

## **August 2015**

Caplor Horizons worked with the CB and HH Taylor Trust to help develop its future strategy in mid-2015.

The CB and HH Taylor Trust is one of the Quaker Family Trusts. All 7 current trustees are second and third generation after the Founders, who established the Trust in the 1940s. Since four of the second generation trustees are moving into their 80s it was essential to begin to plan how to hand on the responsibility of running the trust.

Caplor Horizons was chosen because Ian Williams was already known to some of us. We decided that we needed an independent and impartial facilitator to help us begin the process and this was the first day of its kind. I worked closely with Ian Williams to design a day-long session with trustees about the future.

In advance of the Strategy Day, Rupert Cadbury (Philanthropy Advisor, Caplor Horizons) prepared a most valuable and helpful paper about the challenges faced by family foundations. This was circulated to trustees in preparation.

Ian Williams and Lorna Pearcey facilitated the day and followed through afterwards.

We had an excellent and most productive engagement with Caplor Horizons with a much more positive outcome than if we had tried to tackle a future strategy on our own.

Clare Norton,  
Trustee and administrator  
The CB and HH Taylor Trust.