

CASE STUDY

How examining the needs of their staff and customers has enabled the Plunkett Foundation to improve the support it provides to existing community owned shops.

The Plunkett Foundation and the I-SEE project



The Plunkett foundation, founded in 1919, helps rural communities, through community-ownership, to take control of what is important to them. An established area of their work is the development and representation of community-owned shops, which is achieved through a Central Support team and an external network of nine Community Retail Advisers (the Advisors).

In light of the recent growth in the number of community-owned shops trading, the Plunkett Foundation recognised that, in addition to the support provided to emerging shops, there was a need to improve and increase the support they offered to *established* shops. The Rural Retail Skills I-SEE project was therefore launched in July 2009 to do just this. Through funding from the Big Lottery, the project aims to improve the level of service provided by its Community Retail Advisers and Central Support team, and by developing a toolkit of practical resources.

Initial findings

The first activity of the project was a scoping exercise. This assessed the needs of established shops, as well as the training priorities of the Retail Advisers and Central Support team to enable them to meet these needs. This involved the collation of research, visits to shops and consultations with both Plunkett staff and Community Retail Advisers.



This was a very valuable exercise: “We found that many shops were struggling with the same issues and concerns, but neglected to turn to other community shops or the Plunkett Foundation for support. Furthermore, many were focused primarily on day to day efforts to safeguard their shop from closure, without consideration of the longer term inputs required to help them to develop and thrive.” (James Alcock, Plunkett Foundation). A positive discovery though was that the existing Advice Sheets produced by the Plunkett Foundation were in widespread use, and were regarded as useful and comprehensive.

Consultations with Plunkett staff revealed that the main barrier to providing support to established shops was the Advisors’ original job descriptions. These focused on the objective of supporting *new* community shops –resulting in Advisors prioritising these over established shops. It was therefore identified that the Advisors’ aims, objectives and management framework needed to be updated. In addition, it was considered that by facilitating peer-to-peer support between shops and promoting the use of alternative social enterprise development programmes provided by the Plunkett Foundation, the capacity of the Advisors could be further increased . This would then allow them to spend more time with the established shops . The Advisors welcomed the training and new tools and agreed that the changes would enable them to improve the service they deliver.

Beginning the changes

Updating the existing Advice Sheets commenced immediately; information was brought up-to-date and live links were added to other valuable sources of information and legalisation. Revisions included a language shift to include a greater focus on profit generation and sustainability. They also included the insertions of practical documents and



templates to promote peer to peer learning and shared good practice -specifically those already in use by community owned shops such as: business plans, volunteer rotas, job descriptions and profit margin guidelines.

In training the Community Retail Advisers and Central Support team, it was important to consult with them to assess the exact details of their needs and ensure the subsequent changes were appropriate. Two workshop days provided the setting for this.

The first of these sessions covered the importance of shifting the focus of support: encouraging them to strive for profitability, not just survival. The day then went on to review the skills and expertise of the Advisers as well as an analysis of the time spent with shops. Training was also provided on a new online network, designed for peer-to-peer support and networking. The day proved a great success. As well as further confirming the need for the Plunkett Foundation to improve its service, the day pointed to the need for a new diagnostic tool: “to help advisers structure their visits to existing shops; to help them identify the problems and weaknesses that impact on profitability.” (James Alcock, Plunkett Foundation).

KEY LEARNING :

“The Importance of making use of staff and advisors’ existing knowledge and expertise when considering a change in direction, and an appreciation of the time needed for this.”

James Alcock, Plunkett Foundation

Developing the new diagnostic tool

Having established the need for a diagnostic tool, the development of it commenced. The resulting new tool aims to increase Advisers’ confidence when visiting established shops. It provides structure to visits and is designed to identify the specific support needs of a particular shop and then feed this back to the Central Support Team at Plunkett – placing less pressure on the Advisers’ to determine issues on site. The tool now allows the Advisers to visit many different shops, regardless of their specific expertise. It also identifies other support services such as the Online Shop Network, Central Support and other Plunkett projects. The tool therefore not only benefits the Advisers, but subsequently the shops themselves.

Introducing new tools

The new diagnostic tool and the updated Advice sheets were introduced to the Advisers at the second workshop event. A discussion on the latest proposed changes to the Adviser framework and management also took place on this day.

The Advisers welcomed the new diagnostic tool and improved Advice Sheets. They also accepted that the proposed role changes were needed to enable them to commit more time to established shops. However there were concerns on their practical capacity to maintain contact with such an increased number of shops. In anticipation of such concerns, one Adviser had been asked to test another potential new tool; one that would overcome such issues. This tool was the Annual Community Shop Review. The Review had already been piloted in Yorkshire and is an annual survey of community shops which establishes their ‘health’. Through this survey, shops that are struggling and in need of special support are highlighted and can then be focused on. This removes the need to make unnecessary visits and frees up time for those shops that need it most. It also acts as a regular reminder to the shops that the Plunkett Foundation is there to provide the ongoing support that they need.

Improved future support and the remainder of the project

The project has made great progress in its first year: the Advice Sheets have been updated and will be available in July 2010; a new framework is in place for the Community Retail Advisers ; a new diagnostic and survey tool has been created to support the longer term sustainability of all community shops; and an online network(www.plunkett.uk.net) populated with practical resources and templates has been created. The Annual Community Shop Review will also soon be trialed by all Retail Advisers with shops in their areas, as will the diagnostic tool.

The work, although initially designed for established shops, will also benefit start-ups as a strong infrastructure is now being developed to support them as they mature and grow.



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