities of practice spreading knowledge and embedding insights into organisational performance.
- ~ **Quality:** We strive for the highest possible standards of professionalism and expertise in everything we do.
- ~ **Responsiveness:** When organisations contact us, we work with them to meet their needs. We work to understand the needs of nonprofits that contact us and respond with solutions that are practical and tailored to their specific requirements.

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# Key Strategic Objectives

## ~ 01

Design and deliver a range of high quality, relevant and accessible services and supports.

## ~ 02

Explore and develop new client-focused services and supports and opportunities for growth and development

## ~ 03

Provide sector leadership by exemplifying best practice in good governance and client-centred services and supports

## ~ 04

### **Enabling objective**

Ensure we have the necessary and effective infrastructure, people, systems and support functions in place to deliver on our purpose and strategic objectives.



# Strategic objective 1

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## Design and deliver a range of high quality, relevant and accessible services and supports

The achievement of this objective is delivered through two key focus areas. They are the provision of;

- 1.1 Office accommodation, meeting rooms and back-office supports
- 1.2 Training and consultancy support services to nonprofits nationwide



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# Strategic objective 1

## 1.1 Office accommodation, meeting rooms and back-office supports in the Carmichael Centre

### Goal

To provide affordable office accommodation, meeting rooms and back-office support services to charities and nonprofits that are relevant and responsive to evolving needs and that make efficient use of our two buildings and allow our service users to be better able to deliver on their purposes.

### Actions

This will be achieved by the ongoing maintenance and enhancement of our facilities and by the effective management and delivery of the following services:

- Office accommodation - from desk sharing to own office
- Accounting & payroll
- Meeting rooms
- IT support
- Reception & Housekeeping
- Facilities Management & Maintenance
- Postal
- Catering
- Access to Community Employment scheme participants
- Equipment (Photocopiers, shredders etc.)



# Strategic objective 1

## 1.2 Training and consultancy (T&C) support services to nonprofits nationwide

### Goal

To provide a range of high quality, sector relevant and good value training and consultancy services to Irish nonprofits delivered through a range of effective and accessible delivery channels. This goal will be attained by achieving the following objectives.

1. Reach new audiences and expand the number of beneficiaries who are accessing our training and consultancy services.
2. Increase opportunities for growth by cultivating strong funding and income generation networks.
3. Continue to deliver relevant, expert, practical and effective training and support services.
4. Strengthen the capacity, decision making and sustainability of the Training and Consultancy team.

### Actions

#### **Reach new audiences and expand the number of beneficiaries who are accessing our training and consultancy services.**

To achieve this, we will;

1. Research and analyse our T&C clients to develop a profile to improve our understanding of our current and potential clients and their needs.
2. Develop a communications and marketing strategy that is effective in attracting clients for our customised training, participants (new and previous) for our scheduled training events and purchasers for our e-learning modules.
3. Maintain accessibility for individuals and smaller organisations through providing a range of topics, fair pricing, e-learning, and online delivery.
4. Expand our reach to new constituent groups (where funding becomes available and objectives align).
5. Cultivate proactively local and national stakeholder relationships.
6. Leverage the expertise of the staff within the team and wider organisation strategically for networking and brand-building opportunities.

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# Strategic objective 1

## **Increase opportunities for growth by cultivating strong funding and income generation networks.**

To achieve this, we will;

1. Increased the business development capacity within the team.
2. Grow the volume of contracted programmatic work.
3. Anticipate funding opportunities (such as tenders and calls for proposals).
4. Submit tender and pitch documents that are expertly and competitively prepared.
5. Maintain the production of timely, accurate and transparent funding monitoring and reporting.

## **Continue to deliver relevant, expert, practical and effective training and support services.**

To achieve this, we will;

1. Develop topics, themes and resources that adequately address the governance and management challenges of the day. These will be developed using the collective insights of participants, partners and staff.
2. Continue to provide our informal support service of answering governance related queries by phone or email from nonprofits.
3. Collect, monitor and incorporate quality data, research and analyses into the design of our programmes.
4. Measure, manage and monitor the expertise of the training panel and expand/adjust the panel in line with sector needs and service demands.
5. Work to ensure that there is growth and development in all programme areas.
6. Continue to develop and make available relevant free resources to assist nonprofits in the governance of their organisations.
7. Respond efficiently to requests for information and support.

## **Strengthen the capacity, decision making and sustainability of the Training & Consultancy team**

To achieve this, we will;

1. Clarify staff responsibilities and develop roles that are aligned with the strategic objectives 2022 - 2025.
2. Review and assess the skill and capacity needs of the T&C team to deliver on the 2022-25 goals and targets for the Unit.
3. Automate (where possible), administrative duties are and/or devolve to dedicated administration staff.
4. Optimise the CRM system Salesforce for data management and reporting system.
5. Simplify and significantly streamline where possible internal processes.

# Strategic objective 1

## **Critical Success Factors (CSFs)**

- Continued funding for our training staff from the SSNO programme
- Increase investment in business development and marketing capacity
- Maintaining and growing a high quality & affordable panel of trainers
- A strong high performing training team appropriately resourced to manage and develop our training and support services
- Ongoing investment in developing relevant and accessible training delivery channels and content.

# Strategic objective 2

## Explore and develop new client-focused services and supports and opportunities for growth and development



## Strategic objective 2

### Explore and develop new client-focused services and supports and opportunities for growth and development

#### Goal

To plan, design and organise the delivery of our services and supports in ways that optimise the benefit and value to our nonprofit clients and that are sustainable in terms of our resources and capacity.

The achievement of this goal will involve a series of research and innovation projects and feasibility assessments that will be identified and evaluated over the period of the strategy. Investment propositions will be developed, assessed and submitted to the board for guidance and decision.

We will monitor and assess developments in the sector and prepare annual competitor assessments of organisations providing similar type services to nonprofits.

We will be open to collaborative and partnership arrangements to research and assess trends and evolving requirements of nonprofits for services and supports.

#### The first two research and innovation projects under this goal will be to:

1. Assess the implications and adjustment that may need to be made to our office accommodation to address the expected trend of hybrid working models and the opportunities being presented by the Government's policy of a Connected Hubs Network (see; <https://connectedhubs.ie/about-connected-hubs.html>)

#### Actions

To achieve this we will;

1. Convert and fit out Room 16 in Carmichael House as a hot desk facility
2. Go live on the Connected Hubs website to promote and take bookings for our meeting rooms and available hot desks and private offices
3. Assess what other changes/enhancements should be made to our facilities and buildings to meet the evolving needs of the new hybrid working model.
4. Promote and market our flexible office accommodation and meeting room options

## Strategic objective 2

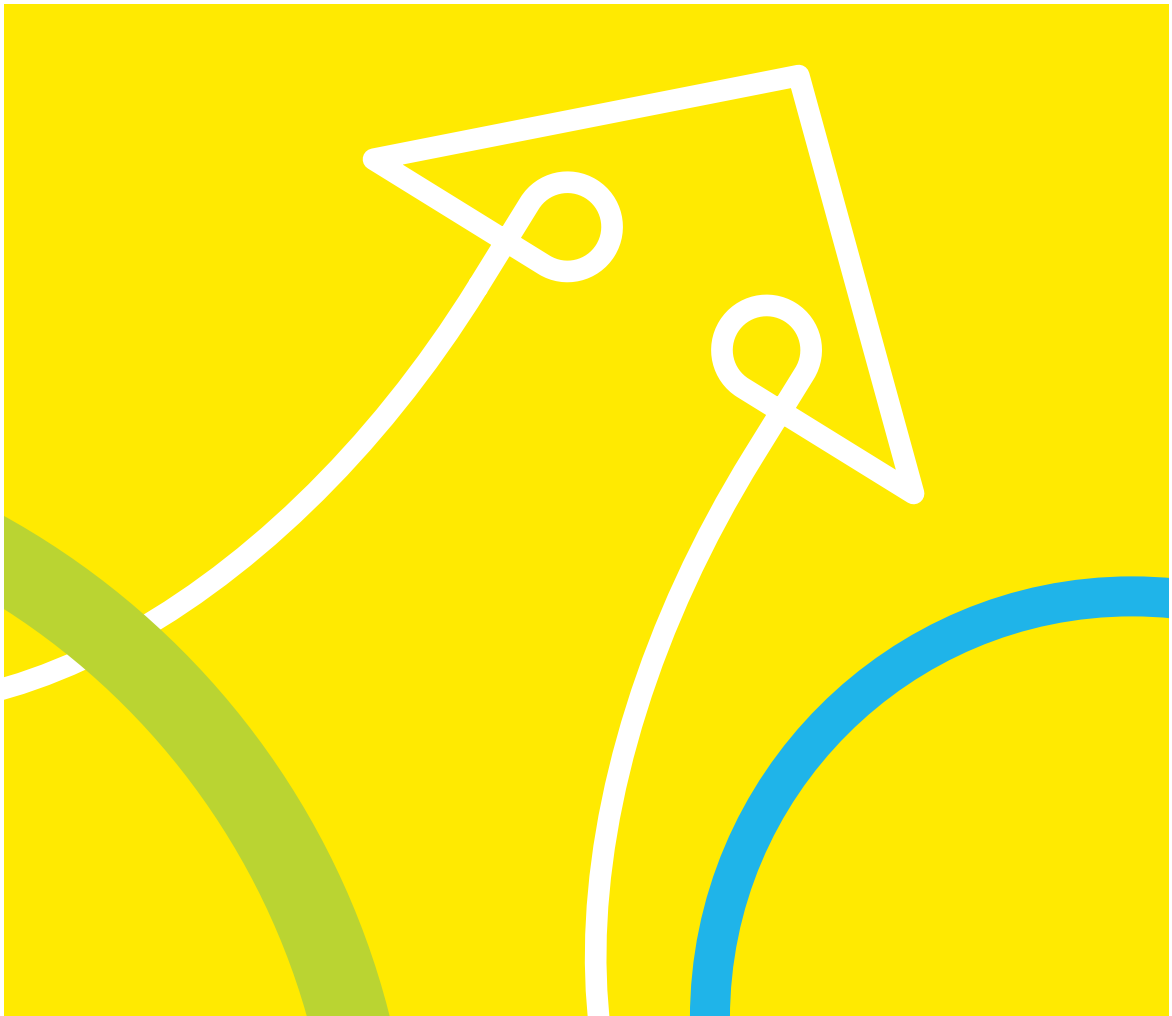
5. Develop a new membership category to cater for nonprofits who use our office accommodation on a flexible basis rather than on a fixed basis

2. Develop and offer a Certified Charity Trustee programme in partnership with TU Dublin

### Actions

To achieve this we will;

- To have completed the programme design and have received approval from the TU Dublin governing council by Q2 2022.
- To have launched a pilot programme by the end of Q3 2022.



# Strategic objective 3

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**Provide sector leadership by exemplifying best practice in good governance and client-centred services and supports**





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# Strategic objective 3

## Provide sector leadership by exemplifying best practice in good governance and client-centred services and supports

### Goal

To continue to develop and expand our sector leadership through our range of broader sector supports and engagements with the nonprofit sector.

These sector supports include;

- Good Governance Awards (GGA)
- Mentoring programme for CEOs of nonprofits
- Board Chairs Network

### Actions

1. Organise and deliver the Good Governance Awards programme each year

2. Organise and deliver mentoring rounds each year

3. Organise and deliver Board Chairs Network events each year

4. Explore the potential for providing additional services and supports to the Chairs Network

## 4. Enabling objective

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**Ensure we have the necessary and effective infrastructure, people, systems and support functions in place to deliver on our purpose and strategic objective.**



## 4. Enabling objective

**Ensure we have the necessary and effective infrastructure, people, systems and support functions in place to deliver on our purpose and strategic objective.**

### Goal

To have the necessary infrastructure, people and systems in place that are effective and deliver our services and supports to our clients in an optimal and efficient manner that meet real needs, are valued and makes best use our resources and capacity.

#### **4.1 There are a number of components to the infrastructure, people, systems and support functions that need to be in place and operate effectively. These are;**

- The Board of Carmichael
- Our Staff and Volunteers
- Our functional departments
  - Training & Consultancy
  - Finance/Accounts
  - Facilities
    - Reception, Kitchen and Housekeeping
    - The maintenance and upkeep of our Buildings (Carmichael House & Coleraine House)
    - Customer Services (meeting room bookings, postal, office accommodation letting)
  - Our Community Employment (CE) scheme
  - IT
  - CEO's office (this includes the following functions/activities, Strategic & Operational Planning, Sector Supports, Marketing, Communications, Stakeholder Management, HR, Governance Compliance, Company Secretarial, Funding, Donations & Sponsorship)

## 4. Enabling objective

To achieve this we will;

- Have robust and effective financial management and control systems in place to ensure that we have the necessary financial resources available and that our expenditure is appropriate, effective and in line with approved board policy and financial controls.
- Ensure that on a rolling three-year basis, our operating income and expenditure are in balance.
- Have an appropriate reserves policy that is reviewed annually with specified targets and plans to achieve our reserves target or to utilise surplus cash in excess of our reserves target that is in line with our charitable purpose.
- Make timely and appropriate strategic investments in our infrastructure (buildings & facilities), people and systems (e.g. IT, Marketing) to protect and enhance our ability to provide services and generate income.

### Actions

1. Develop an annual financial budget and obtain board approval by January of the relevant financial year and monitor and manage Carmichael's financial performance throughout the year.
2. Review at least once every three years the application and effectiveness of our financial management and control policies and procedures.
3. Review and update our reserves policy in Q2 every year.
4. Produce monthly management accounts within 4 weeks of month end (This target will not apply for the months of January and February when the focus of the Finance Dept will be on finalising the previous year end and audit).
5. Review our investment policy at least once every three years to ensure it is relevant and appropriate to the needs of Carmichael.
6. Develop a 4-year high-level target budget for the 2022-25 strategic plan.
7. Ensure that we have the appropriate oversight and controls systems in place for the proper governance of Carmichael and to comply with our regulatory and funding requirements.

## 4. Enabling objective

### 4.2 There are a number of key stakeholders and relationships that need to be managed and developed. These are;

#### Key Stakeholders

- Resident members
- Staff
- Panel of trainers
- Service users
- Core funders - DRCD, DEASP, Pobal, HSE
- Commissioning Bodies e.g. Pobal Local Authorities Sport Ireland PPNs Partnership Companies, etc.

#### Key relationships to be managed

Carmichael manages key relationships through annual stakeholder relationship management plans, which assign each organisation to a specific staff member and lay out tasks to be achieved with that stakeholder in the coming year.

- Charities Regulator
- Dept of Rural & Community Development
- DEASP
- HSE
- Pobal
- Sport Ireland
- TU Dublin
- PPNs/Local Authorities/Childcare Committees
- Partnership Companies
- Dublin City Council
- Good Governance Awards Partners and Sponsors
- Sector infrastructure bodies –
  - ➔ Tier 1; The Wheel, CII, Boardmatch, Volunteer Ireland, Dóchas
  - ➔ Tier 2; Benefacts, Community Finance Ireland, Clann Credo etc.

## 4. Enabling objective

**4.3 We will regularly review and assess our delivery approaches and models to see if they are still the most appropriate and effective to deliver our services and supports, are within our capacity (financial, staffing infrastructure and systems) to deliver and that they are in the best interests of our clients.**

### Actions

1. Develop an annual board evaluation,
2. Develop and maintain a Board and CEO succession plan.
3. Develop the 4-year strategy implementation plan and annual operational plans for each of the functional depts. (aligned with the 2022-25 strategy).
4. Review and align our structure and staffing model to support our strategy.
5. Assess how best meet the infrastructural & capacity building needs of the sector through collaboration, alliances & mergers with other providers.

# Major Risks and challenges

1. Loss of funding from a statutory funder (Pobal, DRCD, DEASP, HSE)
2. Economic downturn/recession negatively impacting demand for our services and the commissioning of our services by funders
3. Loss of key staff
4. Insufficient capacity to manage demand and ensure the delivery of quality services
5. Increased competition from within the sector and from outside the sector
6. Major structural problem with our building



# Supporting strategy development documents

1. Strategy planning framework with workshop dates
2. Carmichael's Charitable purpose and objectives extract from our Constitution
3. Purpose, mission and values
4. Intro to Carmichael
5. Strategic plan 2019-21
6. Key achievements in 2020
7. Key stakeholders relationship management
8. Key developments in our operating environment
9. SWOT analysis
10. Competitor profiles
11. Exec Summary of Proposed Pobal Skills Audit
12. Exec Summary of Cahill Report
13. Trends in co-working spaces
14. The future of office space
15. Carmichael Training and Consultancy Strategy
16. Mission and strategies 2012-2021

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**Carmichael is a registered charity in Ireland.**

Charity Number: 8973

Company Number: 205568

CRA Number: 20022464



An Roinn Gnóthaí Fostaíochta  
agus Coimirce Sóisialaí  
Department of Employment Affairs  
and Social Protection



pobal  
government supporting communities



Rialtas na hÉireann  
Government of Ireland



Carmichael would like to thank our key funders for their continued support: CE (DEASP), CSP (Pobal & Government of Ireland), the HSE, and SSNO (Pobal & Government of Ireland).



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