

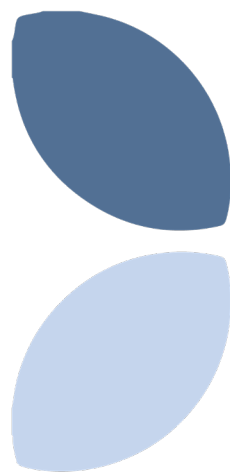
Consultancy Services

*A CAIS Social Enterprises
Brochure*



CAIS

social enterprises
mentrau cymdeithasol



CAIS

social enterprises
mentrau cymdeithasol

www.adferiad.org/CSE

Cais Social Enterprises is a trading
subsidiary of Adfeirad, a charitable
incorporated organisation.

Registered Number: 06354260

Contents

Introduction

Consultancy services	3
----------------------	---

How can we help?

Health checks/diagnosis	6
Bespoke business services	6
1. Strategic Planning	6
2. Governance	7
3. Marketing	7
4. Business Development and Building Effective Partnerships	7
5. Financial Management	8
6. Data Monitoring and Reporting	8
7. Data Protection Legislation and Information Governance	9
8. Estates Management / Health and Safety	10

Operational Consultancy Services

1. TUPE Consultancy	11
2. Mobilisation of new services	11
3. Regulated services (CIW, SCW, HIW, CQC) consultancy	13
4...Developing appropriate and compliant training programmes	14
5. Cultural competence training	14

Consultancy Services



As a charity, effective governance is crucial, to ensure accountability, transparency, and responsible management, thereby safeguarding your mission, reputation, and impact. By adopting efficient strategies, charities can maximise their influence and drive positive change within their communities.

Our multidisciplinary team of professional business and operational consultants bring together decades of experience and specialised knowledge in their relative specific field of expertise, having worked in the public, private and third sectors, thereby ensuring our services are tailored to meet the diverse needs of our clients.

We understand that each organisation is unique, which is why our consultancy services are designed to be flexible and adaptable, providing bespoke solutions that align precisely with your objectives. Whilst not limited to these specific areas of work, our team of consultants can deliver tailored pieces of work, based on your needs, including:

Business Services

- Policy Development
- Training Design and Consultancy
- Leadership & Management Development
- Audits & Compliance
- Investigations
- Secret Shopper Engagements

Operational Services

- Mobilisation of new services
- TUPE staff consultations and integration of teams
- Care Inspectorate Wales – pre-inspection audit & recommendations





How can we help?

Health Checks / Diagnostics

As the name suggests, this is an evaluation of your organisation's current wellbeing. By undertaking an organisational assessment, we will advise on your operational effectiveness and make recommendations to help you make appropriate short- and long-term development plans. The assessment typically includes aspects such as financial stability, compliance, and governance practices.

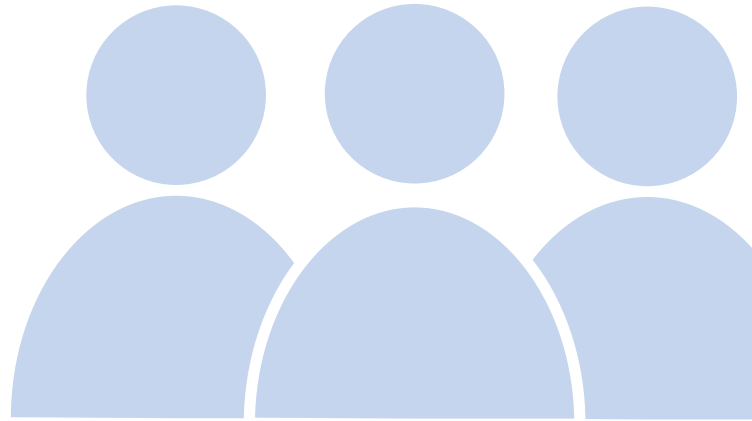
Bespoke Business Services

Effective strategic planning will play a vital role in helping your charity with the expertise, resources and support needed, to enhance your organisational capacity, expand your reach and achieve your mission more effectively.

We can assist with the following business activities:

1. Strategic planning

We recognise that every organisation is different so depending on your needs, we can work with you to develop bespoke practical strategic and operation plans. These will align with your



mission, organisational goals and available resources, including identifying growth opportunities, defining objectives and outlining actionable steps to achieve them.

Depending on the size and complexity of your charity, this support may be delivered via a facilitated away day with follow up summary report, or over a longer timescale, which will include stakeholder engagement, discussions with key personnel and the preparation of a full strategic plan.

Ongoing financial challenges inevitably lead to considerations of cost savings and often re-structuring of resources and teams. Our consultants can constructively advise on options to consider and provide guidance through a period of change management.



2. Governance

Our consultants can help overcome the challenges of regulatory governance. Our tailored consultancy services can undertake a comprehensive governance review, examining your board's effectiveness, ranging from ensuring compliance with Charity Commission and other relevant laws, to risk management and decision making.

We can support in the development of effective policies which will ensure transparency, consistency and compliance with legal requirements, ultimately contributing to your charity's reputation.

3. Marketing

Marketing is vital for small charities as it enhances your visibility, facilitates fundraising efforts and enables advocacy for your cause. It is a powerful tool to amplify your voice, reach target audiences and make a meaningful difference in your community.

Our consultants can help develop your brand identity, messaging and marketing strategies to effectively communicate your mission and attract support, by designing promotional material and logos, and optimizing your digital presence.

4. Business development and building effective partnerships

Securing funding is essential for the sustainability and growth of all third sector organisations. It enables you to expand your reach, increase your impact and address the social needs within your community.

Our business development experts can help with strategy development to identify suitable funding opportunities for your charity and provide guidance and support on completing the necessary applications and maximising income generation opportunities.

Collaborating with like-minded organisations offers opportunities to pool resources, access expertise and extend reach, leading to increased impact and sustainability.

Our consultants can help you identify and cultivate meaningful and beneficial partnerships, to enhance your credibility and enable innovative working and collaboration on joint initiatives.

5. Financial Management

Financial management is vital for small charities as it ensures the efficient use of limited resources, transparency, and accountability. It aids strategic decisions and mitigates financial risks, ensures compliance, and builds confidence in the organisation.

Our consultants can offer tailored support depending on the individual needs of your charity, ranging from an overview of and recommendations relating to your current system and processes, through to budgeting, cash management and reporting of financial information to a range of stakeholders.

6. Data Monitoring and Reporting

Whether used to inform internal or external stakeholders, data monitoring and reporting is essential for charities to demonstrate impact, ensure accountability and drive continuous improvement.

We can work with you to evaluate current system needs and provide advice and guidance on any development of robust systems, which will enable you to collect and analyse data, whilst managing risks and meeting regulatory requirements. We can design and offer training in dashboard tools, including PowerBI.



7. Data Protection Legislation & Information Governance

The Data Protection Act 2018 & the accompanying UK General Data Protection Regulation is crucial for charities as it ensures the ethical and legal handling of personal data.

We can support by developing bespoke policies and procedures that ensure your charity handles personal data ethically and in full compliance with all relevant Data Protection legislation for your charity, as well as provide staff training. Our consultants will support you with incident response planning, data subject rights requests and ongoing compliance monitoring. Our goal is to equip your team with the knowledge and tools needed to safeguard sensitive information effectively.

We offer comprehensive staff training sessions that go beyond basic compliance, empowering your employees to become data protection champions within your organisation.

Our experienced consultants will guide you through incident response planning, ensuring you're prepared to address data breaches swiftly and confidently. We'll also streamline the management of data subject rights requests, demonstrating

your commitment to respecting individuals' privacy rights.

We also offer ongoing compliance monitoring, so that your charity remains up to date with the latest regulatory requirements, giving peace of mind and bolstering trust amongst your stakeholders.



“Everything was covered into very good detail on the course which led to a lot of useful information being learnt”

8. Estates Management / Health & Safety

Effective estates management is vital for small charities to optimise resources, minimise costs, protect assets and ensure compliance, thereby ensuring they can maximise their impact and achieve their mission.

Our consultants can advise and assist you to evaluate your existing property assets to identify strengths and weaknesses and opportunities for improvement, including a compliance and risk management strategy to ensure the charity meets its regulatory requirements, health and safety standards, thereby reducing the risk of legal issues.



Operational Consultancy Services

Our consultancy services within the care sector offer tailored solutions to enhance operational efficiency, elevate service quality, and ensure regulatory compliance. With a deep understanding of the unique challenges facing care providers, we provide expert guidance in areas such as staff training, risk management, and organizational development. Our proven track record in implementing best practices and innovative strategies empowers care organisations to thrive in an ever-evolving landscape while prioritizing the well-being and safety of those they serve. Let us partner with you to unlock the full potential of your care services and make a lasting difference in the lives of individuals and communities.

1. TUPE Consultations

TUPE (Transfer of Undertakings Protection of Employment Transfer of Undertakings (Protection of Employment) Regulations 2006, as amended 2014) situations can be challenging, involving complex legal requirements and regulations. Our consultants can provide expertise by ensuring

compliance, to minimise the risks associated with the transfer of staff. They will facilitate transparent communication between all parties involved, helping to alleviate concerns and maintain morale throughout the process. Ultimately their support will enable your organisation to navigate TUPE consultations smoothly, fostering positive relationships and promoting a successful transition for all stakeholders.

2. Mobilisation of new services

Mobilising new services can be challenging. Firstly, there may be resistance to change, requiring effective communication and training, followed by logistical hurdles, ensuring an appropriate infrastructure is in place to ensure a safe and smooth transition. Moreover, navigating regulatory requirements and compliance standards can be complex and time consuming, requiring thorough planning and co-ordination.



Our consultants can help navigate these challenges, by providing expertise in change management, logistical planning and regulatory compliance. Offering tailored solutions, we will facilitate stakeholder engagement and provide guidance throughout the whole implementation process, ensuring a smooth transition and successful launch of the new service.

3. Regulated Services (CIW, SCW, HIW, CQC) Consultancy

Our expert consultants can ensure your business stays up to date with the latest regulations and tailor specific solutions to assist your business with remaining compliant.

We offer pre-inspection audits and can assist you with mitigating potential risks and protecting you

from possible penalties and reputational damage.

Firstly, a comprehensive evaluation of current practices will be carried out, identifying areas for improvement, and ensuring readiness for regulatory inspections. By proactively addressing any issues uncovered during the audit, you will mitigate risks and enhance compliance, ultimately avoiding potential penalties or negative outcomes during official inspections. Additionally, a pre-inspection audit demonstrates a commitment to quality assurance and transparency, instilling confidence in stakeholders such as clients, families, and regulatory bodies.



4. Developing appropriate and compliant training programmes

Our consultants can assist in developing a compliant training program for individuals within your organisation, a team of staff working within a particular service or those within a cohort seeking development, as future leaders. We will conduct a thorough assessment to identify the training needs, design tailored programs that meet regulatory standards, and which will enhance the quality of service being provided by the staff. Additionally, they can provide support in implementing training initiatives, such as delivering workshops or facilitating online courses, to enhance staff engagement and knowledge retention.

5. Cultural Competence Training

Essential for fostering understanding and respect across diverse communities, this training will equip individuals with the skills to communicate effectively, challenge stereotypes and tailor services to meet diverse needs. Cultural competence training promotes inclusivity, builds trust and fosters diversity and innovation in the workplace and is indispensable for creating a more inclusive and equitable society, where everyone feels valued and respected.



www.adferiad.org/CSE

Cais Social Enterprises is a trading
subsidiary of Adfeirad, a charitable
incorporated organisation.

Registered Number: 06354260



Contact us

Ready to embark on a transformative journey with Adferiad Consultancy?

Get in touch with us today to learn more about how we can support your organisation. Together, let's unlock the potential for positive change and make a lasting impact on the lives of those we serve.

For further information, please contact us through the details below:



www.adferiad.org/CSE



Tŷ Dafydd Alun, 36
Princes Drive, Colwyn
Bay, Conwy, LL29 8LA



01492 863000