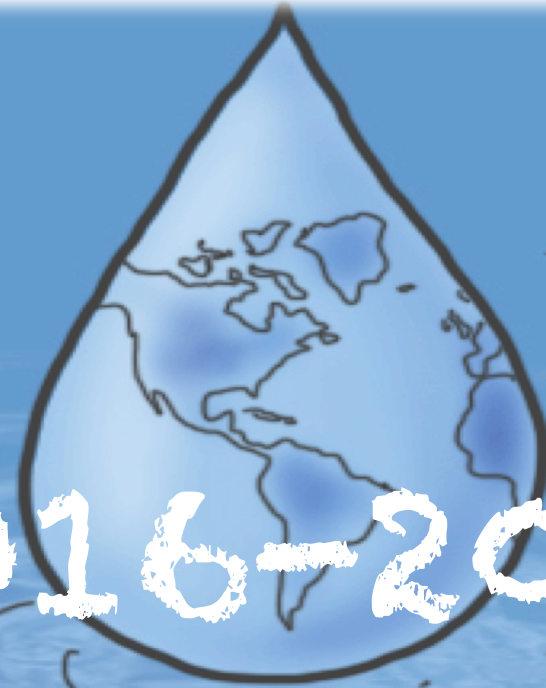




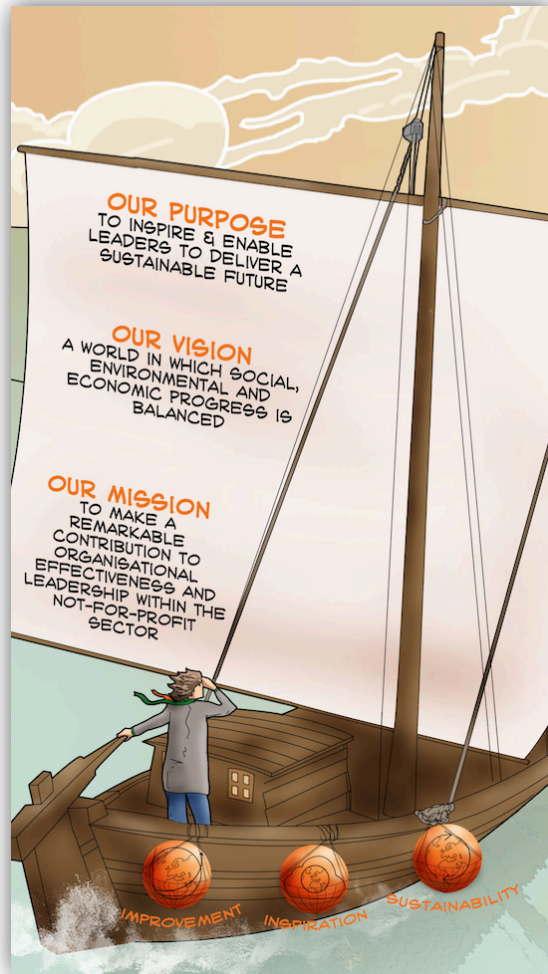
CaplorHorizons

Impact 2016-2017



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Impact Report 2016-2017



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Our Values



Uniting people and ideas to create a fairer future for all



Contributing to positive change, whatever our role and whoever we are



Learning, reflecting and developing together

Our Beliefs

Learning should be fun

We are all learners on our voyage

We are always open to ideas from different sources

We have the people, the experience and the blueprint to inspire change

Our approach is always positive and flexible

Sustainable development is enabled through creativity

Strong collaborations achieve a greater impact

No challenge is insurmountable

We develop our abilities by building on our strengths

A safe harbour for learning is fundamental to successful progress

We can all be leaders

Everyone matters

INTRODUCTION



Dr Ian Williams
Executive Director

This is now our third Impact Report and I would like to take the opportunity to thank everyone involved with our organisation for all their very important contributions.

I'm pleased to report that, during 2016-2017, we have either achieved (*or improved on*) the majority of goals that we set ourselves. This is due to the hard work of many people – we have enthusiastic, motivated staff; we have a dedicated, highly capable Board; and we have a growing number of committed, extremely talented Advisors.

Looking back at how things have changed, grown and developed over the past year, three key elements stand out that encapsulate our journey:

Firstly, the breadth and depth of the resources that we have developed over the past 12 months is incomparable to a year ago. All of these, in line with our stated mission, are freely available to either read or download from the Resources section of the Forum.

From finalising and implementing the *Caplor House Essentials Programme* to our extensive range of insightful and accessible papers and videos, we now have many high quality and diverse resources that can support our clients across a distinct collection of topics.

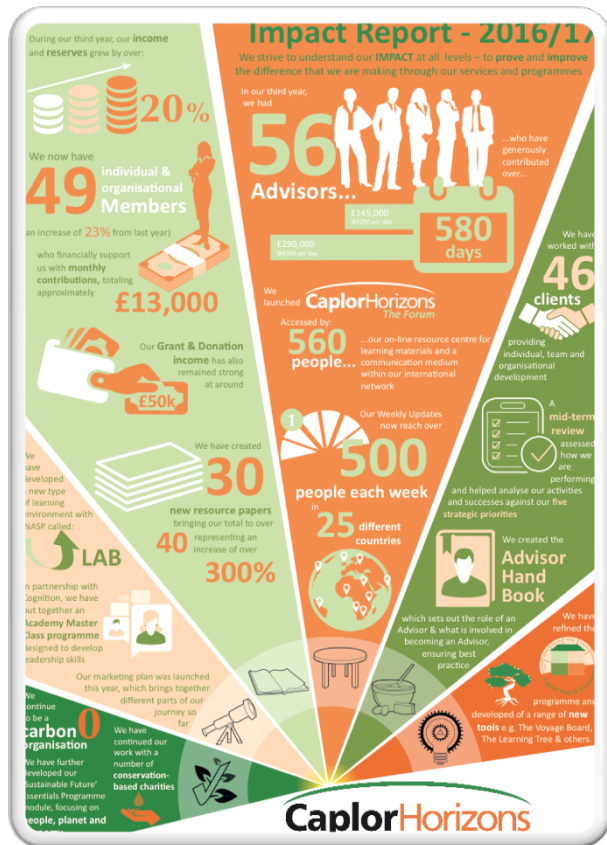
Secondly, the increased level of influence that we have achieved through strategic collaborative partnerships.

Our work and voice now reaches a widespread audience through time spent with clients who operate as umbrella or membership organisations, and also our involvement in 3 different collaborative speaking events, which has given us a voice on national stages in both the UK and Ireland.

Thirdly, the retention of remarkable people within our Advisor 'Talent Team'.

Over the past year, our number of Advisors has steadily increased to **56**, collectively contributing over **580** days of their time. This increase is not only the result of our growing network, but also because not one of our Advisors has stopped giving their time and sharing their expertise.

Maintaining active and productive relationships with this group of knowledgeable and dedicated people has always been at the heart of how we work and this will continue as we grow.



We are proud of our achievements and measuring our impact allows us to celebrate these. More importantly, however, this review allows us to learn from our past actions and develop our goals as we drive forward.

As with any organisation that is rapidly developing, it hasn't all been plain sailing over the past year and, from conducting our mid-term strategy review in October 2016, we were able to articulate our greatest challenges:

- (1) Ensuring that all key relationships remain as positive and effective as they can be;
- (2) Balancing working 'in the business' with working 'on the business'; and
- (3) Focusing on *all* of our strategic priorities, not just the majority.

Our learning, from the above, is that that we need to keep embedding our culture, keep up momentum on achieving practical results, and keep our concentration on delivering all five of our strategic priorities.

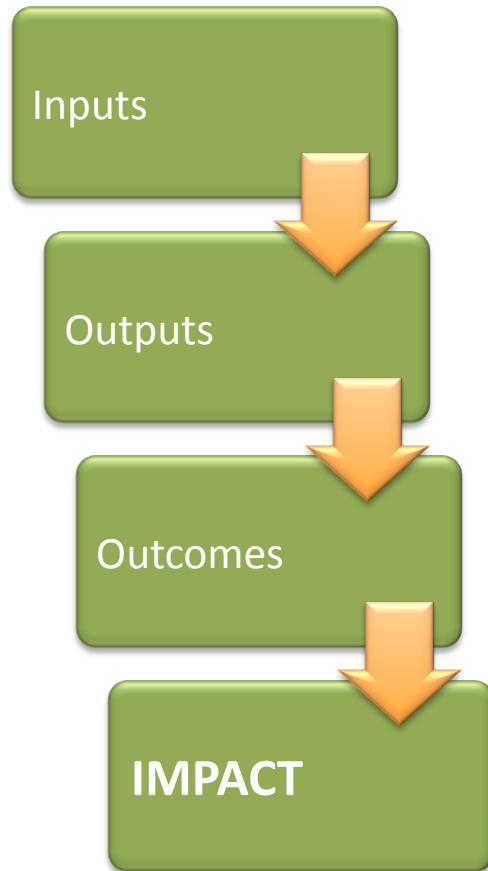
We will apply this learning by working together – as Advisors, trustees and staff – to serve our clients and contribute to a purpose that is bigger than ourselves. As Charles Handy puts it, we will aim to *“do the best, at what we are best at, for the benefit of others”*.

We believe that if we keep learning and we remain open to new ideas, then we will inspire more confidence, attract more resources and enable more people to connect with our purpose.

The priority going forward is to continue to make the biggest impact.



OVERVIEW

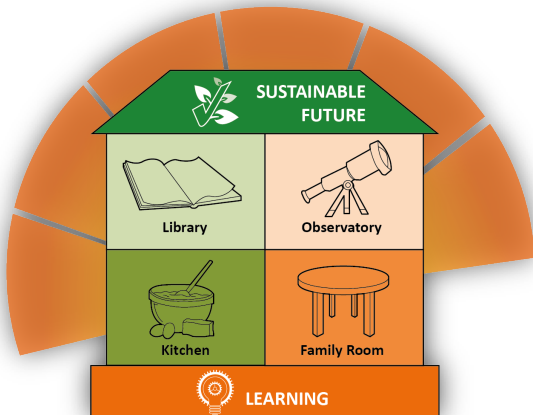
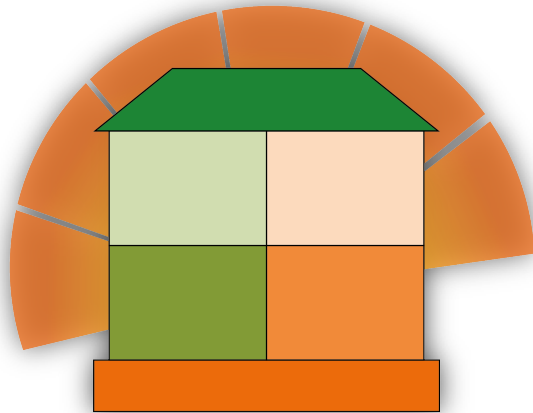


This report focuses on key aspects of our activities over the past 12 months. Essentially, we review our:

- Inputs** The resources contributed, notably the time of our staff, our board and our Advisors, as well as the financial contributions from our members and the Trusts and Foundations who support us.
- Outputs** Specifics about the number of clients that we have helped, the services that we have provided, the successful collaborations that we have initiated, and the programmes that we have delivered.
- Outcomes** Changes, as a result of our service delivery, that have positively affected individuals, teams and organisations; programme participants and clients; our partners and the wider Caplor Community; and anyone else associated with our organisation.
- Impact** The broader impact that we are bringing about - step by step - as a result of our overall activities within our own community, society in general, and our efforts to help others and ourselves contribute towards a sustainable future.

This document has been kept deliberately short and relatively simple, as there are other papers available (*please ask!*) that provide far greater detail on many of the specific elements highlighted within.

REPORT RATIONALE



The work of Caplor Horizons is built around the three elements of Leadership, Strategy and Influence.

We are specialists in organisational effectiveness and we help individuals, teams and organisations to contribute to meaningful, positive and successful change in a challenging world.

We believe that anyone can go out into the world and make an impact on the things that matter, whatever their role and whoever they are.

We have our own model for learning – **The Caplor House**.

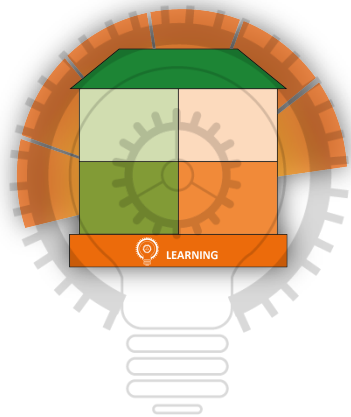
The metaphor of the house or home is universal. A home provides shelter, safety and a sense of belonging. At Caplor Horizons we use this powerful metaphor to represent all aspects of our work and bring them together within this single model.

For the purposes of this report, we are using the different parts of the House to represent the different elements of our activities and their on-going impact:

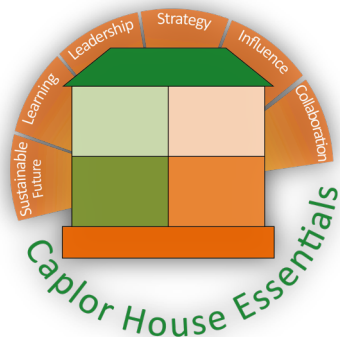
- *The House's solid foundations (which are based on the principles of effective life-long learning);*
- *The various rooms in the House (that allow us to understand our own thinking preferences and those of others); and*
- *The House's roof (which holds within it the understanding to enable a sustainable future).*

However, no parts of the House are 'silos', and we move freely between all areas. With this in mind, there is a natural 'overlap' between our activities and their impact in many of the different parts of the House.

THE CAPLOR HOUSE FOUNDATIONS



Learning



At Caplor Horizons, we try to build *learning* into everything that we do. We believe that effective life-long learning is based on five elements – creativity, critical curiosity, collaboration, consciousness and commitment.

Over the past 12 months we have been busy reinforcing our Foundations:

We have developed and refined our Essentials Programme, which draws on a number of research themes, academic paradigms and influential thinkers. An overview of the content for each module has now been created - with help from both staff and Advisors - and, in line with the strong identity that Caplor Horizons has already established, dedicated iconography for the Caplor House Essentials programme has also been developed. Professor Sharon Turnbull has written an introduction to every 'Essentials' module, each accompanied by a short video.

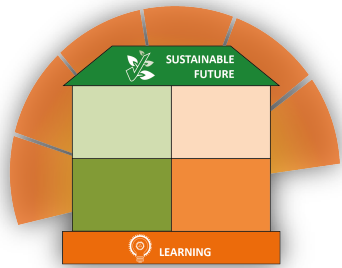
In addition to the Essentials Programme, we have explored and developed a range of new tools – The Voyage Board, The Learning Tree and various educational project games, all of which act as powerful opportunities for reflection and learning.

Specialists have written many additional papers, linked to our work, and all these documents are freely available to download from the Caplor Horizons Forum. Examples include *The Soul of Organisations*, *Volunteer Engagement Top Tips*, *Human Horizons – the world of inner brain dynamics*, and *The Caplor House*. Our thanks for these go to Professor Sharon Turnbull, Dan Bishop, Clive Hyland, Ann Alder and Dr Geoff Cox.

Through our work with INASP (a charity putting *research and knowledge at the heart of development*), we have also engaged with 'Theory U' – a change management method used to improve patterns of behaviour.

And, as part of our *Caplor Community Day* programme, we have studied (amongst other topics) *Unconscious Bias*, led by Chandra Ladwa & Saf Ghapson and *Neuroscience – People Insights*, led by Clive Hyland (a prominent author on the subject). These Caplor Community learning days provide an opportunity to discuss and reflect on a variety of topics that help to broaden our outlook and contribute to the development and effectiveness of our sector.

THE CAPLOR HOUSE ROOF



Sustainable
Future

The sheltering roof of the Caplor House holds within it the understanding to enable a Sustainable Future. At Caplor Horizons, we believe that this means working towards a world where social, environmental and economic progress is balanced.

Over the past 12 months we have spent considerable time on the roof:

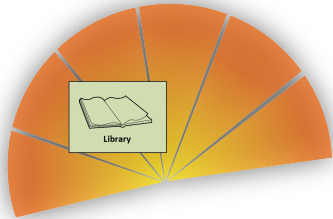
As with previous years, Co2 Balance has included Caplor Horizons in its wider *offset programme*, which means that we remain a Carbon Zero organisation.

We have further developed our 'Sustainable Future' module, within the *Caplor House Essentials* programme, to consider many aspects of the triple bottom line – people, planet and economy. An element of this has been the design and implementation of a 'card game' exercise that focuses on the benefits that can be derived when social, environmental and economic progress is balanced. The next stage is to make this tool available on-line, via the Forum.

A core event, within our *Caplor Community Day* programme, was led by *vice-chair* Usha Ladwa-Thomas, and was based on *Equity and Equality as joint strategies to promote a greater global 'fairness'*. We believe that Equity is providing people with what they need to succeed. Equality, on the other hand, focuses on treating everyone the same way. However, our view is that fairness and social justice can only be achieved if everyone starts from the same place, with the appropriate resources to succeed.

We have worked with a number of *conservation-based* charities (e.g. the Marine Conservation Society) to improve their leadership, strategy and wider influence with government and society in general. Although we have a broad approach to helping bring about a sustainable future (by influencing leadership and strategy across a wide-ranging spectrum of organisations) it is good sometimes to work with charities that are *directly* involved with sustainability issues. As champions for marine wildlife protection, sustainable fisheries and clean seas and beaches, the Marine Conservation Society is one such company.

THE LIBRARY



Within the Library, we build rational arguments, seek evidence as well as test and prove hypotheses.

Our work in The Library over the past 12 months has included:

This Impact Report, which focuses on key aspects of our activities and their outcomes and impact over the past 12 months.

Analysis of our income, which is derived from three main income streams:

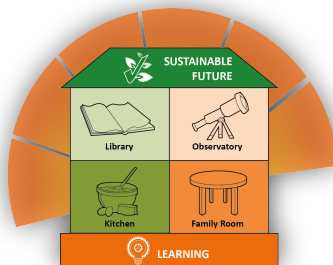
- (i) Our Services (75%),
- (ii) Our Membership, and
- (iii) Grants from Trusts, Foundations and Philanthropists.

This year our income and reserves have grown by a further **20%**.

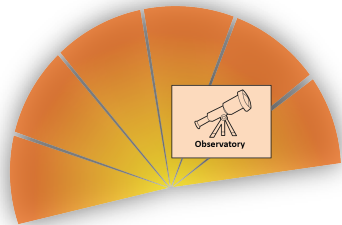
We now have **49** members who financially support us with monthly contributions, totaling approximately **£13,000** towards our cause.

Our Grant & Donation income has also remained strong at around **£50,000**. We are especially grateful to The Waterloo Foundation, The Oakdale Trust, The CB and HH Taylor Trust, the Cadbury Foundation and to Richard & Kay Harvey for their financial support.

30 new Papers have been created, as detailed in the 'Learning' section above. These are all (*over 40 in total*) available from the Resources section within the Forum – our web-based platform.



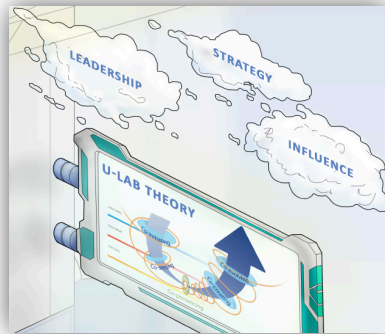
THE OBSERVATORY



The Observatory allows us to explore new possibilities, challenge assumptions and boundaries, and search for innovative ideas.

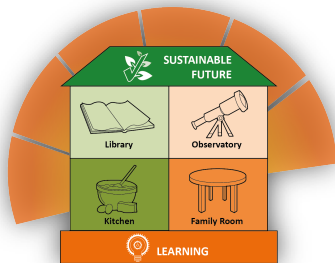
Our time in The Observatory over the past 12 months has included:

A collaboration with INASP (a charity putting *research and knowledge at the heart of development*) to form a **U-Lab** – a new type of learning environment that is personal, practical, relational, mindful, collective and transformative. Its purpose is to serve the current evolution of society (and self) by helping people to sense and actualize their highest future possibility, both individually and collectively. Using the U-Lab philosophy, we are working with INASP to strengthen the knowledge economies of Ghana, Kenya, Zimbabwe and Uganda by enabling access to cutting edge research from around the world.

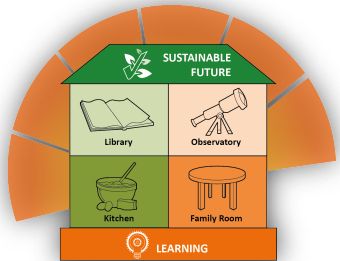
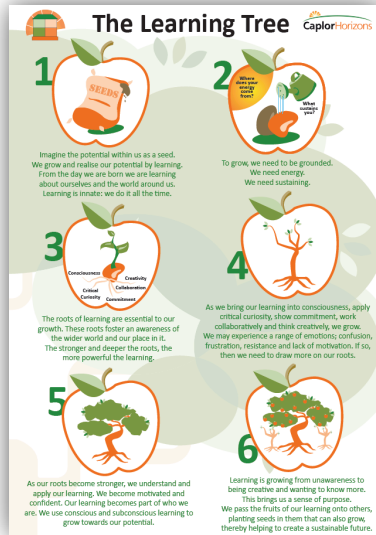
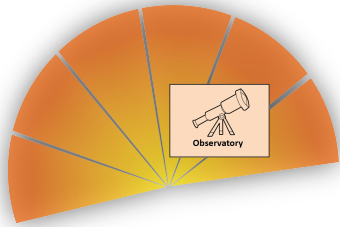


Inspired by Deepak Chopra's 'the Soul of Leadership', Professor Sharon Turnbull has written a paper called the 'Soul of Organisations'. In it she explores *The Cultural Web* – the stories, rituals, controls and structures that exist within an organisation and how all these elements impact on its culture and its purpose.

A dedicated group of Advisors and staff (including Dr Vicki Howe, Dr Geoff Cox, Ann Alder, Dr Ian Williams, Professor Sharon Turnbull, Clive Hyland, Dan Bishop, Jean Sellar and Lorna Pearcey) have been hard at work in the Observatory, discussing ideas and planning the development of the Caplor House Essentials Programme. The resource material that has been created represents a quality and depth that is truly outstanding and much of the material is now available through The Forum.



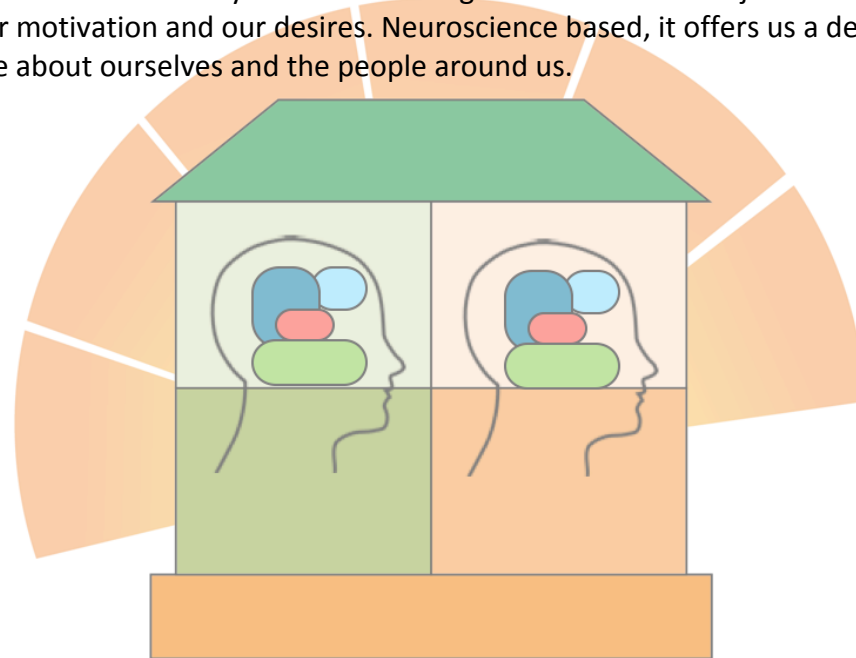
Collaboration has been high on our agenda, as one of our core beliefs is that strong collaborations achieve a greater impact. Building on our association with BOND and The Centre for Charity Effectiveness, we have also collaborated with Dochas and The Wheel – two highly influential umbrella bodies in Ireland. Charles Handy, the well-known social philosopher and management guru, gave a talk at the 2017 conference, whilst also (with his wife Liz) presenting an exhibition of her photos, taken for the Caplor Horizons booklet.



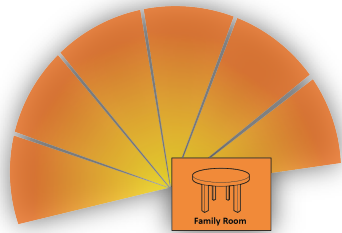
We have also, in partnership with Cognition, put together an *Academy Master Class* programme designed to develop leadership skills and build positive organisational cultures.

Our marketing plan was launched this year, which brings together different parts of our journey so far. It explains the thinking behind our purpose and why our values are so important to everything that we do. It highlights how the plan will support our five strategic priorities and how our key brand assets feed into our toolkit to support our objectives. And it recognises that to succeed we have to influence individuals, organisations and society, so that collectively and collaboratively we can address the complex sustainability challenges that the future holds for us all.

Human Horizons is another exciting initiative that has been developed in the Observatory. It explores the working of our personal inner world, our brain and its interaction with our body. Human Horizons offers us a way of understanding more about our subjective experience, our emotions, our motivation and our desires. Neuroscience based, it offers us a deeper way of learning more about ourselves and the people around us.



THE FAMILY ROOM



The Family Room is where we go to discuss, share and feel. We communicate with others and it's here that we formulate our values and beliefs.

Our work in The Family Room over the past 12 months has included:

The development of our formidable Talent Team. All our Advisors, staff and board members continue to show wonderful commitment and passion in their various types of engagement with Caplor Horizons. We now have **56** Advisors who have generously contributed over **580** days work. Our *Talent Team Engagement Review* concluded that our people felt valued and appreciated. They were excited about the future for Caplor Horizons and were eager to be involved as it moves forward. They were particularly positive about the sense of community and our common purpose.

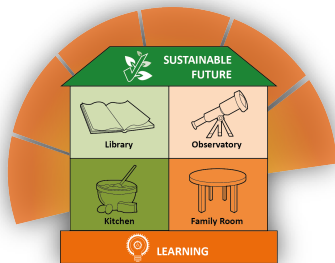
Our Caplor Community days. These are high energy, collaborative events (with both our Advisors and our wider network) focused on developing areas of our own organisation as well as continuing to discuss key issues that impact on *not-for-profit* effectiveness.

A new 'Values and Beliefs' statement, developed during a *Caplor Community Day*. The outcome can be found at the front of this document.

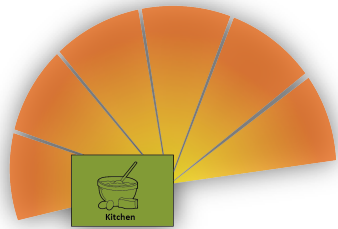
Our Weekly Updates that now reach around **500** people in **25** different countries. These keep our community continually updated with what is happening within the organisation, who we're currently working with, as well as links to further information and You Tube videos.

The launch of the Forum (accessed by **560** people in **10** different countries over the past few months) that is currently used as a resource centre for learning materials and informative papers, as well as a communication medium within our international network. However, going forwards, we are planning to innovate and prototype ways in which this tool can be used to reach and influence an increasing number of people across the globe.

Our Social Media campaign, led by Vanessa Bradbury, which includes regular contributions on Facebook, LinkedIn and Twitter to ensure that we continually add to global discussion on a broad range of topics that effect worldwide sustainability.



THE KITCHEN



The kitchen is the operational centre of the House. This is where plans are made, processes are developed and tasks are carried out.

Our work in The Kitchen over the past 12 months has included:

Engagement with **46** Clients, providing individual, team and organisational development. Activities included individual coaching and mentoring, improvement of team effectiveness, and development of organisational leadership, strategy and influence.

The implementation of bespoke services and client specific programmes focused on inspiring and enabling individuals and organisations to deliver a sustainable future.

The creation of specific resource material to support the above bespoke services and distinctive programmes.

A Mid term review - assessing how Caplor Horizons is performing, and analysing our activities and successes against our five strategic priorities:

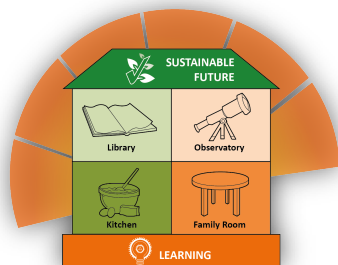
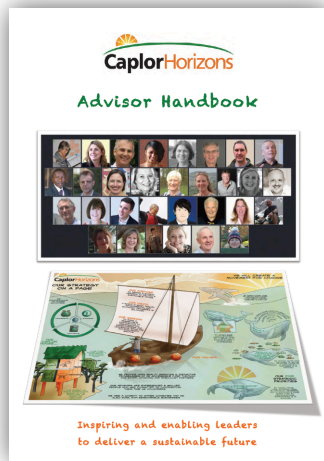
- (1) Develop a formidable Talent Team;
- (2) Design and deliver high quality, bespoke services and distinctive programmes;
- (3) Build a strong support base;
- (4) Improve impact; and
- (5) Develop the Forum

The development of a 'Reserves' Policy, detailing our organisation's financial sustainability.

The updating of our Governance Handbook, setting out our long-term direction, our policies, our legal requirements and our accountability.

The creation of an Advisor Handbook, which sets out the role of an Advisor, what is involved in becoming an Advisor and how to ensure best practice.

The design and implementation of a secure database, which brings together all key information.



ANNEX ONE



OUR CLIENTS INCLUDE...

New Clients

Charities

ICN (Inter Climate Network)

Vennture

Kent Union

All We Can

EAUC (Environmental Association of Universities & Colleges)

Rotary

INASP

Chrysalis

AGE Africa (Achieving Girls Education)

Valid Nutrition

Concern Universal (Malawi)

AfriNut

EIL (Experiment in international living)

Swan Advocacy

Mbale CAP (Coalition Against Poverty)

The Wheel

Businesses

Repairly

Cognition

Existing / On-going Clients

Charities

ERD (Edmund Rice Development)

Misean Cara

TechnoServe (Uganda & East Africa)

BOND

DAM (Dhaka Ahsania Mission)

Technoserve

AECB (Association for Environment

Dochas

Conscious Building)

Co2Balance

Marine Conservation Society

Money for Madagascar

Businesses

Haygrove

ANNEX TWO



INASP

"Caplor Horizons' programmes are a unique approach to understanding organisational leadership, management and culture and help to improve planning, strategy and performance. I found their presentations, exercises and techniques - such as the Caplor House model and "Seeing the Point" - engaging, easy to follow and enjoyable, whilst also providing profound and valuable insights and points of learning to support our way of thinking and doing things. The whole programme has been a real eye-opener for our strategic development, enabling us to establish a sharper purpose, vision, mission and objectives."



Co2Balance

"We collaborate with Caplor Horizons at a strategic level, including our joint efforts to be environmentally responsible organisations. Additionally, in early 2017, Caplor Horizons designed and delivered their latest leadership and team development session with us. This was excellent, consisting of very relevant learning conducted in an enjoyable, engaging and well-paced way."



REPAIRLY

"In November 2016, we invited Caplor Horizons into our office because we wanted to learn more about our true strengths as people, and hence what our strengths as a company were. We did exercises that gave us a deep insight into our personality types and led to deeper discussions about our wider 'company personality'. It was a truly informative and positive session."

WHAT OUR CLIENTS SAY ABOUT US...



MCS

"Our time with Caplor Horizons has been a wholly positive experience. Everyone has found working with Ian Williams and members of the Caplor Horizons team very energising and very productive."



AECB

"Caplor Horizons' contribution has been extremely helpful in a variety of ways that the AECB would not have otherwise had access to. The manner in which the Advisors share their experience and knowledge so generously for the good of others is also a great inspiration."



Haygrove

"A number of Caplor Horizons' resource papers, available on their Forum and written by highly experienced Advisors, have provided us with a fantastically powerful summary of the great work of some leading thinkers, expressed in a practical and accessible way. These papers, which are clear, brief and valuable, equip us with 'user guides' on a whole range of topics. I have no doubt that putting these fine documents together is a very time consuming task, and clearly done in a very thoughtful and careful way, and for that we are most grateful."



EAUC

"Over the last year we have been working intensely with Caplor Horizons on a new organisational vision and strategy. We now have an envisaged future to 2030 and a 5-year rolling strategy process. Caplor Horizons has shown itself to be an inspired, informed, resourceful, client-focused organisation and my Board and I are delighted with the pioneering, next generation strategy that we have just approved."



Cass Business School
CITY UNIVERSITY LONDON

**Dochas**

The Irish Association of Non-Governmental
Development Organisations



EdmundRice
FOUNDATION

CASS Centre for Charity Effectiveness

"I wanted to re-iterate my thanks to you for your presentation to the 200 strong audience at Cass Business School. Your introduction to Caplor Horizons and its foundation kept the audience highly engaged and gave just the right amount of information for Charles Handy to respond! It was wonderful that you were able to act as an intermediary (to re-introduce Charles Handy to us) and be the catalyst to encourage him to speak. All the evaluation form returns are showing yesterday evening to have been a wonderful success. Thank you for the important part you played in it."

Dochas

"Dochas worked with Ian Williams and Lorna Pearcey of Caplor Horizons to facilitate a special meeting of our Board, where we aimed to develop a sense of team spirit, as well as progress some sensitive issues about our structure. The day proved to be a huge success, with many of the Directors commenting on the great pace of the day, the sensitive way the decisions were facilitated, and the energy and creativity that Ian and Lorna brought to the sessions."

Edmund Rice Foundation

"The process of working with Caplor Horizons was engaging, enlightening and energetic and all delegates expressed their greatest satisfaction with the outcome achieved in just three intensive days. The preparation work with the steering committee was professional, intelligent and empathetic and, by the commencement of the formal work, I had every confidence that the facilitators understood our organisation, its purpose and its hopes for the outcomes from the review. Caplor Horizons' approach was respectful, but challenging, and Ian and Lorna skillfully led the group to a common articulation of a highly complex reality. Rarely have I participated in a workshop like this where every delegate owned the outcome with passion and energy. Caplor Horizons has enabled us to take a major step forward in collaboration in our Mission across the globe."



TechnoServe

“The regular and highly cost-effective engagement with Caplor Horizons over the last two years has dramatically improved the quality and outputs of our gatherings. The diversity of expertise that they bring through their network of experts, and the application of their distinctive Caplor House model, has enabled them to provide specific and targeted support to a wide range of teams in the region. Their growing understanding of our culture and work has made their engagement incrementally more valuable each time. Since any such team meetings involve a substantial investment of time and money, I can’t overstate the importance of both the strategic and tactical inputs from Caplor Horizons that help us to make the most of these all-too-rare opportunities to learn from each other, and apply our collective wisdom to meeting the challenge of bringing business solutions to poverty.”

United Purpose

“We have only exemplary things to say about the whole Caplor Horizons team. They were very well prepared, dedicated, and delivered (on schedule) a high quality report for us, exceeding our expectations in terms of quality of analysis and writing. They were in constant communication, ever helpful and reliable. Despite providing a very highly skilled and experienced team to deliver our assignment, Caplor Horizons offered exceptional value for money.”

