



How The Cares Family scaled

A study into the approaches to scale taken by The Cares Family

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Executive summary

The Cares Family is a group of charities that have gone from working in two boroughs in north London in 2011, to working across six boroughs in three parts of London and also the cities of Liverpool and Manchester by 2019.

This report, based on interviews with and observations of The Cares Family team, is designed to understand that experience of scaling, and to draw out lessons for The Cares Family and for other social organisations that are ambitious to grow or are being encouraged to grow their work.

It looks at the different factors which encouraged scaling to happen, and then how geography and places influenced and changed the ideas of what the charity was and did.

Finally, it pulls together the tensions that have exemplified the experience of scaling. This focus on tensions, identified in partnership with The Cares Family, feels more honest and human than traditional models of understanding scaling which can often be operational or procedural. It is especially relevant to The Cares Family as an organisation that did not initially intend to scale, and which did so accidentally before it did so by design.

The key question is whether these are tensions that are undesirable and should be resolved through strategic decision-making, or whether they are necessary or even desirable and should be maintained and kept in balance, because the tension itself can lead to creativity.

The research highlights many tensions, some small and some which almost define the charity's model. This report has grouped them into four key tensions that run through The Cares Family's DNA, and that have been exaggerated by scaling as well as by external factors:

- 1. Central versus local** – This is the tension of having both to adhere to The Cares Family's programme and funding blueprints, while also having the freedom to create and run a locally-rooted organisation from scratch. It is central to the ethos of the Founder and CEO that the best ideas and leadership come from the community itself, and that The Cares Family should not be part of a traditional charity sector or be commissioned by the public sector, but also that the local charities have clear programmes, language and core principles that are specific for The Cares Family. It is a tension between wanting to be truly bottom-up but managing the organisation in a top-down way to ensure that the essence of the charity stays the same in each of its locations.
- 2. Place versus programme** – Which part of the name matters more: 'Liverpool' or 'Cares'? In other words, how much can local issues influence delivery? This tension is linked to the one above, but is more about the specific places in which The Cares Family works and the tension of wanting to do more to fix unique local issues, but being limited in the ability to do so because of the national Cares Family framework. For example, can a local Cares Family charity communicate in a way that makes sense to local partners while still adhering to The Cares Family's social change ethos? This tension comes from The Cares Family's scaling investment originating in London while 40% of its focus is now in the northwest.
- 3. Entrepreneurial versus structured** – This tension comes from the speed at which The Cares Family has grown (between 2017 and 2019 in particular), the excitement of being

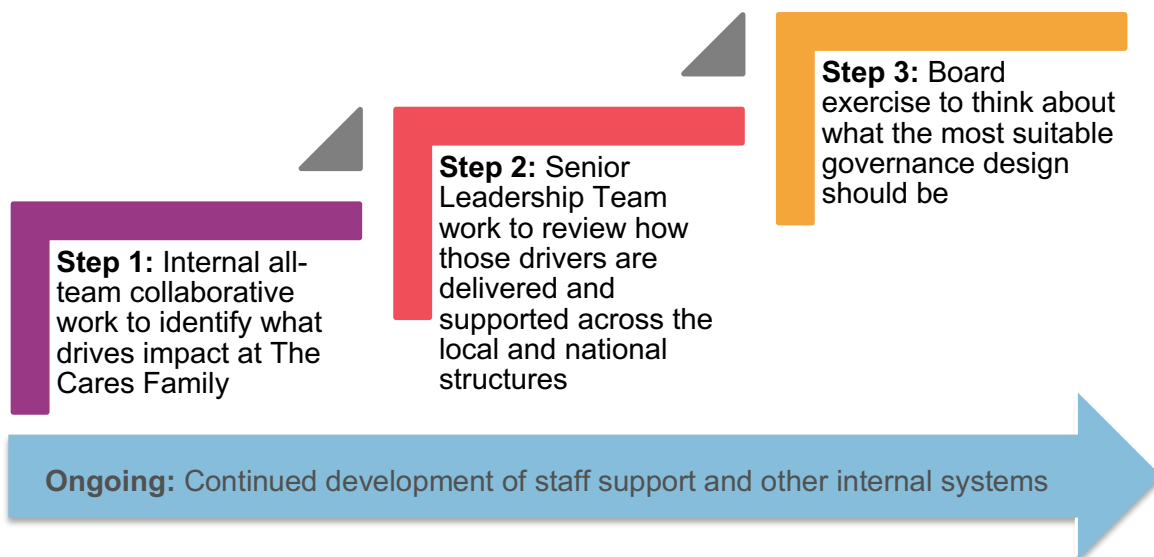
part of a growing organisation, but at the same time the feeling that structural and operational capacity is lagging behind. Many staff (and the organisation as a whole) have benefited from having the autonomy to innovate, to fix issues quickly and to make a personal impact in people's lives, while others have wanted more management, more process and less ambitious targets. Meanwhile, some feel that the the speed of scaling alongside the space for a personal touch have impacted on staff wellbeing, causing the charity to lose people. This tension is at the core of what pulls some staff together and what pushes others apart.

- 4. Informality versus accountability** – The last tension is between the warm and informal atmosphere both in core programmes, which are central to the ethos and impact of The Cares Family, and in the team, and how that can sometimes lead to a lack of internal accountability. It is about how staff are given lots of freedom in own their roles, but at the same time can feel micro-managed. It is also about being a relaxed community organisation with roots in local neighbourhoods, but still being part of a charity sector which largely talks a different language.

The Cares Family is both an organisation with legal responsibilities and funding commitments *and* an attempt to disrupt those broken systems, cultures and processes that have themselves contributed to a more lonely and less equitable world. It started in a moment, and has grown into a movement. It is a success story of social sector growth, but doesn't see itself as part of that 'sector'.

But scaling to an established organisation while maintaining an anti-establishment ethos has not been easy. High pressure and expectation have been experienced by many people throughout that journey, both inside and outside the organisation.

It is these tensions – sometimes even dichotomies – in The Cares Family which make the organisation what it is today. Completely eliminating these tensions would not be desirable, nor would it be possible. However, it is important that steps are taken to alleviate some of that tension if The Cares Family is to continue to mature. That is about making the journey smoother rather than removing all the obstacles along the way.



As a result of this research, this report recommends:

- That The Cares Family sets out clearly the central model for clear, replicable programmes, and local models for what can be adapted and developed in different areas. In this exercise, it is key to investigate what it is about the models that drive The Cares Family's impact – for example local variations, people, or the central structure. [Step 1]
- Once the drivers for impact are identified and agreed, the senior leadership team should review the organisational structure around these drivers and make it clearer what type of structure best supports the work locally, including in terms of budgets, fundraising, decision making and language. [Step 2]
- That The Cares Family build from these two steps to review the management of the whole organisation in terms both of governance and staff structure. [Step 3]
- Finally, The Cares Family should to continue to build on ongoing work to improve processes, policies and procedure to give the staff the support system they need to deal with the emotional work they undertake. This could include reviewing the appraisal cycles, pay, bonuses, counselling and the possibility of offering sabbaticals or secondments to employees who may wish to gain experience elsewhere. [Ongoing]

1. Introduction

The Cares Family is a group of charities that first opened in north London to bring together older and younger people to ‘hang out and help one another’ in rapidly changing communities.

The first charity, North London Cares, started work in 2011. It was followed by South London Cares (2014), Manchester Cares (2017), Liverpool Cares (2018) and East London Cares (2019).

Each branch of The Cares Family operates four core programmes: Social Clubs, Love Your Neighbour, Outreach and Community Fundraising.

Renaisi was commissioned by The Cares Family in 2019 to explore the journey of scaling to new locations. This study sought to answer the following questions:

- What has it taken for The Cares Family to scale?
- What does scaling well look like for The Cares Family?
- Why has The Cares Family developed differently in different places?

In particular, The Cares Family invited Renaisi to study the human as well as the operational inputs and outputs required to grow what started as an intentionally local model into a nationally relevant organisation aiming to achieve impact in multiple locations.

This piece of research, therefore, took a mixed-methods approach using qualitative techniques:

- A **review of documents**, including strategies, funding bids, and research documents.
- Twelve **interviews** with board members, senior staff, and team members from across all six charities in the group as well as with a former member of the team who was instrumental to The Cares Family’s growth. These interviews occurred between October and December 2019. Almost all quotes are named as either ‘board member’ or ‘staff’; no distinction is made as to whether the staff is part of the leadership team or not, except for in one case where a quote has been added after the research phase (footnote 5).
- Three staff **workshops** – one with the whole Cares Family team in September 2019, and one each with the teams at Manchester Cares and Liverpool Cares (both in January 2020).

This document sets out the approaches to scaling taken by The Cares Family. It first briefly describes the framework to scaling designed by Nesta – the principle partner in The Cares Family’s growth. It should be noted, that while The Cares Family applied elements of all four routes to scale from this framework, it is not a tool that was consulted prior to scaling or during the scaling journey.

The next section summarises the main drivers for growing the model and looks at the various operational approaches to scale taken by The Cares Family. Section 4 explores the effect of the local cultural differences in each of the organisation’s five locations.

Section 5 focuses on insights and feedback from people who have been central to The Cares Family’s growth. Finally, section 6 provides a list of fundamental ingredients required for further scaling The Cares Family model. A timeline of key events since the launch of the first of The Cares Family charities, North London Cares, can be found in the Appendix.

2. About scaling

Scaling is talked about in the social sector (and in all kinds of start-ups), as something that is both desirable and difficult to do.¹ To think about the challenge of scaling, and to understand it systematically, it is first important to have some kind of framework. This study uses Nesta's thinking on scaling social innovations, presented in their 2014 report *Making It Big: Strategies for scaling social innovations*.

According to that framework, social innovations are '*new products, services and models that both meet social needs and create new social relationships or collaborations*'². Social innovations can be framed as programmes, services, products or organisational models and can include ways of working, principles or ideas. Many social innovations start small and remain small, but some develop their innovations to work at larger scales. Scaling social innovations is often seen as an important step to tackling challenges entrenched in our societies.

Not all social innovations are set up to scale and embarking on a scaling journey could even lead to social innovations failing to reach their full potential. The skills and activities needed for scaling may differ from those required to run a local social innovation organisation. In addition, not all social innovators want to scale their operation.

Based on Nesta's work, the social innovations that do end up scaling tend to be those which:

- Are relevant beyond their initial context
- Are relatively simple
- Are clearly better than the alternatives
- Do not rely solely on the talents of specific individuals

In order to grow their operations, social innovators need to identify effective supply and demand, and be clear on what is fixed and what is flexible in their models, goals and aims.

*"Scaling is not just about growing organisations. It's about growing a social innovation's impact to match the level of need."*³

This quote highlights the potential for tension between the work of the organisation undertaking the innovation and the impact of the innovation. It is possible to see the organisation as both a barrier, as well as a route, to scale.

Table 1 shows four different routes to scale. It should be noted that social innovators often take several routes simultaneously, and none of the routes are clear-cut. It should also be clarified that this is not a document that The Cares Family consulted prior to its scaling.

¹ Ainsworth, D., *Could charities be doing more to spread good ideas?* (1 March 2018). Retrieved from <https://www.civilsociety.co.uk/finance/could-charities-be-doing-more-to-spread-good-ideas.html> on 19 May 2020 and Harnish, V., *Scaling Up: How a Few Companies Make It...and Why the Rest Don't*, (2014) are just two examples.

² Nesta, *Making It Big: Strategies for scaling social innovations* (July 2014), p.7.

³ Nesta, Key findings – *Making It Big: Strategies for scaling social innovations* (July 2014). Retrieved from <https://www.nesta.org.uk/report/making-it-big-strategies-for-scaling-social-innovations/> on 21 April 2020.

Table 1: Different routes to scaling. Source: Gabriel, M. (2014). *Making it Big: Strategies for scaling social innovations*. London: Nesta.

Scaling route	Models and approaches	Activities	Why choose this route?
Influence and advise	<ul style="list-style-type: none"> Campaigning and advocacy Consultancy Training 	<ul style="list-style-type: none"> Public speaking Publishing Engaging with policymakers Communicating with traditional and social media Advising or training others 	<ul style="list-style-type: none"> Potential to reach a broad audience Appropriate for sharing the vision of a concept of innovation – letting others find their ways to put it into practice.
Build a delivery network	<ul style="list-style-type: none"> Federations and membership models Communities of practice Kitemarks and quality marks Licensing Franchising Delivery contracts Collaborations 	<ul style="list-style-type: none"> Representation Advocacy and awareness-raising Transferring knowledge, codifying processes, sharing good practices, providing tools Training, support and quality assurance Community and movement building 	<ul style="list-style-type: none"> Potential to create a sense of shared purpose and direction, while ensuring the social innovation retains a certain level of fidelity to the original idea.
Form strategic partnerships	<ul style="list-style-type: none"> Strategic alliances Mainstreaming into the public sector Piggybacking on other organisations' infrastructure Joint ventures Mergers and acquisitions 	<ul style="list-style-type: none"> Brokering and managing partnerships with other organisations that allow a step-change in scale Transferring knowledge Creating a sense of common values and mission 	<ul style="list-style-type: none"> Potential to scale up innovations quickly – for example, through partnering with a larger organisation that has a greater reach and resources.
Grow an organisation to deliver	<ul style="list-style-type: none"> Setting up new branches Growing the delivery capacity of a central team 	<ul style="list-style-type: none"> Building staff and team capabilities Raising funds/investment Developing organisational capacity and systems 	<ul style="list-style-type: none"> Potential to have the highest level of control over how the innovation spreads Appropriate for social innovations where individuals are at the core of the innovation.

3. Scaling The Cares Family model

This section of the report looks at why The Cares Family began to grow and explores what was influencing the initial and subsequent decisions to scale the organisation.

History

When launching North London Cares in 2011, there was never an intention to grow the idea beyond a small community. Original infrastructure was only built for a small local charity, run by people living and working in the local area.

“Why we decided to grow? Because we could and should.” (Board member)

As early as 2012, stakeholders including the London Community Foundation and North London Cares’ advisory board suggested there may be some potential to replicate the model – that other communities around London and the UK were experiencing the same pace of change and loneliness as north London. Given the board’s roots in that local community, and particularly around Brixton, the interest in South London Cares was explored. Over the following year, formal discussions about setting up a new charity with funders and other community groups took place.

“North London Cares grew in a very organic way, almost like a response to an opportunity that [the CEO] saw. South London Cares was the natural growth from having one in north London.” (Staff)

The first months of building South London Cares were exploratory while also having ambitious targets for delivery in both the Social Clubs and Love Your Neighbour programmes. Two members of staff were making the organisation from scratch with all that entails; for example, finding Social Clubs venues, recruiting older and younger neighbours and building up a presence in the local community. At the local, programmatic level, this phase was very much driven by opportunism and testing what works.

“We did not do any planning, we did not consider the long term or medium-term effects of the decisions we made. Over the first two years, we undid so many of those decisions.” (Staff)

One of the decisions on which South London Cares deviated from what was done in north London was to run Social Clubs in sheltered housing schemes. Working within these structures caused numerous issues such as accessing the building and working with people suffering from mental health problems, which in turn unearthed challenging safeguarding issues.

This first phase of building South London Cares took its toll on staff, and some of those involved in this phase described feelings of burnout. At the same time, this intense period helped staff to grow and created a strong bond between the individuals working for The Cares Family. This tension between challenge and reward is something that flows through The Cares Family’s journey.

“Even though it was one of the best years, it was also one of the most gruelling years. I have mixed feelings about it now. Any hard experience is

very bonding, and I feel very close to The Cares Family people now, and you forge skills you wouldn't be able to develop in any other way – I do not regret it.” (Staff)

This exploratory phase helped to develop and refine a model that has now been replicated in Manchester, Liverpool and east London – but with alternative approaches, built on learning, each time. Since setting up South London Cares, The Cares Family has grown in different ways and for other reasons which are described below.

Main drivers for scaling the model

The main driver for scaling The Cares Family model identified in the interviews was one of a shared agreement about its **efficacy**. This was the belief amongst funders, trustees, staff and participants that **the model works** and that it has a **significant positive impact** on people, as seen through a variety of types of feedback and evidence. Many of those interviewed felt there was an imperative to share this impact beyond a small community in London.

“Honestly, we all believed in the work that we were doing and could see that the model was working and therefore were interested in seeing if it could work in other parts of the country.” (Staff)

A second common theme evident in the interviews was the need to **respond to the current climate around loneliness and isolation in the UK**. There was deemed to be an **increasing demand** for this type of innovative project to combat the issues. The Cares Family brand, model and impact had gathered a lot of attention and enthusiasm, and it was seen as a model that could work in various locations.

“At some point, the board and [the CEO] felt that we had got something here. Something bigger. In wider British society, isolation and loneliness is a massive thing, and we think we do something well in that space.” (Board member)

Once this direction was being pursued, a third key driver highlighted in the interviews was the availability and type of **funding**. One of the reasons for starting Manchester Cares and Liverpool Cares, and not continuing to grow within London, was the funding opportunities and interest from funders to replicate the model across the country, particularly in other urban and ‘rapidly changing’ locations.

This suggests the efficacy of and need for the innovation started the process of scaling. Still, the direction of the scaling was influenced by opportunity and leadership (the board of trustees and CEO).

Approach to scaling

The Cares Family did not set out with an ‘approach to scaling’. While the organisation was supported by Nesta, its progress is marked by several individual and collective decisions and investments compounded over time. Many of these decisions were based on context, opportunity and the availability of personnel, rather than strategy per se. Within that tension lies many of The Cares Family’s strengths and weaknesses.

However, while The Cares Family did not work to any set framework as it scaled, it instinctively adopted two elements of Nesta's scaling models: **growing an organisation to deliver** and **influencing and advising**.

Growing an organisation to deliver

The primary focus of The Cares Family's scaling strategy to date has been around **building branches** in new locations. They have fundraised to replicate the model a total of three times – first to build South London Cares, then to build Manchester Cares and Liverpool Cares, and finally to build East London Cares. Setting up separate charities for each of those locations has included activities such as a building staff and team capabilities (both locally and centrally) and developing organisational capacity and systems (e.g. CRM systems, staff handbooks) which are all activities central to this route. The branches are set up as separate charities whilst being centrally run by The Cares Family umbrella organisation, leadership and trustees.

"I am a big fan of the fact that we do have them as separate charities because 1. We keep the local identity in what we do, and 2. If we get it wrong and one of them goes awfully wrong, they are separated from each other." (Board member)

Inevitably, as The Cares Family has grown and matured, the **approach to scaling has become more structured and process-based**. For example, North London Cares grew organically, without many formal structures in place and wholly dependent on the first employees it could find. When South London Cares launched, the new charity took learning from North London Cares and worked to develop processes and policies that fit the model as well as the local area.

"South London Cares is younger than North London Cares, but it is a 'better run' organisation than North London Cares. It is a tighter ship. There was more process work done in the beginning when setting up South London Cares, while North London Cares was much more organic. Not that South London Cares is better than the other, but it is a different type of organisation." (Board member)

A couple of years down the line, things evolved quite differently in Manchester and Liverpool compared to north and south London, as the mature organisation had the responsibility to consider more policies and procedures, as well as more accountability to larger funders that worked in more procedural ways. Some interviewees highlighted that it was easier to communicate the model in Manchester and Liverpool as there was a **clearer story and format in place** by the time of those replications. In addition, research completed by volunteers from Deloitte⁴ during the scaling selection process had already identified Manchester and Liverpool as two urban areas that could benefit from The Cares Family model, and the CEO had spent a year scoping the new branches and building high-level local relationships. This research was important in giving a clear, evidence-based and consistent rationale for the sorts of places that would likely benefit from The Cares Family.

⁴ This research looked at metrics including demographic (age-related) data, data relating to social class, financial and other forms of deprivation, as well as loneliness indices the speed of change within different cities.

“We started to speak to local community groups about whether it would be plausible and advisable for us to do it. It was all pretty informal. It [South London Cares] was not this type of data scraping that we did later for Manchester Cares and Liverpool Cares.” (Staff)

In the process of setting up new branches, again under new charities, The Cares Family applied its learning and experience to improve. Despite the evolving approach to formation in each new location, there were a number of common themes that unite each charity.

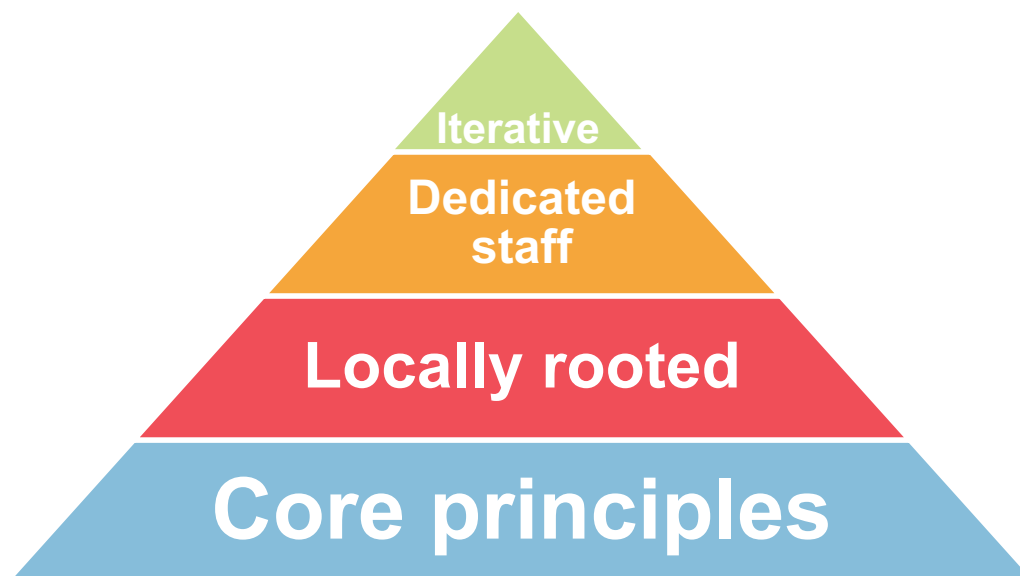
Refining and finessing the model

The Cares Family charities are **fundamentally the same** as a result of that replicating approach. Each is set up as a company limited by guarantee (not-for-profit) and registered charity. Each is therefore legally separate but run by the same group of trustees. Each has shared brand assets, website URLs, language, programmes and leadership staff. However, the intention has always been that each separate charity under the umbrella would be led by local people, with local people at the heart of the model. This means that, over time, replications have refined and adapted to improve local efficacy – and some elements of the core model are adapted specifically for local contexts.

Some of the fundamental pieces of the model include delivering the four core programmes (Social Clubs, Love Your Neighbour, Outreach and Community Fundraising), having a people-centred approach, and communicating the work in a similar style by celebrating the power of stories and relationships. Further key principles include highlighting and promoting the mutuality of those relationships, creating a place-based approach, and proactively inviting people to be involved through community organising outreach techniques. Many of the people interviewed for this research mentioned that the way The Cares Family communicates its work is a crucial part of the model.

“We think that what we do is brilliant and special, so we do not want to risk spoiling that brilliance by giving people a manual like a Starbucks. We are cautious about how things are structured, particularly around the language we use. If you look at communications from North London Cares and Manchester Cares, you will see that they are stylistically the same.” (Board member)

The diagram below highlights the fundamental principles of the national model, and the following section of this report will look at local variation within this model.



Core principles: The Cares Family brings older and younger people together to share time, laughter, new experiences and friendship in the context of rapid change. Its national objectives are to reduce loneliness and isolation through the power of mutual relationships which are place based and formed and nurtured pro-actively through mutually shared experiences.

Locally rooted: Despite communications being stylistically the same, all of those interviewed highlighted the need for using local language, local places and neighbourhoods and local storytelling to make people feel at home. When starting to replicate the model, there was a clear intention of taking a bottom-up approach with a focus on helping communities to thrive in their own ways. Many of those interviewed described that The Cares Family aims to build relationships in its new locations and to start with research to make sure there is a need for the model in every location. The organisation also aims to hire staff that are either rooted in or recently arrived in local communities and therefore live the values of connecting the past to the present to the future.

However, many of those interviewed felt this was not always done successfully:

“Most Cares Family charities have had the same problem – the rest of the community feel we are taking their money and their voice. In south London, for example, [leadership] said that the community wants to have us, but the other charities did not want us there. We are part of the community now, but that was not always the case in the beginning.” (Staff)

A common theme in the data was that the charities all have a ‘different vibe’ due to each being locally rooted. The programmes are fundamentally the same, but there are slight differences to make sure they are fit for the communities they work within. This is further described in the next chapter.

Dedicated staff: Many of those interviewed described how people working for The Cares Family across all branches have similar personality traits – positive energy; the ability to work independently and autonomously; confidence in one’s own decision-making; hardworking; values-based; and caring were all common themes in the data.

“I have never worked with a team that is so hardworking, that care so deeply about their job day-to-day. [The CEO] has also employed people that ask, ‘what’s next?’” (Staff)

That the people working for The Cares Family are hands-on and not afraid to step in and help each other out was a common theme in the data. This ethos extends to the board as well as the staff team. For example, when scaling the model, a numerically minded trustee stepped in and helped to develop the financial systems, a longstanding member of staff moved to the Northwest to help set up the branches there and senior staff members have regularly stepped in and run social clubs whenever it is needed. This has not just emanated from staff and trustee recruitment. It is also in the DNA of a charity which has always sought to do as much as it can for as many people as it can – and where the CEO is also the Founder of the organisation and therefore ran some programmes alone during first 12-24 months.

“When I started, everyone was working at maximum capacity. It causes people to be tired out, but it’s an important factor to why The Cares Family has scaled so well – it is a small team, but we get much done. Everyone is dedicated.” (Staff)

As this final comment implies, while this ‘start-up’ mentality has been important in the growth of The Cares Family, it comes with disadvantages too. Capacity has been modelled on a group of exceptionally dedicated people which may not always be replicable, particularly as the charity grows. Fear of ‘burnout’ and ‘overwhelm’ therefore run deep in parts of the organisation. These themes are explored in detail in section 5 of this report.

Iterative: Responding to opportunities in an iterative way was a common theme in the interviews. Many interviewees highlighted that there is a tendency to ‘shoot from the hip’ instead of being fully strategic in decision-making.

“Manchester Cares and Liverpool Cares are similar to the charities in London – all the learning has been iterative, and not hugely strategic. We are relying on funding, and the funding has made us set arbitrary targets.” (Staff)

This tendency was apparent in decisions around, for example, targets, recruitment, and restructuring of roles within the charity. It is worth noting that while people interviewed have experienced discomfort from this approach, others believe it is fundamental to the growth of The Cares Family and its ‘can do’ mentality.

Influence and advice

Whilst setting up new branches, The Cares Family has simultaneously scaled through the ‘**influence and advise**’ route. This route has been less explicit over the past five years – during which the CEO has spent a significant amount of time supporting various local charities across the country. However, as the profile of The Cares Family has increased since 2018, particularly since the founder became an Obama Fellow that year, this is now becoming a stated part of the

organisation's work – with thought leadership, contribution to wider policy discussions and partnerships all now being formalised as part of The Cares Family's five-year strategy.⁵

Summary: The growth of The Cares Family

This combination of history and analysis is designed to highlight a key point about how The Cares Family has scaled: it has been iterative and responsive locally but still retained a central ethos and core. It has, therefore, been 'growing an organisation to deliver' the core principles that are so foundational to the model – but in multiple places.

Because it has been slightly uncomfortable with that top-down approach that comes with having a central organisation, The Cares Family has stressed local rootedness, while also focusing on other tools such as influence and advice to others. The organisation has a mechanism of scale, but it was never explicitly designed in advance – it was learned, through exploration and opportunism. This balance was necessary to achieve scale both quickly and with quality, but has also led to differences, variations and tensions.

⁵ There is less data on this route as most interviewees were delivery staff who are focusing on the 'growing an organisation to deliver' route.

4. Geographic differences

The Cares Family's Founder and CEO believes it is because of – and not in spite of – its local approach that it has scaled into a national organisation. This section explores how The Cares Family model has scaled while maintaining its “locally rooted” flavour described in the previous section. If the principle of being rooted in place is common, then the expression of it will, by definition, vary.

Local variations

While the fundamentals of The Cares Family approach and strategy have stayed the same, each new location comes with its own ‘vibe’, language and tactics, and some staff said that they operate in a way to match those local differences. Each branch has looked at what is available in terms of social clubs’ locations, partnerships, funding and local history and culture, and shaped the work they do based on that.

Firstly, there are practical and definitional variations that came from picking up the model and applying it in different geographies. These can be seen most commonly in three ways:

- **Type of social clubs’ locations:** North London Cares works closely with community centres and runs many of their social clubs in those spaces, while South London Cares works with a wider range of partners offering spaces, including universities, cafes and community centres. In Liverpool, it became clear at an early stage that there are not as many community spaces the team could use compared to the other Cares Family locations. Instead, they made links with restaurants and bars where they could host social clubs. This was something that was mainly seen as a positive development by staff. However, it has given them some issues in terms of the number of people who can attend.

“It is great, and it means we are really doing what we say we do: opening up spaces that older people might not feel are for them.” (Staff)

- **Age of younger neighbours:** Even though The Cares Family is officially working with ‘young professionals’ (loosely defined as people in their 20s and 30s), many described that the age of volunteers ranged from 20-65. At North London Cares and Liverpool Cares some volunteers are in their 40s, whilst at South London Cares and Manchester Cares the majority are indeed between 20 and 35. In addition, most staff that took part in this research said they do not like and nor do they use the term ‘young professionals’ in their day to day work.

“I understand why we are using it for funding purposes because it is a clear thing as ‘younger’ could otherwise be children or teenagers. But everybody in the team has a problem with the ‘young professionals’ term; we just call it younger and older neighbours.” (Staff)

- **Neighbours’ willingness to travel:** Older neighbours at North London Cares tend to attend the social clubs that take place close to their homes, whilst the older neighbours in south London use public transport to get to the different clubs.

“It is a very different vibe in North [London]: they will not travel. We need to be responding to local communities rather than a borough.” (Staff)

Local challenges

There are then a set of issues which are less about the varying application of the model, and much more about the local context that The Cares Family is working in:

- **Size and shape of the area where the charity is operating:** The London charities are working in two neighbouring boroughs each, whilst Manchester Cares and Liverpool Cares work within the borough boundaries of the whole cities of Manchester and Liverpool. While the overall populations are similar in Manchester (510,000) and Liverpool (552,000) as they are across Camden and Islington (501,000) and across Southwark and Lambeth (663,000) combined, working across a whole city council footprint has nevertheless come with challenges. For example, Manchester covers a vast area (116km squared, compared with Southwark’s 29km squared) where some wards within the remit are nevertheless miles from the city centre, but some neighbourhoods that are closer (for example in Salford) are not in the remit. In addition to this, younger and older neighbours are not living side by side in the same way as they are in London, which makes outreach and Love Your Neighbour matching more challenging.
- **Availability of transport:** Both Manchester and Liverpool lack accessible and affordable transport infrastructure, which has made it difficult to make social clubs universally accessible. For example, the transport system in Liverpool is structured in a way that often requires people to go into the city centre no matter what the end destination may be. Transport links in London were not seen as an issue by any of those interviewed, though it remains notable that older neighbours involved in North London Cares are less open to travelling far away from their homes to be involved.

“In Liverpool originally, we built a similar model to South London Cares where you have clubs within specific neighbourhoods, but we soon worked out that was not going to cut it. All the buses went into the centre of the city, so people were not coming to things if they were not right next to their house. We basically moved all the clubs, so they were in the centre of the city, whereas in south London, people are now much more confident to move to different clubs and go all over the place, which is really nice.” (Staff)

- **Health needs challenge:** The different health needs in Manchester compared to London, where The Cares Family was first founded, offers another difference. Due to entrenched health inequalities, people in Manchester above 55 years of age are seen as ‘older people’, whereas in London most services for older people are targeted at people over 65. At times the local team in Manchester felt it was inappropriate to only allow those older than 65 to take part.
- **Availability of other services to refer to:** Linked to the health needs challenge, many of the interviewees and workshop participants felt that Manchester lacked a suitable range of

other services to refer people to. This created extra stress for staff as they did not always know who to turn to when a neighbour was in need.

- **Less local funding and subsequent competition:** Over the first two years of Manchester Cares' development after opening, there was a lot of local noise about Manchester being an 'age-friendly city'. That has given Manchester Cares not only many opportunities but also more competition. There were already projects similar to Love Your Neighbour in the area before Manchester Cares was launched. However, local staff highlighted that there were fewer grants in the northwest for already established projects working with older people and that many of the grants that do exist are smaller compared to in London. This is something The Cares Family has always been aware of and seeks to 'level up' by raising income in London for work in other cities.

Summary: The places of The Cares Family

Scaling has to deal with two types of challenges – an application challenge and a context challenge. The application challenge is more in the gift of the charity to make choices about change – it can choose to flex language find relevant space according to location, or it can choose to hold firm. The local context, however, will not bend to the choices of any single organisation, and these have been perhaps harder to navigate for an organisation with a central function, no matter how light touch. This has, however, presented The Cares Family with rich learning. The next section looks explicitly at that learning.

5. Scaling, learning and tension

This section outlines some of the key lessons that have been learned through the process of scaling The Cares Family. The task is not as simple as defining successes and failures, or positives and negatives. Instead, each lesson of scaling can be seen as a double-edged sword – a polarity for the charity to manage rather than a binary to choose between. In particular, it is noted that all the experiences listed are subjective, and the experience of The Cares Family’s collective growth has been to hold these multiple subjectivities and the ambiguities between them at once.

Central versus local

The process of harnessing local connections while building national culture has been a lesson in its own right. Many of those interviewed felt that the combination of having someone in the team **who knew The Cares Family model inside out** combined with someone **knowing the local area, as was the case with the creation of Liverpool Cares and East London Cares**, was absolutely key to success. It may be, therefore, what Manchester Cares lacked in its early days was not less influence from The Cares Family nationally, but more.

When setting up Manchester Cares, The Cares Family hired a local staff member who had the task to build the initial partnerships, hire and manage a local team and get the charity off the ground. Unfortunately, this approach did not work out, which put a strain on the leadership team that had to adapt its approach and spend an increasing amount of time in the northwest.

“It was a big tough job put on someone miles away from where everyone else was. It did not work. [The new hire] went through lots of training, the Director of Operations and the CEO went back and forth between London and Manchester trying to get [the new hire] up to speed and happy and productive, but it did not work.” (Board member)

It was therefore decided that South London Cares’ former Head of Programmes should move up to the northwest to help progress Manchester Cares after the end of its first year of operation and to simultaneously establish Liverpool Cares. Doing this was felt by many interviewees to be a great success.

“What really worked was having my contacts and experience combined with The Cares Family framework from the Head of Programmes. I knew how to get to places, I had the routine working with communities, and she had the framework and knowledge of how to make the organisation work. It was really beneficial to have her here.” (Staff)

However, sending an established London-based staff member up to the northwest to run Manchester Cares and to start Liverpool Cares did not come without its risks and challenges. The high risk of **burnout and feelings of isolation from the rest of The Cares Family team** and indeed friends and family were some of the key lessons from this period. Leading two charities’ programmes in two cities should have been two full time roles; and travelling between the cities was ultimately not sustainable. However, the short term plan did succeed in strengthening Manchester Cares and starting up Liverpool Cares simultaneously, and two people were later hired to lead the two charities separately in line with the original plan.

Across most locations, **The Cares Family has managed to keep core values and principles intact**. A common theme in the interviews and workshops was the **ability for staff to work autonomously, be creative** in the work they do and have **space to grow**.

“We got so much autonomy and freedom, most of the time I really thrived with that. I developed a lot of my skills in those first two years – I gained confidence, engineered relationships, and I learnt so much from the CEO in terms of communications. It is probably the most pivotal time in my life.” (Staff)

Communicating and collaborating across teams was often seen as a key tool for growth amongst individual members of staff. However, the growth of the charities outside of London has come with challenges in terms of team togetherness.

“The team here feel quite distant from the other charities, which is to be expected. It is hard to encourage that collaboration when we only get together sporadically.” (Staff)

When Manchester Cares and Liverpool Cares were setting up, all of the senior leadership team and all of the board were based in London. This meant that members of the senior leadership team **travelled to the northwest on a regular basis** – around three days a week in total in the first year of each new formation – to support local staff.

“We have learnt a lot about remote working. In London, we were used to seeing each other every day and supporting each other. We had a shared vision. In the northwest, it was isolating for the people that were hired.” (Staff)

Some staff in the northwest described **feeling isolated** due to the distance to London and feeling removed from important collaboration or decision-making.

“I felt very isolated even though I felt very much invested in The Cares Family team; being up there felt very removed from London. I felt there were decisions happening that I did not know about.” (Staff)

Equally, some members of the national team in London were **deeply isolated from their own communities** by the amount of travel and time away from home required in setting up the branches in the northwest and simultaneously coaching the teams there.

In addition, many of those interviewed felt that there was a **lack of communication across all the branches**. Many felt that they found out about big changes in an ad hoc manner and that they were not taken on a journey of understanding why decisions had been made. Some described having been blindsided by decisions made:

*“A lot of the time, [the CEO] would become involved and go over our heads.”
(Staff)*

However, some of those interviewed raised the point that even though staff should be taken on a journey, everyone across **all branches cannot be up to speed with everything that is going on** in The Cares Family – with 40 members of staff and still growing, it is just too big, and in any case, multiple close knit friendship groups run the risk of becoming cliques in an organisation of this scale.

“The biggest thing with scaling is we need to take people on a journey. When it was six of us, everyone knew about everything. Now there is 35 of us, and they cannot know everything.” (Staff)

This demonstrates another of the tensions in The Cares Family – the desire both for more opportunities to contribute to the national vision, and more desire for clarity of direction on that vision from the top.

Place versus programme

Building local connections and relationships and working closely with local organisations are at the core of The Cares Family model.

It was felt by those interviewed that **Liverpool Cares was welcomed by the local community**, and they received a lot of support from the start. For example, restaurants and bars provided free food and drinks as well as spaces for the social clubs to take place. A city steeped in community and solidarity, there was a sense that Liverpool cared already, but Liverpool Cares acts as a catalyst in an age of change.

When setting up East London Cares, the team used the learning from the start-up phases of Manchester Cares and Liverpool Cares and therefore carved out **more time for research and partnership building** before launching the programmes. Doing this was seen as successful and made it possible for the East London Cares team to hit the ground running once it was in place.

“Being able to say to [partners], we did a big piece of research, and all of the datasets showed that our model would work in east London and we have got volunteers already living in the area – to be able to have those conversations with people before launching has been very useful. We did also have that in Manchester and Liverpool, but I feel like we have led a lot more in east London by going out and speaking to organisations proactively before they're like, ‘who are you?’” (Staff)

The data exercise undertaken by Deloitte volunteers in 2016 that was used to guide the creation of East London Cares was the same exercise that informed the creation of Manchester Cares in 2017, and Liverpool Cares in 2018. Between 2016 and 2018, the CEO spent a significant amount of time in Manchester and Liverpool, including meeting council staff and potential organisational partners. The decision to create Manchester Cares and Liverpool Cares was made based in part on the data, in part on informal relationship-building, and finally on letters submitted to The Cares Family board by the relevant local Councils that The Cares Family would be a valuable addition in the community landscape.

However, a common theme across the interview data was that there had **not been enough research and relationship-building** done before South London Cares, Manchester Cares and Liverpool Cares started programmes. Whilst much work and time had been put into the planning stage of these branches than the original North London Cares, many of those interviewed felt that there had not been enough research on whether there were, for example, organisations already delivering similar activities in the local area.

After launching Manchester Cares, it became clear that the city already had projects similar to The Cares Family's Love Your Neighbour programme, for instance. This has, in some cases, led to tensions between the local community and Manchester Cares.

“We are still dealing with the repercussions from how things started in Manchester. We should have spent more time introducing ourselves and asking what was needed and how we could slot into what already existed and building something that fitted with the communities – as we have done in east London. This ended up being a cause for conflict. They felt that we just came in from London and tried to steal work from locals.” (Staff)

When setting up North London Cares and South London Cares, everyone involved used their personal networks to set things up. This was proven to be a key ingredient for success for those two charities. Some of those interviewed said it was harder to get things off the ground in the northwest due to the **lack of personal networks** which, in spite of hiring local people, was not mitigated.

“I do not think anyone appreciates how different it would be not being in London, starting something new somewhere else. We may have overlooked the fact that when [the CEO] started North London Cares – he had a friendship network, had friends become trustees. It is his hometown. We did not know anyone in Manchester, so we had to build relationships from scratch.” (Staff)

Entrepreneurial versus structured

Much of the **creative tension** at the heart of The Cares Family's growth is embodied in the CEO and his relationship with the rest of the team. Some of the interviews highlighted that the CEO has been very much the one who has driven the scaling, although the initial energy in doing so was in fact from the Board. It is clear, though, that the CEO has a different personality type to the rest of the team. This sometimes leads to frustrations and miscommunications.

“[The CEO] is an entrepreneur, and he is used to working with himself. Many people hired to The Cares Family come from the charity sector – really caring people who love teamwork, touchy-feely types of people. [The CEO] does not always feel the need to communicate, which makes it hard sometimes.” (Staff)

However, this difference in personality type and drive is also one of the things that makes it exciting to work for The Cares Family.

“I would not have joined the organisation if I did not see that very ambitious leader who was opening up all these opportunities, and I probably would have left a long time ago if we were not scaling. The fact that we are always doing this stuff causes stresses but also means we attract really ambitious and excited people, and we do ambitious and exciting things. It has its negatives, but it also has huge positives.” (Staff)

The CEO himself says that he has intentionally built a programmes team of listening and compassionate people, and a leadership team that balances and moderates his own instincts to take The Cares Family even further and faster:

“I know it can be hard on the team because I set the pace and I have very big expectations for myself and the organisation. At times, we have got the balance wrong between enterprise and management, ambition and realism and some people have been burnt out by that, including me. But I want to hold an organisation in the sweet spot of disequilibrium – where no one gets complacent because we haven’t solved this deep social disconnection yet, where people come to work because they want to change the world, but also where people’s lives are not dominated by the difficulties we face every day because of the type of work we do.”⁶

With the speed of The Cares Family’s growth from 2017 to 2019 in particular, structural operational capacity often lagged behind. There are three ways in which this gap particularly expressed itself:

- Despite improvements to the HR support in terms of **policies, processes** and **structures from 2017 with the appointment of The Cares Family’s Director of Operations**, many felt there was still an urgent need for deeper structural and operational **improvements**. Many of the team highlighted that the staff induction process was limited and that people had to figure out their own ways of working, which was difficult when they did not know where the boundaries were. This has caused significant stress for staff.

“We have never had HR, never had a focus on people and onboarding. The onboarding process is different for every charity. The central team has created some uniformity, but we all work to our own plans. We’re now 30+ people. I probably should know everyone, but I do not.” (Staff)

- A common theme linked to this was the lack of HR experience when it comes to **recruitment**. Some of those interviewed felt that The Cares Family tends to hire people that fit within the organisation’s compassionate culture but might not have the right skills or experience.

“We have a propensity to hire people who like to be liked and like to please people and care about social interaction and how they are being perceived, so there is not enough discipline or a willingness to stamp down on behaviour which is inappropriate or not conducive to a good Cares Family environment.” (Staff)

- In addition to this, many of those interviewed felt they were **not fully trained for the work they were set out to do**. There was a sense that The Cares Family has stayed in a stage where staff have to do things that might not play to their strengths. This reveals two more dichotomies in The Cares Family’s scaling: it both operates intentionally outside of a

⁶ This quote was provided in the reviewing phase of this report.

structured and programmatic approach to community in order to expressly change those structures, and as it has grown it has itself needed to become more structured. The organisation values connection, community and loyalty, but this creates imperfections in its own human resources pool.

Informality versus accountability

Another common theme in the interviews and workshops was that The Cares Family has a **supportive and warm atmosphere** and a **willingness** amongst staff **to help out**. Many described being able to ask anyone a question, that colleagues genuinely care about the work employees do and how others are doing.

“We are working with people in the community in a grounded way, and The Cares Family is good at replicating that support inside the organisation as well. It feels like quite an organic process. It does not have the structure that I was used to [in previous jobs]. There is less policy, less documentation, but everyone is so willing to get stuck in and help.” (Staff)

This comment gets to the heart of two of The Cares Family’s tensions – 1) that it is an intentionally bottom-up organisation, including in its own management, but that while that is one of the things that makes it special and that staff value, it is also something that team members can feel underprepared for; and 2) that while the staff feel close to and supportive of one another, the kinship they experience can lead to a lack of, or fear of, normal accountability.

“It is difficult to set boundaries, and it took a while.” (Staff)

Despite having less **structure and fewer policies and procedures** in place than some were used to in previous roles, it was felt by many that there had been **improvements** on this front in recent times, including through the creation of a staff handbook, better access to development opportunities, and work on setting clearer boundaries for staff. Team members in Liverpool, the second youngest Cares Family charity, specifically highlighted that they felt well supported in the onboarding process, which has helped them feel part of The Cares Family team.

Many of those interviewed described setting up a Cares Family branch as an exciting start-up process where staff have the autonomy to run with their own ideas, test out new approaches and shape their local branch. However, a common theme across the data was that there is a tension between having the **freedom to build up a new branch** whilst simultaneously having to **adhere to a Cares Family blueprint**.

“The national organisation gives us mixed messages about their expectations of the programmes and staff. There is a contrast between them saying that we have the autonomy to shape what we want to create, that we should be speaking the language of the community – but in reality, it feels like we are working towards really structured and predetermined targets and a style of talking. That has been hard to manage.” (Staff)

Some staff have felt **micro-managed** by the national charity in some ways and almost having **too much freedom** in others. The lack of ‘red tape’ was often related to lone working and being the only person in the local team having a specific role (e.g. Social Clubs Coordinator), and

therefore being the person shaping how social clubs are planned and delivered in the branch, with accountability to a Head of Programmes that may never themselves have delivered that programme. This situation made people feel lonely in their decision-making and also uncertain whether what they are doing is the right way of doing things. On the other hand, feeling micro-managed was related to the national charity 'interfering' with local decisions in terms of, for example, which methods work for running social clubs and having social media posts changed to fit better with the national charity's message.

Fundamentally, the organisational culture of The Cares Family is a 'both/and' culture, and not an 'either/or' culture. It is not just one thing, and it allows people to experience much fluidity and change, and learn a great deal. The experience of balancing the various tensions can be frustrating, but getting rid of those tensions would also rid the charities of a lot of what people most value about their experience working there – and the impact they can achieve.

The impact of tensions

The above tensions – which are inherent in most rapidly changing organisations – have created many opportunities and challenges for The Cares Family and its team. But one tension which presents very strongly in The Cares Family – given the context of social change and austerity in which it has grown up, the increasing vulnerability of the people the organisation works with, the pace of change in the world between 2016 and 2019 when The Cares Family scaled, the mentality of its founder to constantly take on new challenges, the gap between funder expectations and the reality of community, and the various dichotomies described above – is the feeling of being on an '**emotional rollercoaster**' that being part of The Cares Family engenders.

One of the most common themes in the interviews and workshops was team members describing working for The Cares Family as **challenging but at the same time rewarding and exciting**. Being thrown in at the deep end, lone working and autonomy to be creative were all things staff had strong and mixed feelings about. In many situations, the same things that made staff feel most excited about working for The Cares Family were also the ones that made them feel most burned-out and frustrated. This tension has helped staff to develop new skills and create close relationships with their colleagues, but has also caused the charity to lose people.

As well as team members stressing lots of positives in their experience, staff also described the work as '**draining**', '**relentless**' and '**gruelling**'. Many of those interviewed described struggling with the demand in communities, and dual burdens of administrative tasks required by the systemic approach of scaling combined with the organic approach of community, and the complicated social and emotional needs the charity was set up to address. This was particularly acute for those working on the Love Your Neighbour programme and Winter Wellbeing project.

“To work for The Cares Family, you need to be resilient and cope with so many things – you need to be ready for anything in this job.” (Staff)

Having **targets that were unrealistic** or felt arbitrary was another thing that many mentioned in the interviews and workshops. Some felt they were dictated by funders and others by the CEO, who might not have as much insight into how things are on the ground, having not led programmes himself since 2014.

“It felt like a lot we do at The Cares Family – we set a target before we think about how to meet the target.” (Staff)

In addition to this, many staff described having to **lead on multiple roles** when setting up a new branch which they felt was very challenging.

“The most challenging thing for me has been leading on two different roles – building and delivering a programme and finding my feet as a Head of Programmes. I love the programme, but it is definitely a struggle to split my time in that way.” (Staff)

All the above challenges have **impacted on some of the team’s wellbeing**, which was something that was highlighted as something that needs to be addressed.

“The main challenges for me have been the long hours and the emotional work. When I first started, I struggled in terms of wellbeing, adjusting to those circumstances. I stopped doing things outside of work. I had no time or energy, so I stopped exercising and stopped having a social life.” (Staff)

Feeling burnt out and overwhelmed, having sleeping problems, being anxious, feeling isolated and exhausted were some of the things that staff across the organisation on all levels mentioned in the interviews and workshops. This was seen as part of the trade-off by some, but also potentially something that can only be sustained for a while by others.

“This heavy load of work leads to staff turnover. These roles have a shelf-life; no one can work in them for a longer period of time because they are draining.” (Staff)

However, not everyone in the organisation feels this way. Some are motivated and energised by the challenges in society and in growing a scaling organisation. And others feel that the cultural focus on wellbeing in the organisation is self-reinforcing.

Summary: The balance of The Cares Family

In 2011, The Cares Family started out to connect specific local communities in north London – to be a small organisation rooted in place. Scaling to new locations has posed numerous challenges to that approach. The Cares Family is an intentionally bottom-up organisation that has now had to adopt systems, processes and management tools that are inherently top-down.

This dual approach has been uncomfortable and created tensions within the team, and the senior leadership team is still learning about the organisational culture it has built, what structures need to be in place to help people find a balance, and what needs to be open for interpretation by local staff. It is also still seeking the ‘disequilibrium sweet spot’.

These numerous tensions have contributed to highs and lows for staff who are naturally sensitive and others who are naturally ambitious. But it may be these same tensions that have enabled The Cares Family to scale at pace, and to gain national influence because of – and not in spite of – being rooted in local communities.

6. Conclusions and recommendations

What do the approaches to scaling taken by The Cares Family's tell us about scaling social innovations?

First and foremost, they tell us that scaling is hard and requires a lot of time, emotional resilience and tremendous effort on behalf of all those who are involved. The experience can often be more gruelling than fun, and the impact may take many years to be seen. That does not mean it is not worth doing. On the contrary – scaling good ideas is hard *because* it is so important.

This research also teaches us many other things:

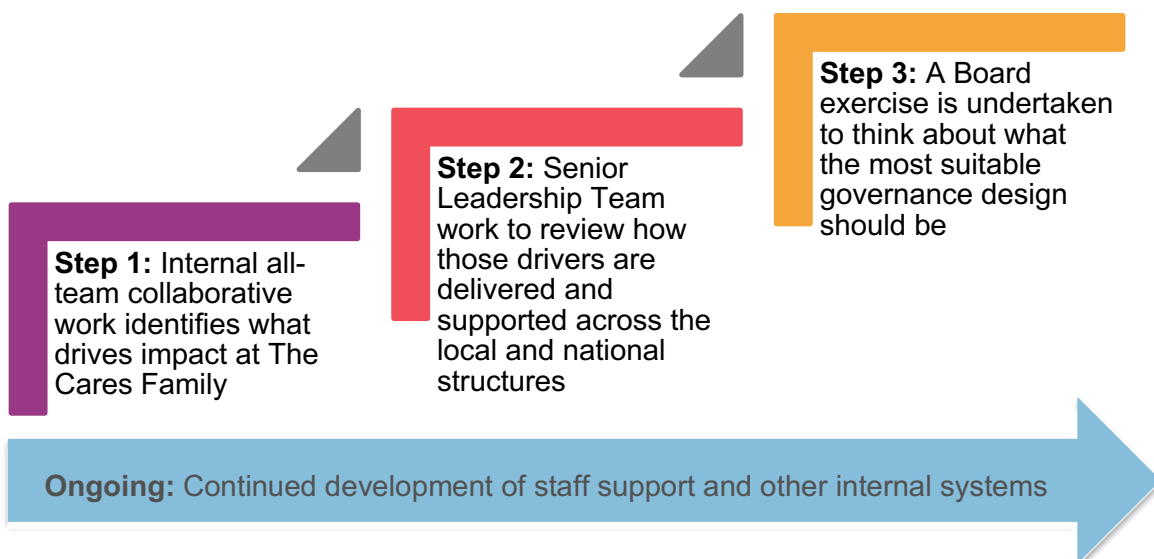
- As described in chapter 2, the social innovations that do end up scaling tend to be those which, 1. Are relevant beyond their initial context, 2. Are relatively simple, 3. Are clearly better than the alternatives, 4. Do not rely solely on the talents of specific individuals. The Cares Family has demonstrated its relevance beyond their initial context in north London, and the model is relatively simple to understand, particularly the Social Clubs and Love Your Neighbour programmes. There is, however, less data to support the other two characteristics, but The Cares Family has learnt, and are still learning a lot about not relying solely on specific individuals.
- The Cares Family's scaling occurred outside of any framework. We have used one in this report to reflect on the scaling journey, but that does not mean it was used intentionally. It was the influence of individual staff members, working diligently with – and sometimes against – one another that provided the creative tension and energy that led to The Cares Family's rapid growth. Board members, local people, partners and funders all encouraged that growth, but the growth itself came from the energy and at the immense personal cost of a small group of people who made it happen.
- While The Cares Family's scaling occurred without a framework, its experience of growth most closely resembles the 'grow an organisation to deliver' model: the group provides a structure and raises resources to build capacity to grow into new areas. Additional actions by key individuals, particularly the Chief Executive, may fall into other types of scaling. The Cares Family has, for example, used its local replication to develop influence and networks and this in turn has helped further local scaling – but the credibility of The Cares Family's thought leadership comes from its local programming alongside its national thought leadership. This underlines the need for funders to think about how they are incentivising organisations not only to invest in their back office or communications or operations for scaling, but also in their core community work.
- This iterative and ambitious approach to scaling has advantages and risks. The action first approach has led to a lot of learning for everyone involved. There is a need to acknowledge that the organisation is pushing boundaries, and to give everyone a break. In some ways, it is already doing this by developing a new strategy for the next five years that does not centre on further replication, but instead on driving societal systems and culture change. This mixed model – combining the entrepreneurial and disruptive with

more iterative changes in existing programmes operations – may help The Cares Family find the ‘disequilibrium’ its Founder is seeking.

- The way The Cares Family has scaled has created a number of tensions including a central versus local tension, a place versus programme tension, an entrepreneurial versus structured tension, and an informality versus accountability tension. Within these tensions lie more, smaller tensions. These are at the core of how The Cares Family works – they have always been there, and they are what makes it exciting to work for The Cares Family. But they are also what make some people move on from the organisation within three years. As the organisation continues to mature, it is not desirable to try and remove the tensions – but it should look to make them easier for the people who experience them.
- ‘Scale’ in the social sector is negotiated, not bought like a company might purchase market-share. It is done with stakeholders, not shareholders. The Cares Family’s example should highlight how personal, challenging, motivating, rewarding and inspiring building social movements can be. It should not be taken on lightly, but the combination of framework and agility can show others how to think about scaling.

Finally, it is important to acknowledge that The Cares Family has already addressed some of the challenges described in this report and since the data was collected. For example, the appointment of a Managing Director in January 2020 has helped to bridge some of the gaps between the local branches and the national charity including more procedural clarity and HR support. In addition, since the outbreak of Covid-19, staff have felt more connected to the national organisation thanks to regular, remote all-team meetings which previously occurred in person only quarterly. The Cares Family’s adaptability, matched to manageability, is the foundation for the organisation to move to its next phase.

There remain, however, some inherent tensions on which it would be beneficial to find a balance which works for more people. It is therefore recommended that:



- The Cares Family should set out clearly which parts of the model is replicable, and which can be adapted and developed by local areas. In this exercise, it is key to investigate what it is about the model that drives The Cares Family’s impact – for example, is it the local variations, is it the people, or is it the central structure? We think this report and other

research and evaluations give lots of evidence for this, but it is important that distinctions are agreed collectively to build confidence amongst the teams, and also enable clearer management and communications (internally and externally). [Step 1]

- Once the drivers for impact are identified and agreed, it is recommended that the senior leadership team **reviews the organisational structure** around these drivers and makes it clearer what type of structure would support the work, including in terms of budgets, fundraising, decision making and language. This should include **making explicit what needs to be centrally managed and what needs to be locally led**. [Step 2]
- It is recommended that The Cares Family trustees and senior staff build from these two steps to **review the governance of the whole organisation**. This may result in a need to rethink and reorganise governance to better enable and support the impact defined in Step 1, and the structures agreed in Step 2. There is a temptation to jump to governance review first, but we strongly recommend being crystal clear on the functions that drive impact work, before shifting the organisation's form. [Step 3]
- Finally, The Cares Family should to **continue to build on their ongoing work on improving processes, policies and procedures** to give the staff the support system they need to deal with the emotional work they undertake. This could include reviewing the appraisal cycles, pay, bonuses and the possibility of offering sabbaticals or secondments to employees who wish to gain experience elsewhere. [Ongoing]

More generally, it is recommended that The Cares Family consults the list below when and if they scale again. The checklist is based on staff and board members' responses to the question, 'what are the key ingredients to successful scaling of The Cares Family?' The list below contains the main themes identified in the data.

Key ingredients for successful scaling: A checklist

- ✓ **Being flexible:** There is a need to be flexible to the approach and to develop timelines to ensure plans are achievable and sustainable for everyone.
- ✓ **Learning by doing:** Having enough time between opening new branches is key in order to learn and improve the processes.
- ✓ **Forging local connections, combined with building knowledge about The Cares Family model:** Having the branding in place, as well as local connections, is key to success. In addition, the staff and board teams need to represent the communities they work in.
- ✓ **Creating clear internal communications:** Taking the team on a journey and getting their buy-in to changes is key to help them feel included and excited about the work that is ahead.
- ✓ **Researching thoroughly beforehand:** Undertaking thorough research showing that The Cares Family model is needed and welcomed in that specific area is crucial – there is a need to understand which similar services exist in the area, and where there are



gaps that The Cares Family could potentially fill. Some felt that this period of research and partnership-building should be at least three months so that *'when you've done that you can hit the ground and run'*.

- ✓ **Putting clearer HR, policies and procedures in place:** Investing in internal capabilities to make sure the organisation can handle new unforeseen challenges is absolutely key – these investments should be on both an operational level and non-executive level.
- ✓ **Building management structure:** Having a member of the Senior Management Team based in each branch ensures that local teams have the support they need. In particular, ensuring that each charity has an experienced full time manager in post is key for the security of the rest of the teams.
- ✓ **Developing staff wellbeing:** Striking the balance between challenging and encouraging staff to grow whilst respecting their unique sense of wellbeing is important. There need to be development opportunities so that people can grow and make use of their knowledge.
- ✓ **Recruitment:** Auditing and seeking the skills, local knowledge and experience that mixed, balanced teams need as well as being clear what roles entail including on lone working and long hours. In particular ensuring a team of different skills and experience – diverse in race, class, gender and age so that cliques do not form and dominate culture.
- ✓ **Diverse funding streams led by programmes:** Having enough funding is key to making sure there is room for unexpected challenges. One thing that came through in the interviews was the idea of having more unrestricted funding to hire for versatility. Some felt that the programmes teams should decide how they want to achieve impact within their programme framework and develop funding proposals from there.

Appendix: Timeline of key events

2010

May: The Cares Family's founder Alex met his neighbour Fred and took him for his first haircut in three months – the seed was planted for North London Cares (NLC).

2011

August: NLC was launched amid rioting, by mobilising young people to assist with the clean-up. Within hours 5,000 people had visited the website and Mayor of London Boris Johnson tweeted his gratitude for NLC's role in the post-riot narrative.

September: NLC began recruiting young professionals and matching them with older neighbours. This was the first step towards today's Love Your Neighbour programme.

December: NLC started its first Winter Wellbeing project, planting the seed for the future Outreach programme.

2012

March: NLC started a community resilience project in partnership with Islington Council and DEFRA, mapping older people's connections during warm weather.

April: NLC hosted its very first social club – a film night in Holloway.

End of the year: A young graduate asked, 'why is there no South London Cares?' at an event where The Cares Family's founder, Alex Smith, spoke about NLC.

2013

Beginning of the year: The London Community Foundation asked if NLC would consider running programmes in south London.

Throughout the year: NLC diversified its film nights into a wider Social Clubs offer.

September: Alex and the board (at that point four trustees) agreed on the value of creating South London Cares (SLC). The Cares Family's former Chair was based in south London and was a driving force in these discussions.

31 October: South London Cares was registered.

Autumn:

- SLC raised £10k from the London Community Foundation, £10k from a major donor, and £10k from a council community fund to get SLC off the ground.

- Meanwhile, NLC considered the value of raising smaller donations from within its networks through community fundraising.

24 December: Alex submitted a proposal to Nesta to increase investment in the replication of the model and to build a more sustainable income stream.

2014

First half of the year: Alex worked with Nesta to develop the plans for SLC.

June: Nesta agreed to grant SLC £131k through their Centre for Social Action Innovation Fund.

Summer: The first two members of SLC's staff were hired.

August: SLC started operations in Southwark and Lambeth.

October: NLC published its first major impact evaluation, funded by Esmee Fairbairn Foundation. The report stretched to 130-pages of data and stories about the value of the model.

2015

January: SLC started to deliver its first Winter Wellbeing project.

February: With the hire of a Development Coordinator, NLC and SLC started raising money through nascent supporter-driven fundraising.

May: SLC's Love Your Neighbour scheme made 15 new matches.

Throughout the year: SLC took off quickly. The two charities' joint profile grew with a Centre for Social Justice Award, recognition in the Evening Standard's 1,000 most Influential Londoners Awards, and coverage in The Times, The Guardian and on BBC1.

End of the year:

- Nesta invited NLC/SLC to be part of the first phase of its Accelerating Ideas investment. 'The Cares Network' started to explore whether it could replicate further.

- The board and Alex discussed the possibility of further scaling and raising sustainable income. With an initial investment of £15k from Nesta, different options were appraised.

December: A full proposal to Nesta's Accelerating Ideas Fund was submitted, with no specification on the future locations of possible 'Cares 3' and Cares 4' branches.

2016

Spring: The Accelerating Ideas investment was confirmed.

Summer: The Cares Family Limited is registered as an umbrella organisation for the group.

September: Two new fundraisers were hired for NLC and SLC, driving further income generation in the existing two branches and freeing up senior staff to focus on scaling.

October: The Cares Family's second evaluation report was published, further demonstrating the impact of the model.

December: A scoping paper was completed by volunteers from Deloitte. From a long-list of 13 possible new locations, the paper identified east London, Manchester, Liverpool and Birmingham as locations that would most benefit from The Cares Family's model. East London was not an option in the funding partnership, however.

2017

Winter: Alex built relationships with local Councils and community groups in Manchester, Liverpool and Birmingham.

February: Based on various reports and support from local authorities, the board agreed on the creation of Manchester Cares and Liverpool Cares. A new Director of Operations was hired (internal appointment).

Summer: The Cares Family recruited a Head of Programmes to Manchester Cares.

October: MCR Cares Limited was registered.

November: With one member of staff, Manchester Cares (MC) started operations.

2018

Winter:

- MC delivered its first Winter Wellbeing project and first social clubs.
- Liverpool Cares was registered.

April: Alex is announced as an inaugural Obama Fellow.

July: A third evaluation of NLC and SLC started.

October: To share knowledge across the group, SLC's former Head of Programmes became Head of Programmes for the Northwest (both Manchester Cares and Liverpool Cares). Liverpool Cares started operations. The Prime Minister announces the world's first ever government loneliness strategy at a Cares Family event.

2019

January: The Cares Family secures money from the Building Connections Fund and The Mercers' Company to create East London Cares.

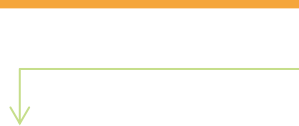
April: The Head of Programmes (Northwest) is appointed to lead the new East London Cares, with new dedicated Head of Programmes roles created for Manchester Cares and Liverpool Cares.

May: Two further new fundraising roles are created, in addition to a Head of Development hired at the end of 2018.

Summer: East London Cares' Head of Programmes takes time to plan and recruit programmes staff, before taking a two-month sabbatical. Meanwhile, the Chair, in post since 2013 and who had driven much of the scaling, departs.

September: East London Cares' programmes team starts in post.

Throughout the year: Leadership support is brought in to support the Founder/CEO to expand The Cares Family's thinking around its future strategy and mission.



2020

January: The new Managing Director is brought in to better operationalise the much-grown Cares Family.

Winter: Two new trustees are brought in to support governance development. The Cares Family's first new project under its expanded vision, '3G Social Clubs', gets underway.

March: The Cares Family suspends face-to-face programming due to Covid-19. It quickly re-invents all programmes and commits to making the biggest different possible during national and international crisis, raising £1m in new investment to do so.

Summer: A Director of Projects and Head of Communications are appointed, and new programmes and projects positions are created to help The Cares Family meet a new moment of potential.

Autumn: New projects under the expanded vision will begin to take shape under the Director of Projects.