

# tfn **GUIDE** 2017

TO RUNNING A CHARITY OR SOCIAL ENTERPRISE



## The **STREET SOCCER SUCCESS STORY**

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**Susan Smith**  
Third Force News editor

# Welcome

Welcome to the TFN Guide to Running a Charity or Social Enterprise 2017. This supplement pulls together and expands on some of the key issues covered in the weekly print Third Force News and at [www.thirdforcenews.org.uk](http://www.thirdforcenews.org.uk).

TFN's editorial team knows that good-quality up-to-date information on funding and finance, management, legal and insurance issues are essential for voluntary organisations big and small.

Although there can never be an exhaustive or definitive guide to running a charity in Scotland, articles in this guide will help you choose the right bank account, work out whether to invest some of those much sought after reserves you've built up, look after your staff and respond to upcoming legal challenges, such as the introduction of new data protection laws in 2018.

We also know you love reading about the people and organisations you're working alongside, so look out for 10 people shaping the sector, and features on Street Soccer Scotland, which won Scottish Charity of the Year 2017, and Jim Campbell, who was named Terrific Trustee at this year's Scottish Charity Awards.

There's also plenty of top tips on applying for funding, good governance, and employing staff and volunteers. Finally, we've thrown in a few softer articles, such as our list of social enterprise caterers for you to mull over with a cup of tea and a scone.

The TFN team hopes you find this guide useful and informative. Remember, there's a lot more where this came from at [www.thirdforcenews.org.uk](http://www.thirdforcenews.org.uk) – you can sign up to our free twice weekly ebulletin at [www.thirdforcenews.org.uk/signup](http://www.thirdforcenews.org.uk/signup)

Good reading,

*Susan Smith*

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“The test of our progress is not whether we add more to the abundance of those who have much; it is whether we provide enough for those who have too little.”

– Franklin D. Roosevelt

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# TFN investigation: third sector pension fear

A TFN survey on how the third sector feels about pension deficits has uncovered wide-ranging fears about how charities will cope with rising debt.

Staff and trustees are very worried about the level of their charity's pension deficit with many believing it could lead to their organisation's closure.

A TFN survey completed by senior managers and board members during August 2017 uncovered the level of concern in the sector about the issue.

While more than 70% of people who completed TFN's survey believe their charity's pension debt is currently manageable, around 60% don't believe it will continue to be in the future.

More than 60% of respondents were worried or extremely worried about their pension deficits and 22% said it could even lead to their organisation's closure.

With UK wide third sector pension deficits was last calculated in 2013-14 at £1.63 billion (there isn't currently a figure for Scotland), TFN wanted to find out how concerned people are.

We uncovered a range of fears

related to pension debts, with many claiming their pension deficit was preventing them from improving terms and conditions for staff (54%), developing new services (50%) or expanding existing services (54%).

60%  
do not  
believe their  
charity's  
pension  
debt will be  
manageable  
in the  
future

"It's directly affecting our ability to give any pay rises to staff, or introduce graded pay scales," said one respondent from a charity with an annual income over £250,000. "Staff have only received a 1% increase in six years and our relatively low pay is making it harder to recruit."

A recent accountancy regulation decision means charities now have to disclose the full extent of their pension debt in their annual accounts. For some charities this means they may appear to be operating at a loss, which is causing concern for trustees and funders.

Two thirds of respondents said their pension deficit was affecting trustee confidence in their charity.

Around 13% of all respondents also said they had had trouble securing grant funding because of their debt and a similar amount felt it impacted on their ability to negotiate partnerships.

"The spiralling liability is completely outwith our control – our deficit has risen by over £25,000 in the last five years – with no one new joining the scheme," said one respondent.

"No matter how well we control

£1.63bn ...the current  
total third sector  
pension deficit

our finances this is a completely uncontrollable debt. We have taken steps to avoid having to enrol anyone else in recent years by moving our provision so that future contributions / membership will not accrue a liability for us."

Despite, pension issues frequently hitting the headlines over the last few years, around 42% of respondents said their charity did not have a plan to reduce their pension deficit.

"We are contributing over £200 per month and this figure will probably continue to rise every year for

"Staff have only received a 1% increase in six years and our relatively low pay is making it harder to recruit"

Survey respondent

years to come," said one respondent. "It means that over and above having to raise funds to maintain our service we have to find this money. The debt for what is a small charity is now over £100,000."

While there are some options open to charities to reduce their debt, such as using reserves to buy out staff who have not yet retired, some charities say they cannot afford to take these measures.

One respondent from a charity with an income over £1m said: "Charities would benefit from

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national/governmental support to clear this debt as the sums of monies concerned are too great for the majority of charities. For smaller charities we are aware this is having a direct impact on their ability to provide services.”

The message from support bodies such as the Scottish Council for Voluntary Organisations (SCVO) and the Charity Finance Group (see page 7) is that charities shouldn't panic but should have a plan in place to deal with their deficit.

SCVO has been working with its staff and other members of the Pensions Trust Scottish Voluntary Sector Pension Scheme to reduce its deficit. It says this will improve the health of this fund for all members, even those who can't afford to buy staff out.

Tim Hencher, director of finance at SCVO, said: “It's understandable that staff and trustees of Scottish voluntary organisations are nervous about their pension debt.

“Scottish charities like many other businesses have suffered as a result of the devaluation of pension funds and their over cautious valuation.

“If they aren't already, charity trustees need to be examining any liabilities within defined benefit pension schemes, questioning valuations and exploring how to manage them. We would advise you to talk to your pension provider and see if there's anything they can do to help.”

A spokeswoman for the Scottish Government said it was keeping an eye on the problem too. She said: “The Scottish Government recognises the work of charities and knows the huge contribution the third sector makes in making this a better and fairer place to live for us all. We are in touch with third sector representatives about the issues faced by some organisations in respect of pension liabilities. We would urge any body which has identified such issues to contact their funders and their pension fund at the earliest opportunity to discuss options.”

The TFN Pension Survey 2017 was completed by 81 people during August 2017.

## The pension problem

Third sector organisations in Scotland are linked into a range of different pension schemes, including historic final salary schemes such as the Pension's Trust Scottish Voluntary Sector Pension and local authority pension schemes.

These pensions involved people and companies paying in over the course of their careers in order to get a pension with a guaranteed link to their final salary when they retired.

However, following the economic crash in 2008, the value of pension funds took a nosedive. This has left most with not enough funds to make payments out to people who have retired or will retire in the future.

Many charities, like employers in other sectors, have now decided to either leave these schemes or closed them to current staff. However, they still have to pay off the deficit between what the scheme currently holds and what it needs to pay out to their staff or former staff. These repayments are often calculated over a long period, such as 10 or 20 years. While the full debt looks large on a charity's balance sheet, the repayments are usually much more manageable – much like a personal mortgage.

However, what's causing more fear is that this debt keeps getting bigger. Later this year, many pension funds will go through a process which happens every three years to re-evaluate the extent of the shortfall.

It is expected that this will lead to the debt going up and an increase in repayments charities have to make. Some charities fear that at some point these repayments will no longer be manageable.

## Diffusing the PENSIONS TIME BOMB



Anjelica Finnegan

Pensions deficits have rarely been out of the headlines over the last year. Like all parts of our economy, charities too have been hit hard by rising life expectancy and lower than expected return on investments.

The latest data for the sector shows that the pension deficit has fallen over £100 million to £1.63 billion in 2013-14 from £1.75bn in 2012/13. Of course with the cuts to interest rates and volatility in the market post-Brexit, this figure will fluctuate.

However, it's important not to simply look at the numbers.

Charities' pension deficits are no secret and even more people are aware of the scale of the challenge charities face now that the enhanced disclosure on the Charities SORP requires charities to disclose their pension deficits up

front in their accounts.

This can spook employees, beneficiaries, supporters and funders alike as the scale of any deficits are now clearly laid out.

But the figures are only half of the story. If you are someone that is concerned about a charity's pension deficit your first step should be to look at the annual report that accompanies the accounts. It is here that a charity will outline what it is doing to address the deficit and how it will mitigate the risks.

So what are charities doing to fix the problem?

Unlike businesses, charities cannot skim money off their profits to address their deficits. Rather they need to find ways to find reign in (often dwindling) unrestricted funds.

There are steps that charities can take, and indeed are taking, to

put their schemes on a financially stronger footing. For example, they have reduced benefits, raised contributions, and implemented long-term recovery plans and pledging assets.

You can find more information about addressing your pension deficit in Navigating the Charity

Pension Maze, Charity Finance Group's (CFG) free online guide at [cfg.org.uk](http://cfg.org.uk).

Next we have to look at changes to pension legislation.

I don't want to get too technical – but it is also worth noting that our current direct benefit pensions legislation is broken. For charities I am thinking in particular of section 75 which covers employer debt in multi-employer schemes.

For those charities looking to close such schemes to new members, they

are trapped in a catch-22 where they can neither afford to exit the scheme, nor stay in it. This has contributed to charity closures.

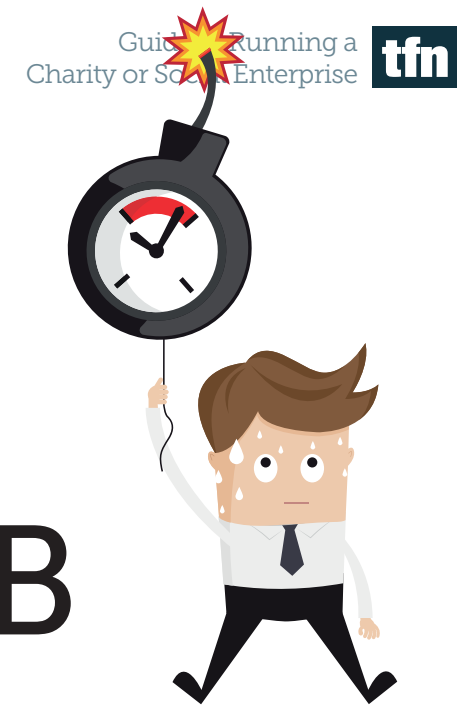
For those interested in technical detail, you can read more about section 75 in a blog I wrote on the issue, which you can read at [blog.cfg.org.uk](http://blog.cfg.org.uk).

I am pleased to say that as of April 2017 there is light at the end of the tunnel. After years of CFG and others in the charity sector fighting for change, the Department of Work and Pensions has produced draft regulations which will allow charities to defer paying a cessation debt if they look to close their multi-employer scheme to future accrual. You can read more in the news section at [professionalpensions.com](http://professionalpensions.com).

This should mean that charities can put in place a plan to make sure they meet the obligations they have to their employees without continuing to incur debt that they will struggle to pay.

“There are steps that charities can take, and indeed are taking, to put their schemes on a financially stronger footing”

Anjelica Finnegan is policy and research manager at the Charity Finance Group.





# The top risks facing charities in Scotland



Photo © Getty Images

In a climate of political and economic uncertainty, charities in Scotland are coming under pressure from all angles.

From the challenges involved in assembling a pro-active managing board with the right skill set, to the reputational damage that governance failures can inflict, Zurich Insurance takes a look at some of the top risks facing Scottish charities today.

## Competition for funding

The competition for charity funding has never been more intense. A switch from government grants to contracts has been a trend experienced by all charities over the last decade or so. Add to this the sheer number of registered charities – 24,000 in Scotland alone – and funding pipelines soon start running dry.

While it is great to see so many thriving, intense competition means that charities need to work hard to stand out, and organise effectively to ensure that every penny possible goes to the intended cause.

## Working with new partners

Charities are increasingly working with local authorities and the NHS, which opens up its own challenges.

Charities need to ask themselves “what risks are we exposed to by this relationship?” Branching into new partnerships can be a great way for charities to swell the coffers. However, all parties need to be clear about the nature of the contract and what needs to be delivered – a cancelled contract helps no one.

## Reputational and brand risk

We have all read about unethical fundraising practices, controversial executive pay, high-profile governance failures and perceived profligate spending. Unfortunately, mistakes by charities make big news.

Avoiding reputational damage and bad news stories ultimately comes down to strong governance. Whether investing in datasets to target donors, or reviewing staff pay, charities of all sizes need to consider the PR angle and the dangers of being labelled with the ‘unethical’ tag.

## Cyber risk and fraud

No sectors are immune from the dangers of fraud and cyber crime. The Cyber Security Breaches Survey 2017 reveals that nearly half of all charities in the UK suffered a breach or attack over the previous 12-months.

While it may be impossible to completely avoid the dangers of cyber crime, steps can be taken to minimise the risks. An Information Governance Health Check, available to all Zurich customers, is a great place to start.

## Putting together a skilled and varied board

Establishing an experienced board with a range of skillsets is one of the most effective ways to minimise risk. A crucial part of this is planning for the future.

Does the board collectively have the range of skills needed, and understand the risks to the organisation if it is to thrive? Does it regularly consider the range of risks the organisation faces and take actions to mitigate them?

While varied skillsets are important, there is also no shame in calling in outside help. Identify where the skills gaps are, and build an external network capable of filling them.

**Zurich’s charity team can help your organisation prepare for the challenges ahead. For more information please call us on 0808 120 5087 or email us at [info@zurichmunicipal.com](mailto:info@zurichmunicipal.com).**

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# Risky business: why trustees must be on top of risk



Adrienne Airlie

Trustees are there to ensure that a charity meets its objects and to safeguard its assets and reputation.

Safeguarding is key, how can this be achieved without an understanding of the risks associated? Not having a risk policy and processes for understanding, managing and developing strategies to mitigate risk, leaves trustees short of fulfilling their duties.

Risk management however is more than just creating a long list of risks the charity faces, ranking them according to their likely impact and discussing them at quarterly board meetings.

Instead, trustees must have a clear and unambiguous understanding of the level of risk that is acceptable to the charity. Within this, trustees should make

a clear distinction between the charity's risk appetite and risk tolerance. This should be documented in a formal risk policy, which should be communicated and embedded throughout the charity so all staff, management and board members understand what needs to be taken into account when making decisions.

The policy should clearly state who is responsible for monitoring and managing risk, how risks should be documented and reported, and to whom. It should cover new risks and emerging issues that could impact the charity and how these will be assessed.

Charities also need to consider whether the charity's trustees and senior managers understand risk and the range of potential risks the charity could face? As a starting point risks facing charities are split into five areas:

- governance risks that could impact the board's decision making capabilities.

- operational risks that affect the day to day running of the charity.
- financial risks – most risks will have a financial impact, both positive and negative. There will always be areas where the charity will be prepared to take risks in order to achieve its charitable purpose.
- external risks including political, environmental, economic, social and technological factors. More often than not these risks are outside the control of charity and more difficult to anticipate and manage.
- regulatory and compliance risks relating to the wider regulatory framework.

There are a wide range of approaches to document risk and facilitate effective monitoring by a board. In my experience, charity trustees are much more likely to engage with a high level analysis of the strategic risks if they are small (and focused) in number. A number of risk registers I've reviewed are very comprehensive and detailed but

have missed the strategic risks the charity faces.

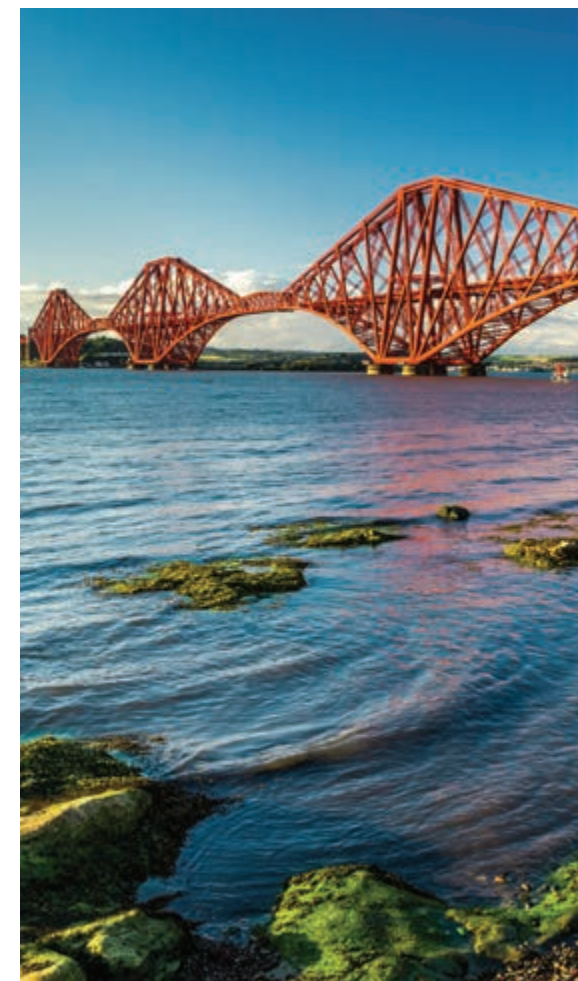
The following areas should be considered – effectiveness, financial health, brand and reputation, and compliance.

Putting in place robust financial controls will also help to identify and manage risk. The charity's risk policy should refer to these controls and the boundaries that have been set to minimise or mitigate risk.

Some charities also find it helpful to set up a sub-committee for finance and risk. At these additional meetings trustees, charity employees, and their advisers can provide a detailed scrutiny of all areas.

In summary, there should be an understanding of risk that permeates all levels in the charity, with the tone being set by the trustees and the rhythm being constantly monitored and acted upon by managers, staff and volunteers.

**Adrienne Airlie is chief executive of Martin Aitken & Co.**



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## Vision

Our vision is for a society in which people create positive change and enjoy fulfilling lives.

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Our mission is to make a difference to people and communities, by encouraging positive change, opportunities, fairness and growth of aspirations, which improve quality of life.

## Please get in touch

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- We have a range of **grant programmes**, including the Henry Duncan Grants, PDI (Partnership Drugs Initiative) and funds that we manage on behalf of others.
- Our **People in Place** team works with communities, including those we don't historically reach, aiming to get alongside and support them to create positive change.
- We want to use our 30+ years of experience to **support other grant makers** through Fortify Social Enterprise (CIC).

[www.corra.scot](http://www.corra.scot) [hello@corra.scot](mailto:hello@corra.scot)

The Corra Foundation is a charity registered in Scotland (No SC009481) and is also a company limited by guarantee (No SC066068). Fortify Social Enterprise CIC is a community interest company registered in Scotland and is also a company limited by guarantee (No SC507457). The Corra Foundation was previously called Lloyds TSB Foundation for Scotland.



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# What's the best bank account for your charity?

Many banks and building societies offer special current accounts for voluntary organisations and charities, and most give free banking if the account is in credit. Conditions and benefits vary, and can change over time, but the Scottish Council for Voluntary Organisations has highlighted the main features of current accounts from institutions that have strong links to the third sector, or who have a significant high street presence in Scotland, in its bank account comparison table. Consider whether your bank account offers online dual authorisation. To protect against fraud, any internet or card payments should be approved by two people for additional security and fraud prevention.

## Charities Aid Foundation Bank

A registered charity which provides tailor-made financial products and services for the voluntary sector. Any profits made are reinvested into the charity sector. £1000 minimum opening deposit

### CAF Cash Account

**Key features:** £5 monthly fee. Offers dual authorisation on online banking. Low charge CHAPS, free online QuickPay facility for salaries; UK network of cash machines displaying the MasterCard® mark using the CAF Bank business card. Bacs bureau services for payments and collection of Direct Debits; access to card payment processing services.

[cafonline.org](http://cafonline.org)



## Triodos Bank

Works specifically with organisations and groups which create real social, environmental and cultural value.

### Triodos Charity Current Account

**Key features:** Charges vary for day-to-day banking services; interest on credit balances of £5,000 or more; dedicated customer focused service and current account transfer service. No credit or debit card available on any current accounts. Access to NatWest or RBS.

[triodos.co.uk](http://triodos.co.uk)



## Unity Trust Bank

Works with organisations that aim to have a positive impact on society through economic, community or social change.

£500 minimum opening deposit

**Key features:** There is one deposit and two current accounts available, fees from £6 per month. Option to set up single, dual and triple authority of payments.

[unity.co.uk](http://unity.co.uk)



## Bank of Scotland

### Treasurer's Account (for non-profit making organisations with a turnover below £50,000)

Key features: additional services such as Direct Debit and bulk payments to pay suppliers or wages and salaries may incur charges; support from business management team.

[business.bankofscotland.co.uk](http://business.bankofscotland.co.uk)



## Lloyds Bank

### Treasurers' Account (for not for profit organisations with turnover less than £50,000)

**Key features:** Offers dual authorisation on online banking. No charges on daily debit and credit entries; second signatory on the account; ongoing support and guidance. Free presentation cheques to use when making a large donation or awarding a major prize.

[lloydsbank.com](http://lloydsbank.com)



## Co-operative Bank

Gives registered charities, Community Interest Companies, Co-operatives and Credit Unions an ethical way to bank for free.

### Community Directplus

**Key features:** Interest on credit balances of £25k or more, can apply for project funding for £500-£1,000 from the Customer Donation Fund. Access to Post Office branches.

[co-operativebank.co.uk](http://co-operativebank.co.uk)



## Reliance Bank

Believes in ethical banking and profits are used to further the work of The Salvation Army.

### Charities, Club & Society Current Account (for charities with turnover less than £500,000)

NB: Access to Lloyds, Natwest, HSBC or RBS

**Key features:** Clubs, trusts or societies that are not charities offered the initial first 6 months with free banking if in credit followed by a review. Current accounts with a cheque book, paying in book, corporate VISA debit card (subject to application), electronic payment facilities, overdrafts (subject to status and application) and business lending, relationship managers.

[reliancebankltd.com](http://reliancebankltd.com)



## Royal Bank of Scotland

### Community Account (for clubs, charities, societies or other not-for-profit organisations with a turnover of less than £100k)

**Key features:** Free banking, subject to status, to not for profit organisations as long as your annual turnover doesn't go over £100,000.

[business.rbs.co.uk](http://business.rbs.co.uk)



## Clydesdale Bank

### Business Choice Charities Account (only available to registered charities)

**Key features:** No transactional fees levied if account turnover under £1m. Interest calculated daily and applied monthly; choice of statements issued monthly or more frequently on request; credit interest linked to the base rate; unlimited withdrawals and deposits; relationship manager.

[cbonline.co.uk](http://cbonline.co.uk)



## Santander

### Treasurer's Current Account (for non-profit organisations with an annual turnover of up to £250,000)

**Key features:** Up to three signatories, any one signatory can approve any financial transaction, there is no option available for more than one signatory to be required to authorise financial transactions. Free text message and email alerts, charges for non-standard transactions such as change giving, CHAPS payments; a daily transaction limit for ATM withdrawals; no interest paid on credit balances, no arranged overdraft facility.

[santander.co.uk](http://santander.co.uk)





# Looking after cash and investments



**Heather Lamont**

## Make sure your cash is safe

This may sound obvious, but the rules affecting deposits have changed. Should your bank or building society get into difficulties, it's not safe to assume that you will get your cash back regardless. The new bail in regime aims to ensure that next time round, the taxpayer

doesn't have to foot the bill for rescuing a financial institution, especially not if the bond holders and depositors who've been enjoying interest payments from said institution get their capital back without any loss.

So particularly if you have more than the Financial Services Compensation Scheme limit (currently £85,000), you need to think about where your cash is, and whether you need to spread it around to avoid too much exposure to any one institution. If keeping on top of the paperwork for multiple accounts and juggling deposits between them is too much hassle, look at

cash deposit funds (there are some specifically for charities) which will do that for you.

## If you've got longer term reserves, make good use of them

Well managed organisations don't run out of cash. The bank balance will rise and fall, but when did it last fall to zero? Chances are there's a minimum level that you never drop below (it may even be the level mentioned in your reserves policy).

But every year that cash sits in the bank, it's losing some of its real value because of inflation; and to maintain the spending power of your reserves,

you may have to top them up from future years' budgets.

So rather than hold everything as cash, you'd probably be better off putting at least part of the bit that's always there into investment assets such as company shares, property and infrastructure. These should give you many times more income each year than you can get on bank deposits, and unlike cash they can be expected to grow in value over time.

## Size doesn't matter...

Longer term investments are just as accessible for small organisations as for large ones. You can buy into one or more of the

specialist pooled funds for charities with an initial investment as low as £1,000. These can give you access to an all-round portfolio that's targeting the right investment objectives for your organisation, at very reasonable cost and without creating a new burden for your staff and trustees in administration and reporting.

And although you wouldn't want these investments if you weren't thinking pretty long term, that doesn't mean that you're locked in – most funds will allow you to

add to or withdraw from your investment weekly if not daily, so there's plenty of flexibility if your plans change.

## ...but your reputation does

Pooled funds are the sensible choice for charities looking to access long term investments efficiently, but it's wise to consider how well aligned a particular fund is to your organisation's values and mission.

Gone are the days when charities could claim to have an effective ethical

policy in place because they excluded direct investment in certain companies, while ignoring what was going on under the bonnet of any pooled funds in their portfolios.

Fortunately there is now a wide range of funds with a variety of ethical and responsible policies, including some that offer portfolios designed especially for charities. There is at least one to meet the needs of most charities, and a sensible ethical policy doesn't mean that you'll be sacrificing financial returns.

**Heather Lamont is a client investment director at CCLA, one of the UK's leading managers of investments for charities, churches and local authorities.**

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# Street Soccer Scotland shows it's in a league of its own

**Jolene Campbell** uncovers the secret of the success of this year's Charity of the Year winner



In just twelve months Street Soccer Scotland co-hosted the Homeless World Cup, won charity of the year, a CNN Hero award and scored a double win for both men's and women's teams as the winners of first ever 5 Nations Homeless Football tournament.

And with that hat trick in 2016 the charity entered a league of its own. Street Soccer Scotland started as a small social enterprise in 2009 with a grant of £3,000 and a mission to create positive change through football.

The organisation now runs over 30 programs a week using the power of football to combat social exclusion – from poverty, homelessness and mental health problems to addiction.

The charity is national partner for the Homeless World Cup and coaches a team of men and women for the international tournament annually. Scotland has won the competition twice.

But, in 2016 Street Soccer Scotland went the extra mile, taking on the

challenge of co-hosting and being the home nation for the tournament in Glasgow.

The massive international tournament held in Glasgow welcomed over 800 players and volunteers, and audiences of up to 100,000.

Street Soccer pulled it off while not taking its eye off the ball; it continued expanding its core programmes and developed new corporate partnerships.

Founder and chief executive David Duke is not a fan of awards but winning Scottish Charity of the Year was a badge of honour.

"I didn't expect us to win but I am proud that the team got recognition. It has been an incredible year! The Homeless World Cup created a momentum and a lot to capitalise on."

The buzz created around the tournament had a knock-on effect. Street Soccer saw a rise of up to over a hundred players at some of its sessions.

The free drop-in sessions in Glasgow, Edinburgh, Dundee and

Aberdeen welcome 13,500 adults and nearly 9,000 children each year. Players develop friendships, build their confidence and find motivation to make positive life changes.

For David the real win is that tournament success reflects the year-round, life changing work of Street Soccer staff and volunteers.

"We always keep that focus on impact. Sometimes that is helping to keep somebody alive, safe and happy. People need to feel they belong. If we do that the rest will follow".

"We focus our energy on how people feel and how they see themselves. Football is a way in to make people feel worthwhile again. For some it could be that after a programme with us they are still alive. They have hope that they had lost. That means something but it's not always easy to record that in an outcomes chart."

Players access a range of opportunities at Street Soccer from drop-in sessions to the Football Works initiative offering work skills, training,



"We always keep that focus on impact. Sometimes that is helping to keep somebody alive, safe and happy. People need to feel they belong. If we do that the rest will follow."

**David Duke**



personal development and coaching leading to SQA qualifications.

The vast majority of players report higher levels of self-esteem and nearly half say it inspired them to reduce their substance misuse.

Reflecting on how far the organisation has come since it started eight years ago, David said the key has been keeping the focus on personal development. And for David witnessing the changes in players is still the top achievement.

"One team member recently picked me up in a new car. She went through mental health problems, prison and battled addiction.

"Little things that seem so normal like learning to drive can bring so much satisfaction. Just to be able to experience that normality that has been out of reach so long."

David understands feeling like normality is out of reach. He became homeless himself, aged 21, sleeping rough and in hostels before football helped give him the confidence to





turn his life around.

“I remember what it’s like to wake up feeling I wanted the day to pass quickly. When I was picked for the Homeless World Cup squad everything changed. Every day I feel lucky that I rebuilt my life and can recreate that hope and energy for others.”

Over 60% of Street Soccer staff started the journey as players and have stayed on to inspire others. Creating that community is at the heart of the charity’s success, says David.

“It’s a family. Street Soccer coaches are not football professionals. They understand where people are coming from and the barriers they face just to get out on the pitch.”

In 2016 five new female members of staff joined the team including two ex-players. Street Soccer has also launched a new programme mixing

aerobics and football and it’s proving a hit with women who never played football before.

“People coming to Street Soccer face many tough challenges. Some go onto make big changes. We have had players who went from standing on corners to getting into full time work. For others coming along they face different barriers like body image. Or they have never played football before. Our work always starts with the emotions, with the person.”

When it comes to winning funding and growing the not-for-profit social enterprise David is always thinking ahead.

“In the first few years it was about survival. Now we are focused on impact, on creating the most change and delivering the best services.”

In 2016 Street Soccer launched a membership sponsorship package

aimed at corporates, moving away from relying on government funding.

“This year we have grown our corporate sponsorship so in the long-run we are not relying on grant funding and we can expand to create even more impact,” he explains.

David is excited about the opportunities ahead. Street Soccer’s new foundation is working on ambitious plans for a new model to tackle homelessness.

The Change Centre will provide accommodation for 32 homeless people in a community centre style building featuring two five-a-side football pitches.

David said: “People will have options. They can learn skills while volunteering and get any support they need. The idea is that people will make connections, find purpose. They will find hope.”

## Sarah Rhind: believing in the power of street soccer



After battling addiction for years Sarah Rhind (pictured centre) lost her dad in a car crash. She knew then she had to make a fresh start. “I always liked football. I remember my first session with Street Soccer. It was just fifty guys and me! I was terrified but they welcomed me.”

She stuck with it, tapping into her passion for the beautiful game, gained qualifications and volunteered with Street Soccer coaching young people. “For most of my life I was drawn to drugs and had poor self-esteem.

“Then I found out I was good at

**“It’s the most challenging thing I have ever done”**

coaching. I wanted to do it all the time.”

Sarah, 33, was the first player selected for the Homeless World Cup women’s team. And after that, against the odds, she also went onto coach youth players at Celtic Park. She was initially accepted onto a coaching course with the club: “I was too old but went for it on the off chance and they said they couldn’t

afford to let me go!”

Now Sarah is the programme co-ordinator for Street Soccer in Aberdeen. “It’s the most challenging thing I have ever done. At the start I felt I was over my head. Now I see changes in the young people, little breakthroughs when they open up now and trust me.”

“This is not just a job. Every team member I know is here because they genuinely care. You can’t fake that. It’s real and the young people know it. That’s what Street Soccer does. We believe in people when they can’t believe in themselves.”

# AUCHINLECK COMMUNITY DEVELOPMENT INITIATIVE

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- Seek to understand & respect the needs of our funding bodies
- Aim to work more closely with residents to ensure our services are relevant and respective
- Work as a team to ensure our services reflect our values and commitment

For further information contact us at Auchinleck Community Development Initiative, The Boswell Centre, 18 Well Road, Auchinleck KA18 2LA, call 01290 428482 or email [shonaacdi.step@hotmail.com](mailto:shonaacdi.step@hotmail.com) or [stephen.mccarron@live.co.uk](mailto:stephen.mccarron@live.co.uk)



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Val Surgenor

## 12 steps to get ready for new data protection laws

The new General Data Protection Regulation (GDPR) will bring about the greatest ever reform of current laws on data protection on 25 May 2018.

The Information Commissioner's Office has issued guidance on the 12 steps to GDPR compliance, and here we will look at the steps your organisation should be taking now to ensure you are compliant in time for the new law.

### 1. Awareness

You should be acting now to ensure your organisation is GDPR compliant. There's less than one year to go and implementation of the GDPR within an organisation could involve significant resources and planning – it's never too early to start preparing for change.

### 2. Information you hold

The GDPR requires you to maintain records of all data processing activities. It's important for organ-

isations to review their data, where this came from, how long they've had it, and the legal basis for processing.

### 3. Communicating privacy information

You should review your organisation's privacy notices and make the necessary amendments to ensure GDPR compliance. The Information Commissioner's Office has developed a code of practice for privacy notices which organisations can use to ensure GDPR compliance.

### 4. Individuals' rights

Check your procedures to ensure they cover all the rights individuals have. Some of these are new under GDPR, such as the right to be informed, right of access, right to rectification, right to erasure, right to restrict processing, right to data portability, right to object, right not to be subject to automated decision making and profiling.

### 5. Subject access rights

You should update policies and procedures in place to deal with subject access requests to ensure you can comply within the new one month deadline.

### 6. Lawful basis for processing personal data

You must review the legal bases used for processing personal data to ensure this is still relevant and will be GDPR compliant.

### 7. Consent

Where your organisation relies on consent, you should read the Information Commissioner's Office guidance, as this legal basis is undergoing the most change.

### 8. Children

Under the GDPR, for the first time, children's personal data will be specially protected where organisations offer online services directly to children. You should ensure you have processes and mechanisms in place to verify the age of users and seek parental consent for children under 13.

### 9. Data breaches

In certain circumstances organisations will only have 72 hours from discovery of a breach to notify the relevant data protection authority. Organisations will also have the obligation, in certain circumstances, to notify data subjects directly if the data breach is likely to result in high risk to their personal data.

### 10. Data protection by design and data protection impact assessments

Privacy Impact Assessments will be required where processing is likely to result in high risk to individuals, e.g. where rolling out new technology, where profiling occurs or where processing is conducted on a large scale. The Information Commissioner's Office and the Article 29 Working Party have released guidance on this.

### 11. Data Protection Officers

Organisations should evaluate whether they require to appoint a Data Protection Officer.

### 12. International

If your organisation operates in more than one EU member state, you should identify the lead supervisory authority.

Val Surgenor is a partner at MacRoberts LLP.

### Part 2 of the Land Reform (Scotland) Act 2003 COMMUNITY RIGHT TO BUY



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## SENSCOT LEGAL

Senscot Legal (SL) is a social enterprise based in Glasgow, providing quality, affordable legal advice to the social enterprise and wider third sector. SL's social mission is to provide legal support to enable organisations to enhance their capacity and to develop in a sustainable manner and to achieve their own aims and objectives.

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# JOIN SCVO

The Scottish Council for Voluntary Organisations (SCVO) is the national membership organisation for third sector organisations in Scotland.

We support, promote and connect all parts of this lively sector, made up of charities, community groups, social enterprises and voluntary organisations.

Whether you are a small voluntary group starting out, an established household name or somewhere in between, SCVO can give you answers to many of your burning questions.

Find out more about the benefits of SCVO membership at  
[www.scvo.org.uk/join-us](http://www.scvo.org.uk/join-us)





Hazel Coutts

# How to avoid an employment tribunal

In recent years there has been a significant drop in the number of employment tribunal claims lodged. The government introduced tribunal fees in 2013 with the objectives of reducing the cost of the tribunal service, discouraging weak claims and expediting settlement.

However, the introduction of tribunal fees resulted in a 70% drop in tribunal claims. The high cost of fees and the low value of claims meant that claims were unaffordable for many litigants and uneconomic for most.

In July 2017, the Supreme Court ruled that tribunal fees prevented access to justice and were also indirectly discriminatory – fees for discrimination claims are higher than those for other employment claims causing disparate impact to those with a protected characteristic. Tribunal fees were abolished with immediate effect.

Employers should now prepare for a reverse of the trend of recent years. However, there are some simple ways to ensure they comply with their obligations, protect their organisation and mitigate the risks of potential claims.

## 1. Written contracts and policies

Employers are legally obliged to provide employees with a written statement of employment particulars within two months of commencement of their employment.

Well-drafted contracts and widely communicated policies can help minimise the risk of disputes arising and as such can facilitate a happy and

productive workforce.

Recent decisions have highlighted the importance of ensuring the documentation reflects the true nature of the relationship between parties.

A number of successful claims have been raised against Uber and Deliveroo for failure to pay the national minimum wage and holiday pay where self-employed contracts had been issued but in fact the relationship reflected that of a worker.

## 2. Act early

Many potential disciplinary and grievance issues can be dealt with informally saving time and expense. In more serious cases it may be necessary to arrange formal disciplinary or grievance hearings.

It is worth bearing in mind that, with some limited exceptions, employees are generally unable to raise a claim for ordinary unfair dismissal until they have accrued two years' continuous service.

If conduct or capability issues arise within this period, a fair dismissal may be possible with only minimal risk. Whether dismissal is appropriate will depend upon the circumstances of each case and it's worth taking advice before making a decision.

## 3. Employment law and HR training

It is vitally important for employers to

keep up-to-date with the law. Training for frontline managers and HR teams is essential to help develop their knowledge in managing matters such as disciplinary, grievance, equality and diversity, performance and absence management processes.

Our employment team produces regular updates which you can sign up to via our website. The team also runs free bi-annual employment law update seminars, hosted in each of our three offices in Edinburgh, Glasgow and Dundee and again you can sign up for those via our website.

## 4. Take advice

Employment law is constantly changing and employers could be forgiven (although not by tribunals) for struggling to keep up. It is critical that employers take advice when managing difficult situations and in particular dismissals.

All employers are at risk of receiving an employment tribunal claim. Preparing now can help to reduce risks, disputes and costs later, particularly in light of recent developments in the law.

Scottish Council for Voluntary Organisation members (SCVO) with an income under £500,000 are entitled to receive up to two hours of free legal advice so do not hesitate to contact SCVO should a tricky issue arise.

**Hazel Coutts is a senior association at MacRoberts. She has specialised in employment law since qualifying as a solicitor in 2005.**

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# People Shaping the Third Sector



## Alastair Davis

Chief executive of Social Investment Scotland

Alastair Davis has been chief executive of Social Investment Scotland (SIS) since 2011. SIS is a not for profit body set up to provide loan finance to charities and social enterprises. Since 2001, it has invested £56 million and grown into one of the sector's most important financial bodies. Under Alastair's leadership SIS teamed up with Asda to create the innovative Asda Social Enterprise Supplier Development Academy. This sees a cohort of social entrepreneurs learn how to pitch their products to supermarkets. It has led to the supermarket giant stocking BrewGooder beer, Heroes Vodka and Ginerosity, all made in Scotland. Alastair previously worked with Bank of Scotland. He is on the board of the North East Social Investment Company, has served as a director of Social Enterprise Scotland and is a past president of JCI Edinburgh.



## Angela Constance MSP

Cabinet secretary for communities, social security & equalities

Angela Constance has been a Member of the Scottish Parliament since May 2007, first for Livingston and now for Almond Valley. In her own constituency, she has seen the value of social enterprises, in particular the West Lothian Credit Union, which provides money advice and safer opportunities to borrow. Her father experienced long-term unemployment in the 1980s, giving her personal experience of the impact of unemployment and the important work of the third sector in tackling poverty. Angela is particularly proud of her role in supporting Community Jobs Scotland while serving as cabinet secretary for education and lifelong learning. The Scottish Government provides a core third sector budget of £24.5m a year.



## Celine Sinclair

Chief executive of The Yard

As a fiercely committed advocate for disabled children, Celine Sinclair leads and inspires The Yard team with her passion and dedication. The mother of an autistic son, Celine's relationship with the disabled children's playground began as a member, before joining the board and finally becoming chief executive in 2006. Since then, the service has grown from supporting 50 families in Edinburgh to almost 600 across the east of Scotland, with new centres in Kirkcaldy and Dundee opening in the last two years. Her vision of a Scotland in which disabled children's lives are filled with fun and friendship is not over – look out for a Yard opening near you soon.

## David Duke

Chief executive and founder of Street Soccer Scotland

David Duke knows what it's like to be homeless and feel hopeless, having spent almost three years of his 20s living homeless in Glasgow. It was this experience that led him to create Street Soccer Scotland, a social enterprise which works to provide training and personal development opportunities for socially disadvantaged groups through football. In under a decade it has built up services in Glasgow, Edinburgh, Dundee and Aberdeen welcoming 13,500 adults and nearly 9,000 children each year. An impressive 60% of staff were once players. Last year Street Soccer Scotland also played a pivotal role in running the Homeless World Cup, and this year won Scottish Charity of the Year 2017. David now plans to open a 32-bed homeless unit with a community football pitch and social enterprise café in Glasgow.



## Edel Harris

Chief executive of Cornerstone

Scotland's EY Entrepreneur of the Year 2017, Edel Harris has been chief executive of Aberdeen social care charity Cornerstone for nine years. In that time she has delivered business growth of £10 million and developed Cornerstone into a major business within the north east with an annual turnover of over £35m. The former president of Aberdeen Chamber of Commerce is now a director of Opportunity North East, the private sector response to the region's economic decline, and also sits on the board of Aberdeen Football Club Community Trust. This year, Edel has taken Cornerstone on a major journey, launching the Cornerstone Foundation in a bid to double public donations, and Local Cornerstone, a major restructure that removes centralised management from local services.







## Josh Littlejohn

Co-founder of Social Bite

It's impossible to ignore Josh Littlejohn. The man who set up social enterprise sandwich chain Social Bite has brought George Clooney and Leonardo DiCaprio to Edinburgh over the last few years and is probably Scotland's most famous social entrepreneur. His Scottish Business Awards has raised nearly £4 million for good causes since it was created. And the 30-year-old has shown himself to be a creative and innovative fundraiser through projects like buy a homeless person Xmas dinner, the CEO sleepout and this year's Sleep in the Park mass sleepout. All of this has enabled Social Bite to open five sandwich shops and a high-end Edinburgh restaurant, Home. 2017 sees Josh embarking on his most ambitious project, the creation of a Social Bite village in Edinburgh's Granton. It will provide 10 homes and rehabilitation support to people moving on from homelessness.

## Louise Macdonald

Chief executive of Young Scot

Louise Macdonald was named third sector director of the year at the UK Director of the Year Awards in October 2016 just a few months after picking up female director of the year at the Scottish awards. She has led youth information body Young Scot since 2008 and developed it into the leading digital charity in Scotland. During that time she's seen membership increase to 680,000. 2015 also saw the launch of young.scot, the stand alone information platform for young people, which saw traffic grow by 200% to around 138,000 a month. Louise is a digital pioneer herself and has made the Guardian's Top Social CEO's list for the last two years. She is currently chair of Scotland's National Advisory Council on Women and Girls and a board member of the Association of Chief Officers of Scottish Voluntary Organisations.



## Theresa Shearer

Chief executive of Enable

Named Scotland's third sector director of the Year by the Institute of Directors in 2017, Theresa Shearer heads up Enable, Scotland's largest charity for people with learning disabilities. Since her appointment in 2015, Theresa has turned the charity around from a £1.2 million deficit to a £407,000 surplus. This involved a wholesale transformation of Enable's model of social care to ensure the organisation was ideally placed to realise the ambitions of Self-Directed Support. In 2016, Theresa joined the Scottish Fundraising Working Group, tasked with creating Scottish fundraising regulation, and she is also a board member of Impact Arts. Like Louise Macdonald, she is also a social media leader making the Guardian's Top Social CEOs list. As one of Scotland's most dynamic and outspoken leaders, Theresa regularly contributed columns to TFN. Theresa has been shortlisted for the UK Director of the Year Awards 2017 in the public and third sector category, which will be revealed on 22 September, just after this publication goes to print.



## Susan Aktemel

Director and founder of Homes for Good


Susan Aktemel leads up Scotland's hottest social enterprise, Homes for Good. Set up in 2013 as Scotland's first social enterprise letting agency, it has developed at a fantastic rate and now manages 340 properties across the west of Scotland. In the last year it has moved into new premises in Bridgeton, where 18 staff, 72% of whom were previously unemployed, are based. Homes for Good investments uses social investment to buy empty and dilapidated properties and transforms them into good-quality homes for people on low incomes. It has raised £8 million in equity and loan investment and transformed 170 properties so far. Homes for Good was named Social Enterprise of the Year at both the Scottish Social Enterprise Awards 2016 and the Scottish Business Awards 2016.



## Martin Cawley

Director of the Big Lottery Fund Scotland

Heading up the Big Lottery Fund Scotland with £70 million a year to give away, Martin Cawley is every third sector manager's dream dinner date. And he knows as well as anyone how to spend it, with 34 years experience in the third and public sectors as a manager and leader, latterly as chief executive of Turning Point Scotland. This gives him a unique perspective on the funding relationship. Speaking to TFN in December 2016, he stressed his desire to put "faith and trust in the communities we are trying to give money to." Martin has held a range of non-executive positions throughout his career and is currently on the board of Braveheart Industries, a social enterprise aimed at providing job opportunities for people involved in the criminal justice system.



# THIRD SECTOR LEADERS

Join a unique membership organisation for third sector leaders & senior staff of Scottish Voluntary Organisations.

The Association of Chief Officers of Scottish Voluntary Organisations (ACOSVO) exists to support, strengthen and inspire leaders. We have a membership of over 450 ranging from those who lead small, community-based organisations to those who head up some of the largest charities in Scotland. We bring together sector leaders in a peer network, providing

space for confidential discussions and good practice sharing where leaders can talk openly and learn from those who've 'been there'.

We provide a wide range of topical events, development opportunities, membership benefits and relevant services. These include free Mentoring, support for Chief Officers and our Leadership Exchange Programme where leaders are paired cross-sector in

**"ACOSVO membership is vital"**

brief exchanges to develop leadership skill capacity, improve sector awareness and encourage collaboration.

**How to Join ACOSVO:**


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You can apply for Full or Associate membership and fees start from only £30 per year.

We are confident you will find membership rewarding both personally and professionally.

For more details please visit [www.acosvo.org.uk/join-us](http://www.acosvo.org.uk/join-us), email [office@acosvo.org.uk](mailto:office@acosvo.org.uk) or phone on 0131 243 2757.

**"ACOSVO offers an excellent opportunity to network and connect with peers in the sector."**



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For Scotland's Third Sector Leaders



# insurance and financial services tips for charities

**Keegan & Pennykid** has provided insurance and financial services to the third sector for over 40 years. Here is its guide for small to medium sized charities.

## Ensure that your organisation has appropriate insurance cover

This might sound obvious but it is fundamental to your organisation's survival. As well as insuring its assets and activities, your organisation may have contractual responsibilities with local authorities or health boards for which appropriate insurance may be required. Keegan & Pennykid has created the Encompass Guide to Insurance which aims to help you to identify those covers that your organisation needs, and how to go about arranging them. This is available to download at no cost from [www.keegan-pennykid.com/charity-insurance](http://www.keegan-pennykid.com/charity-insurance).

## Seek advice from a specialist insurance broker

An insurance broker with specialist knowledge of the third sector can be invaluable to your organisation. They can advise you on the insurance cover your organisation needs; put in place an appropriate insurance policy; advise on and assist with any adjustments you need to make to your insurance cover during the policy term; provide advice and assistance with claims and visit your premises to advise on improvements that can be made to reduce risk to your organisation. As a broker, Keegan & Pennykid has access to a range of specialist insurers as well as its own Encompass policy, which has been specifically designed to meet the insurance needs of the third sector. Find out more about



Encompass and Keegan & Pennykid's involvement with the sector at [www.keegan-pennykid.com/charity-insurance](http://www.keegan-pennykid.com/charity-insurance).

## Cheapest doesn't necessarily mean best

Whilst the cost of an insurance policy is important, it's more important that your organisation has the right insurance cover in place. If you are looking at alternative quotes, always ensure that they are on the same basis – frequently you'll find that they aren't. If you're unsure ask your insurance broker.

## Protect your organisation against cyber threats

Across all organisations, large and small, there is a daily threat of cyber attack which could compromise the integrity of your IT systems and expose your organisation to cyber crime including data theft. This puts

an organisation at risk of reputational damage, interruption to its core services and activities, regulatory sanctions and potentially significant unplanned financial costs. An effective cyber insurance policy is an invaluable inclusion in your suite of insurances. So, seek advice from a specialist insurance broker who can arrange an appropriate cyber insurance policy for your organisation. Keegan & Pennykid has recorded several short interviews with an RSA cyber specialist, which provide further information on cyber threats and how your organisation can protect itself against these. You can find these at [www.keegan-pennykid.com/cyber-insurance](http://www.keegan-pennykid.com/cyber-insurance).

## Write, test and review your business continuity plan

No matter how small your organisation is, it's vital that you have a business continuity plan in place to

ensure that your organisation can get back up and running as quickly as possible following an incident. The plan should be reviewed and tested at least annually, which can be simply by way of a talk through with the key people involved in the plan. You can access a free business continuity planning tool at [www.keegan-pennykid.com/business-continuity](http://www.keegan-pennykid.com/business-continuity).

## Keep good records including an up to date asset register

This will prove invaluable in the event of damage to your organisation's property or theft of any of its contents. Keep your insurance documents close to hand, along with contact details for your insurance

broker and insurer (including any out of hours emergency contact telephone numbers). In the event of damage to property take photos and do not throw anything away until the insurer has inspected or authorised its disposal, retain all original receipts and try and list what's damaged. If no evidence of purchase is available, the presentation of instruction manuals and original boxes can prove you actually owned the item. In the event of a break-in, theft or malicious damage always contact the police to obtain an incident number and take necessary steps to secure the building. Contact your insurance broker or insurer at the earliest opportunity.

## Act promptly if you receive a solicitor's letter or grievance from a member of the public, employee or volunteer of a notifiable event which may give rise to a claim

Don't respond directly, but instead contact your insurance broker or insurer immediately. You may have Legal Protection Cover and not need to incur costly solicitor's fees when defending an action or tribunal case. Never correspond directly with the third party/representative or release requested documents without checking with your broker or insurer first.

## For employers and public liability claims take clear notes of the circumstances

Make sure you know times and dates of exactly what's happened and details of everyone involved. Do you know the regulations and duties as an organisation in the event of a Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR) reportable accident? These require employers, the self-employed and those in control of premises to report specified workplace incidents. Report without delay as early intervention can reduce overall claims cost

when attempting to defend a claim or if it's proved you're liable.

## Ensure that your organisation meets its pension re-enrolment duties

Seek advice from an authorised financial adviser about pension re-enrolment. Every three years after your organisation's automatic enrolment staging date, you must put certain staff back into a pension scheme. This is called re-enrolment. Your duties will vary depending on whether you identify that you have staff to re-enrol, or whether you have no staff to re-enrol. Either way, you will need to complete a re-declaration of compliance. Re-enrolment and re-declaration is your organisation's legal duty and if you don't act your organisation could be fined. For advice and assistance with your re-enrolment duties, contact Keegan & Pennykid's financial services department on 0131 225 6005 (option 4) or email [enquiries@keegan-pennykid.com](mailto:enquiries@keegan-pennykid.com).

## Consider providing employee benefits to attract, retain and motivate your employees

The future of your organisation relies, to a great extent, on your employees, so retaining quality staff can be an essential component for the future. Whilst salary is important, by introducing one or more employee benefits you are recognising the worth of your employees and key employees may be discouraged from moving to another employer offering a better salary package. Employee benefits include group pensions, death in service, income protection (including employee assistance programmes) and health cash benefit and medical insurance plans. Find out more at [www.keegan-pennykid.com/financial-services](http://www.keegan-pennykid.com/financial-services).

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INSURANCE BROKERS



# Research is key in taking on your first employee

**Gareth Jones** spoke to **Lesley Winton**, of animal education charity Fostering Compassion, about taking on her first member of staff

Taking on your first employee is a major milestone for anyone who is setting up a charity.

It's exciting, but hiring staff can also be a stressful process involving lots of administration and protocol to ensure that you are complying with employment legislation.

Pensions, holidays and insurance are just some of the aspects that have to be considered. With the huge range of employment law, health and safety and confidentiality requirements, it can often be a complex field for organisations to deal with.

Lesley Winton, of Fostering Compassion, has been accessing advice on how to go about taking on an employee for her animal welfare education charity.

"The demand for our services has just exploded," she said. "We have been busier than we have ever been, and have almost reached a tipping point. To enable us to continue to grow, we are now looking to bring on a member of staff."

Fostering Compassion was initially an arm of The Winton Foundation for the Welfare of Bears, but expanded into a separate charity in 2013. Piloted with 10 pupils in East Lothian, the organisation has gone on to educate 250 children who have had difficult starts in life on animal welfare – as evidence shows that those who have suffered abuse often struggle to show compassion to other creatures.

Lesley has been operating the charity as a sole employee, and said she wants to ensure all the finances are in place

for employing a member of staff before takes the big step of beginning to recruit.

"I think it is important to have access to the funding not only for the charity, but also for the person who you are taking on," she said. "When you take someone on, you are providing them with a livelihood. You need to be in a secure position."

Lesley said that she has undertaken lots of research on becoming an employer, and that asking for help is important. She feared growing too quickly, as can happen with many businesses let alone charities, but is not nervous about becoming an employer.

"I have been looking lots of things up, but I think I will bring someone in to help with the HR side, even if it is a consultant. The Scottish Council for Voluntary Organisations (SCVO) has supported me as well.

"You have got to make sure that you comply with the law when you are bringing someone on as an employee.

"But it will be brilliant. We are taking the natural next step. Having grown the charity from the ground, we have gone through a variety of processes and steps. This is another one, and I think it will be an exciting step."

Get information on employment, taking on volunteers and managing staff from SCVO.

Free information can also be accessed by calling the SCVO information helpline on 0800 169 0022.

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# Micro-volunteering to fit with the busy 21st-century life



Eve Smith

Are you one of those people who has always wanted to volunteer but never has the time? More and more of us feel too busy to help out and do those good deeds, but the pattern of volunteering is beginning to change as we spend more of our time online and on smartphones. This is good news for you if you're struggling to fit volunteering around your busy week.

As a digital charity, it's easy for Euan's Guide to offer micro-volunteering opportunities. You can think of micro-volunteering as bitesize volunteering

– giving five minutes here or there to contribute to a charity. There are lots of ways to help, but some tasks are particularly good for micro-volunteers to chip in a few minutes.

For example, almost everybody has their phone close by in their pocket. It can take less than a minute to take a quick picture as you're walking by somewhere and send it to a friend. This is one way you can micro-volunteer for Euan's Guide. We need photographs of towns and cities all over the UK to create our town pages that are packed full of disabled access reviews from locals and visitors. It could be a quick snap of a famous monument, or your favourite

view from a bridge or street corner that you pass every day. Once you've taken it, you'd only have to email it to us the next time

**"The good news is there are lots of great benefits to being a social enterprise"**

you open up your inbox. Easy!

Micro-volunteering can sometimes also be thought of as a bit like citizen science, where lots of

people contribute a small part to a bigger project. It could be making a note of any birds you spot in your garden for a wildlife charity, or maybe photographing house spiders – if you're brave enough. For Euan's Guide, you could rate the disabled access of a coffee shop, cinema, museum or anywhere else. By doing so, you'd be helping to build the collection

of disabled access reviews that continues to grow on the website. Together, these reviews help to remove the fear of the unknown and give disabled people the information they need to visit different places and try new things.

Another small but meaningful way you can help Euan's Guide, or any charity you support, is to support us on social media. It might not sound like micro-volunteering, but it's becoming increasingly difficult for charities to be heard or seen on social media platforms as more and more content is added every day. Simply sharing a post or a call for a donation can help to spread the word about charities a little further.

**Eve Smith is communications manager at Euan's Guide.**

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## Mindroom is now The Salvesen Mindroom Centre

Our Direct Help and Support service, providing essential information, advice and tailored support to the families of children and young people across Scotland living with a learning difficulty, remains at the heart of what we do.

Our exciting partnership with the University of Edinburgh and NHS Lothian brings an enhanced research focus to our work. We will seek to:

- Increase general awareness about learning difficulties, backed by an expert team
- Provide practical approaches for professionals working with children and young people; and build effective collaborations with organisations from the public, third and private sectors particularly those involved in health and education.

We have updated our key publication, *It takes all kinds of minds. A guide to understanding learning difficulties.*

Download it from our website, or contact us to order a free copy.

If you or your organisation work with families, children and young people living with a learning difficulty, please contact us to find out how we can support your work.

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# To trade or not to trade?



Jennifer Fleming

In the social enterprise sector there is a lot of discussion of trading and long-term sustainability being key to the identity of a social enterprise.

However, as we all know, the realities of setting up a social enterprise or developing trading activity in an existing organisation can be a time consuming and mystifying process.

The good news is there are lots of great benefits to being a social enterprise, but as with everything, there are potential risks that should be considered.

One key benefit of trading is that you are increasing your autonomy and sustainability as an organisation through income generation.

Generating your own income means you can be more flexible in how you

choose to use your funds, be that buying resources or piloting a new idea. Therefore, your unrestricted funds are available for how you see fit. If you see a gap in the market or identify a need, there is no lengthy competitive funding bid to be submitted first.

Another benefit is that an incorporated trading arm can carry out trading activity that might not be within the primary objectives of the charitable body, which might otherwise restrict trading, and protects the organisation from any risks or liabilities.

On the other hand, there are also challenges to trading. There will be additional responsibilities in managing the governance of trading activity, as well as tax implications.

You should consider whether you need to bring on some additional board members with business experience to help develop the trading activity, and additional staff for deliv-

ering services or sale of products.

Being dependent on the organisation for income can be daunting at first, especially navigating the open market or starting to tender for contracts.

You also need to make sure not to take on too much too soon. Making the commitment to a lease or hire of expensive

equipment before the project has been proven to require it can put the whole organisation at risk.

Understanding why you are going to trade is the key consideration if you decide to trade. What is the product or service and what is the benefit to your customers or beneficiaries? Importantly, what is the benefit to your organisation?

It's also really important to think about the market

you are entering and how you fit into it. It's important to do your research and really find out if this is a service or product that will be attractive to potential customers or beneficiaries. A project plan is a great way to manage all of this information and create a timeline for the project development.

The bonus of a well thought out project plan full of great research is that it gives you the bones of your business plan. This should be a living document that is in place right from the start, paving the way for how you are going to develop the project and written in such a way that anyone can understand what exactly it is you are going to do.

If you have a great idea and are up for the challenge, there are lots of great support agencies and your local third sector interface, who will be more than happy to see how they can help.

**"The good news is there are lots of great benefits to being a social enterprise"**

**Jennifer Fleming is the social enterprise development officer at Voluntary Action South Lanarkshire.**

## CHAMPIONING EXCELLENT FUNDRAISING IN SCOTLAND



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### ORGANISATIONAL MEMBERSHIP

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### QUALIFICATIONS AND TRAINING

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### EVENTS

The Institute of Fundraising is at the forefront of helping fundraisers deliver up to date compliant fundraising. We hold a series of events showcasing insight and innovation through research, best practice guidelines and debate, led by sector experts and inspirational speakers.



# ways to ensure funding success

**Sandra Hogg** offers five key things to consider when applying for funding

## 1 Be organised with your applications

You've registered for Funding Scotland, scoured the website for suitable trusts and foundations in your area, and created yourself a list of potential funders. First hurdle cleared. But, then you need to check your organisation is eligible for each particular fund you want to apply for. There's no point wasting your time applying for funding for an arts project when the funder is only interested in poverty initiatives. Check the criteria on its website or publicity materials and if there's any doubt, give your potential funder a ring to discuss it. Most funders are happy to hear from interested organisations and offer advice so don't be afraid to get in touch.

## 2 Don't leave applications too late

This is an extremely common mistake. Make sure you have checked application deadlines and apply for funding well in advance to avoid missing out. Another key error is forgetting to read the small print – you may need a certified statement of income and expenditure if you're applying for a large grant, which has to be prepared by an accountant. You need to carefully read over the conditions of each fund in detail, leaving yourself lots of time for any potential setbacks.

## 3 Show off your organisation

Funders get inundated with applications, so your application needs to stand out from the rest. Highlight what is unique about your organisation and what it offers your local community that no-one else can provide. Don't forget to stress how your project will improve people's lives. Spend time thinking objectively about why your project should get the money over another project. Ask yourself questions like what makes your organisation or project special and make sure you write the answers down in your application.

## 4 Stay positive and don't give up

If your project is worthwhile, someone will want to support it, even if you get a few rejections along the way. Funders receive an enormous amount of applications every year and sadly don't have enough funding for everyone. However, if you are committed to achieving your project's goals and fully believe in them, just keep trying. It may seem easy to try and adapt your project to appeal to certain funders, but in the long run this won't be beneficial to you, your project, or your community. Keep checking Funding Scotland, as new funds often open up, and remember that each funder is different and has its own set of criteria. Get organised, and get that funding. SCVO also has a handy step-by-step guide to getting funding for your projects.

## 5 Be clear about your reasons for applying

While it's important to show your organisation off, it's also important not to get carried away and to be clear about why you need the funding. A common complaint from funders is that organisations haven't actually told them what the funding will be spent on. So, don't get so distracted by how great your organisation is that you forget to say what you need the money for. Be sure to mention any other supporters or advocates who are involved with the project, such as councillors, MSPs and any local businesses, to highlight the breadth of the project within your community. You need to have a clear and well-thought out budget for your project, as well as a solid idea of what a successful outcome for the project is, so that you can update potential funders about this and how you will measure the project's success.

**"Keep checking Funding Scotland, as new funds often open up, and remember that each funder is different"**

**Sandra Hogg is the Funding Scotland information and engagement officer at the Scottish Council for Voluntary Organisations.**

## FUNDRAISING... don't leave it too late



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# What constitutes good practice in fundraising?



Susan Robinson

Fundraising is a very wide term which includes everything from running a raffle at a small event to trying to raise millions to build a new sports centre. However, whatever you are raising funds for, the rules remain the same.

Here in Scotland, regulations apply to the raising of funds for any charitable, benevolent or philanthropic purpose – so not just registered charities. However, there are simple ways for you, your trustees, staff and volunteers to keep on the right side of the law.

Firstly, it's important to understand what you need to raise funds for. Whether to pay for the running costs of your group, to buy some new equipment, to fund a project, to pay salaries and staff costs, or to build a new centre, make sure that everyone is clear where

the money will go, exactly what it is for, and who will benefit.

Understanding why you use each specific fundraising technique is also crucial. If you are seeking to fund a new project, building or piece of equipment, it might be best to approach a grant-making trust. Usually such donations are restricted so can only be spent on the activity the grant was awarded for.

If you need unrestricted income, then fundraising events, support from individuals and major donors may be the best approach.

If you think that a telephone campaign, or on-street collections, are the best techniques then do them well – always be prepared to answer questions from the public openly and honestly.

Fundraising often hits the headlines – not always for the right reasons. Before you, your trustees, staff or volunteers undertake any fundraising activity, please take a look at the Code of

Fundraising Practice to ensure you keep it legal.

The Code of Fundraising Practice, which applies across the whole of the UK, offers guidance on the law and best practice for almost every type of fundraising activity. So, whether you are opening collecting boxes or working with a major company, the code applies to you.

Furthermore, think carefully about any potential risk to your cause.

Almost every fundraising activity involves some risk, ranging from bad weather or volunteers getting sick to a trust turning down your application, you have to decide what an acceptable level of risk is.

So, for example, you might be prepared to risk a small amount of money to test out a new fundraising event, but agree never to do anything which might damage your reputation.

Susan Robinson is the strategic investment officer at CVS Inverclyde.

**"A complaint from anyone can have a huge impact, so have a clear policy on how to resolve complaints effectively"**

It's also necessary to be able to handle complaints well. A complaint from anyone can have a huge impact, so have a clear policy on how to resolve complaints effectively.

Information on how to handle complaints is available from the Scottish Fundraising Standards Panel. Always act swiftly before the complaint escalates.

Don't forget to have a plan. Plan your fundraising activity so that you can continue to meet the needs of your beneficiaries.

Think long term so, if you want to launch a new project in two years' time – maybe speak to potential funders now.

There are many sources of help and support to let you know you are not alone, such as the Scottish Council for Voluntary Organisations, your local Third Sector Interface, and the Institute of Fundraising's regional and special interest groups across Scotland.

Finally, make sure you enjoy it – fundraising should be fun.

## Advertorial

# Get involved with UK Parliament Week 2017! 13-19 November 2017

UK Parliament Week 2017 is set to be the biggest and most successful yet with over 3000 events taking place all over the UK, and over 250,000 people taking part to celebrate and explore democracy and what the UK Parliament means to them.

Join over 70 organisations, schools and uni-formed groups already taking part across Scotland and help this year's UK Parliament Week be the biggest yet. Run an event with your organisation or community to engage and empower people in Scotland to get involved with their UK Parliament and make a difference.

Events can be as big or



as small as you like. They can be open to the public or private events. We've got a free toolkit full of ideas to help you get started. Plus, there's more inspiration on our website where you can explore events and activities in previous UK Parliament Weeks.

Your event could help people learn how the UK Parliament works. It could break down barriers be-

tween people and politicians. It could explore the history of UK democracy. Or it could empower participants to get their voices heard in the UK Parliament. There's a huge range of possibilities to inspire people to get involved in their democracy—from film screenings, to talks, debates and discussions!

You can hold a 'Question Time' Q&A style event

with local politicians, host a debate, run a workshop, celebrate with arts, music performances, and poetry events... As long as your event helps your audience to engage with the work of the UK Parliament, explore its history, and empowers them to get involved, there's no limit to how you can take part in UK Parliament Week!

To register your event, go to [www.ukparliamentweek.org](http://www.ukparliamentweek.org) and complete a simple online form to get your free toolkit, plus UK Parliament Week goodies - including a Big Ben stress reliever! Register by 30 September 2017 to get involved.

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# 6 caterers with a conscience

Got an event to cater but fed up with boring sandwiches? **Jolene Campbell** has found social enterprise caterers across Scotland offering something a little different.

## Punjabi Junction



**Where:** Edinburgh

**What's on offer:** authentic home-style Punjabi cooking which is simple, high-quality food suited to all budgets. The food is cooked in the Leith Walk café and delivered to your chosen venue or can be prepared at your premises. A range of chicken, lamb, fish and vegetable curries are on offer as well as a selection of samosas, pakora and sweet Indian desserts.

**The social bit:** Punjabi Junction is run by charity Sikh Sanjog to provide minority ethnicity women with training and employment opportunities, to help develop confidence and reduce social exclusion, and promote and sustain the Sikh culture in Edinburgh.

**Price:** starters from £3.49 and mains from £4.99.

## Milk



**Where:** Glasgow

**What's on offer:** seasonal salads, whole cakes and hot food from around the globe. Menu choices range from West African sweet potato and peanut stew to Moroccan tagine and Eritrean pancakes with a chickpea and tomato sauce. Whole cakes are sweet with a healthy twist such as Tunisian orange cake, courgette and lime, chocolate Guinness or banana and cardamom. More traditional cake lovers can plump for a baked vanilla cheesecake or a chocolate almond brownie.

**The social bit:** the café provides a safe and supportive environment where refugee and migrant women in the Glasgow community can receive employability support. As the first project of the TinCat Social Enterprise, the café empowers refugee and migrant women who live in Glasgow. It also promotes integration by giving these women opportunities to gain skills, experience and confidence. While gaining work experience women receive continuous support as they prepare for moving on.

**Price:** hot food from £6 a head.

## Social Bite

**Where:** Edinburgh, Glasgow and Aberdeen

**What's on offer:** Social Bite serves up breakfasts, lunch and even hot food such as curry and rice to clients' offices and boardrooms. It offers a full range of breakfasts from continental platters to fruit, pastries, granola and porridge pots. Pick from pastry lunch platters, traditional soup and sandwiches or healthy salad boxes like broccoli, kale and smashed beetroot. There is a range of gourmet to traditional sandwiches and finger foods, like classic beef pie or zingy ginger, lemongrass and chicken skewers. The chef creates fresh new hot dishes each week to cater to different events.

**The social bit:** Social Bite is best known for its chain of cafés but it's the corporate side of the business that best supports the company and employs the majority of staff. Currently 19 out of 75 staff have experience of homelessness. The shops give out free food and drink to around 150 members of the homeless community every day. Regular supper events see homeless people can access free food and help from partner charities. All profits are reinvested to help vulnerable people develop their skills and regain their confidence and dignity.

**Price:** from £2.50 up to £8 a head.



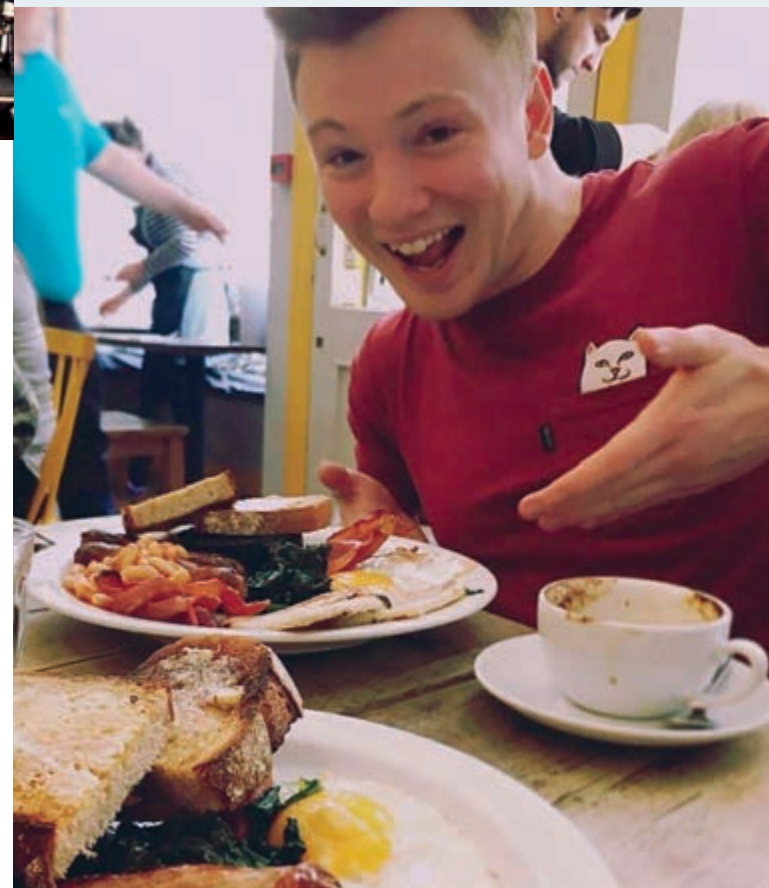
## Edinburgh Larder

**Where:** Edinburgh

**What's on offer:** the Larder delivers a range of catering for office lunches, wedding buffets and birthday events. The menu changes seasonally so all of its ingredients are fresh and in tip-top shape. It specialises in canapés and rustic buffets using the best seasonal Scottish produce. The caterer also provides a special winter menu, seasonal savoury quiches and snacks like organic sausage rolls from Peelham Farm in Berwickshire, veggie rolls from the Isle of Mull, and spicy beetroot and carrot fritters.

**The social bit:** the team behind Edinburgh Larder set up a social enterprise Edinburgh Food Social to bring the benefits of using local food into schools and communities across Edinburgh. After crowdfunding to pay for a truck they plan to take it around the capital and beyond to show what can be done with local food, all year round. They have also teamed up with the Leith Biscuit Factory to put on an affordable monthly food and craft market. All activities are geared towards helping all ages and backgrounds develop their cooking skills and create nutritionally balanced meals using local, seasonal food.

**Price:** canapés from £6 per person.





## Café Artysans

**Where:** Inverness

**What's on offer:** breakfasts and buffet lunches with quirky sandwich options such as ploughman's on a stick with a Branston dip. Soup lunches include homemade vegetarian soups, along with the choice of freshly baked bread and butter, or traditional sandwiches and tray bakes. The popular buffet lunch includes sausage rolls, quiche, samosas, salad bowls, brochettes, fruit and a mini cake selection. The tea break offer is perfect to cheer everyone up at an afternoon meeting, with a selection of mini cakes from £1 per person, office party flowerpot muffins, or freshly baked scones that earned a mention in the Sunday Post's Scone Spy feature.

**The social bit:** Café Artysans currently has over 15 trainees aged between 16 to 25 who have experienced difficulties in the transition from home to school that place them at risk of homelessness or unemployment. They work alongside the professional team who provide learning opportunities to around 200 young people a year. Coffee beans are roasted on site and customers can buy these beans in-store to take home. Every cup of coffee sold at Artysans has helped trainees to learn and master a range of skills, starting when the unroasted beans are delivered to the café and ending when waiting staff bring the coffee to the table.

**Price:** buffet lunches from £7.25 per person.



## Flycup Catering

**Where:** Inverurie

**What's on offer:** themed dining, cold buffet options, picnic lunches and desserts as well as traditional breakfasts or soup and sandwich platter options for business meetings. Function favourites from this award winning social enterprise and caterer include mini quiches, savoury mixed egg selections, lentil loaf slices and fruit kebabs to complement sandwich platters, cold meat platters or filo veggie samosas and spring rolls. Customers have also posted rave reviews about show-stopping celebration themed cakes.

**The social bit:** the business provides catering training, employment experience and employment placements to over 20 adults with learning disabilities. Trainees can get work experience by helping to run the Fly Cup coffee shop and are also involved in outside catering services as well as the production of baked goods supplied to local shops and businesses.

**Price:** £4 per person for groups of under 10 people. It also offers a two course lunch for pensioners on a Tuesday for £5.



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# 10 top tips for trustees



Tracey Bird

There are about 250,000 people who volunteer as charity trustees in Scotland. They are all busy people, often working with limited resources. As well as recognition and appreciation, they also need practical help.

So, if you're one, here's ten top tips to make your life just that little bit easier.

## 1. Recruit right

Board diversity is vital for good governance. If your board is a bit male, pale and stale then you need to shake things up and look at how you recruit. Only 10% of vacancies are advertised, but relying on existing networks means you only get more of the same. So identify any skills gaps, draw up a good role description, and ensure you have an open and transparent recruitment process.

## 2. Get a good induction

A good induction is vital. Trustees need to be fully aware of their legal responsibilities and have an overview of how the board works. They need to know about where the organisation is at, and where it wants to go. Check you've got all the information

you need with the Scottish Council for Voluntary Organisations' sample induction checklist.

## 3. Know your governing document

To be an effective trustee you need to understand your constitution and know your organisation's values, aims, ethos and mission. You need to know, because it's your job to safeguard them, and ensure you stick to them when making any decisions.

## 4. Watch out for conflicts of interest

Many trustees sit on a number of boards or have business interests, some may also be employees of an organisation. This can lead to conflicts of interest. Make sure you have a Register of Interests that all your trustees should sign.

## 5. Behave yourselves

Is your board clear about what is and isn't acceptable behaviour? Make sure all your trustees sign up to a code of conduct to keep them on the straight and narrow. Personality clashes can be common in a sector where passionate people want to get things done. But squabbling and internal power struggles can destroy your organisation. The Third Sector Mediation Service can help resolve difficult situations.

## 6. Understand the finances

You have to get to grips with the money in order to ensure the future sustainability of your organisation. Finance is everyone's responsibility, not just the treasurer. As a trustee

you're a part of a team and you all have collective responsibility.

## 7. Keep up to date

Knowing your legal obligations is vital. Breaching certain laws can have expensive consequences, and as a trustee the buck really does stop with you. Keep up to date and take expert advice where you need it.

## 8. Develop a learning culture

The most successful boards and organisations create a learning culture to avoid repeating mistakes. Think about mentoring for new trustees, a board appraisal structure, and training.

## 9. Know the difference between governance and management

Governance doesn't mean management. Trustees should focus on the big picture and think and act strategically. They should set the long term direction of the organisation, as far as possible, stay clear of making operational decisions.

## 10. Future proof

The world is changing fast and trustees need to ensure future sustainability of the organisation. Make sure you know what's coming up on the broader political and economic horizon, and keep up to date with technology and social change.

Tracey Bird is an information officer at the Scottish Council for Voluntary Organisations. Find the resources she refers to on the Running Your Organisation section of the SCVO website.

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## How Jim Campbell became a Terrific Trustee

**Robert Armour** talks to **Jim Campbell** about turning around the business of cerebral palsy charity Bobath Scotland

**T**he secret to success,” Jim Campbell says “is identifying your own shortcomings then finding people to fulfil those shortcomings. You then sit back in the reflected glory that they bring.”

While that might be an overly modest summary of a hugely successful career, it’s a philosophy that Jim has held dear in both his professional and personal life.

The former chair of Bobath Scotland – the charity supporting people with cerebral palsy – has had a huge influence on the organisation, leading to him winning the coveted inaugural Terrific Trustee gong at this year’s Scottish Charity Awards.

Jim is now 74 and living in “reflected glory” as an ambassador for the charity, but his hugely success-

ful career as a chartered account (he built one of the country’s biggest financial services companies before selling it) has made his services much sought after over the years.

His first foray onto a board came after he became friendly with his bank manager, of all people.

“He liked the way I did business and asked me onto the board of the Clydesdale Bank to help him out,” says Jim.

“For me it was a simple relationship – I alongside others contributed my knowledge and understanding to help the business grow. And we

did that.”

Jim was so successful in fact that despite running a thriving – and rapidly expanding – business himself, he joined the board of one of the country’s best known companies: Reid Furniture.

Jim worked just one day a week as a director of Reid but during his 30 year tenure saw it grow to a business with an £80m turnover and 480 staff.

Yet, he says, it was a chance visit to a Bobath’s centre in the west of Glasgow in 2006 that saw Jim embark on his most rewarding challenge.

“Seeing the centre, the

love, the support and the care given by dedicated staff and families influenced me hugely,” says Jim. “I was taken aback. I had been fortunate in my own life and my children too. I wanted to support it in some way, but I only had business skills so asked if they needed me.”

While the support and care being provided at the charity was not in question, the governance and business-end of the organisation was not great.

“It might sound harsh but I told the board straight they either got rid of their current chair or get rid of me,” he said. “So he went and I felt obliged as the antagonist to take up the role.”

Those kind of decisions, while difficult, are what running a modern charity is about Jim maintains. “You

have to make the tough decisions. If we wanted to support these children and families to the best of our abilities then hard and, what I’d call unpopular, decisions had to be made.”

Hardest of all tasks was changing and developing a whole new business culture within the organisation.

“I’m not being ungenerous when I say Bobath was being run a bit like a church committee when I first came to it,” explains Jim. “It did great work, had great success but it was very thin-lipped and parent-led with the hard decisions being avoided.”

However, with Jim’s expertise and acumen, Bobath turned round from a £192,000 loss into a thriving charity with a nearly £1m income.

As a trustee Jim believes one of his best moves

“He’s not always the easiest of taskmasters, he pushes us all to be the best we can be”

was hiring chief executive Stephanie Fraser, whom he heralds as one of the best leaders he has ever worked with.

“We worked together from day one, developed a five year plan together, worked out our goals and aims and set about delivering them.

“We had a very open and frank relationship and built a very effective partnership. We got to know each other well. We didn’t always agree but we always had respect for each other.”

Likewise Stephanie has been a huge supporter of Jim, which is why when he retired as chair, she decided to put him forward for the

Terrific Trustee award at this year’s Scottish Charity Awards.

She said: “Jim’s commitment to Bobath, its staff and his focus on how we can help more people in Scotland with cerebral palsy has been unwavering.

“He’s not always the easiest of taskmasters, he pushes us all to be the best we can be but it has been my pleasure to work with him over these last five years.”

And if that’s not proof enough, Glasgow Labour MSP Anas Sarwar lodged a motion in the Scottish Parliament praising Jim’s success, citing his knowledge and skills in “turning

Bobath Scotland around.” All of which leaves Jim somewhat perplexed, he tells me. “Credit isn’t down to me,” he says. “I was genuinely taken aback when I won the award.

“I do have a skill in finding the right people,” he concedes. “But we now have a board that in my opinion, is as good as any board in Scotland. We’re not the biggest but we don’t want to be. We want to be best at what we do.”

In terms of being an effective trustee Jim has no doubt about the right approach.

“The important thing is allowing people to get on with their job while being close enough to know what they are doing and why they’re doing it. And being willing enough and honest enough to say what you think without rancour.”



tfn



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# Third sector sustainability: the meaning behind the myths



Graeme Reekie

Sustainability is a growing concern for third sector organisations. Demand on services continues to increase, resources continue to dwindle.

How can we talk about third sector sustainability in this context? It's time to be clear what sustainability means and to dispel the myths that surround it.

The first myth is that money is the answer. The truth is an organisation could have plenty of money but still be unsustainable because of poor governance, unhealthy cultures and so on. It's about more than just money – it's also about quality and capacity.

So, it's ironic that the second myth is that we should say yes to everything that comes our way: tenders, funding, referrals, partnerships etc. In fact, many of the organisations I meet have sustainability challenges because they've said yes too much.

Sustainability doesn't mean keeping things going. Things change – and things end. Talking about sustainability can make it sound like you're arguing for the status quo.

Sustainability means change, adaptation and evolution. And building other people's capacity to



"It's about more than just money – it's also about quality and capacity"

do the same.

The final myth is that third sector organisations can be self-sustaining – its work and impact will somehow carry on when funding ends. Funders and policy makers must address this, because the main determinant of a sustainable sector is the funding and policy environment in which it operates.

Sustainability is therefore not the responsibility of third sector organisations alone. But there are things we can do about it.

## 1. Stem the flow

Carry out projections and share them with your boards and colleagues: how long have you got until the money runs out? Review your costs and ways of working and generate a sense of urgency. Stop subsidising deficits. Instead of using reserves or funding to fill holes in project budgets, subsidise investment

– and be clear on what you expect the return to be.

## 2. Involve others

Share the responsibility, don't try to do it alone. Run workshops for trustees and colleagues, highlighting your challenges and enlisting their help. This can be very successful with external stakeholders too: showcase your impact, tell your story, make a clear request for how they can help you.

## 3. Develop a sustainability plan

Use the free Lasting Difference toolkit to conduct a thorough self-assessment. Get other people's input to prioritise issues and identify actions. Don't just focus on weaknesses either: find your core strengths and

build on them.

## 4. Check your tentacles!

Funding follows activity, so to diversify funding we diversify activity. Spreading our tentacles like this can pull us out of shape. Instead, reconnect with your core purpose – what is your organisation really about? Reunite people around a shared vision for the future – and help them embrace change.

## 5. Do it now

If things are going well, now is the time to plan for the next stage in your organisation's lifecycle. If they're not, now is the time for urgent action.

It's always the right time to talk about sustainability.

Graeme Reekie runs Wren and Greyhound, a consultancy working with charities, funders, social enterprises and public sector organisations.

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The Gathering is the largest free third sector event in the UK. Organised every year by SCVO, it's a place for people working in the third sector to network, showcase what they do and learn from each other. It's also a great opportunity for anyone who is interested in finding out more about the third sector to come along and get involved. There's a bustling exhibition and marketplace with over 100 exhibitors, and a packed programme featuring more than 60 workshops, seminars and training sessions.

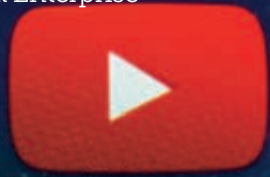
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# Great digital tools for small charities

**Sally Dyson** looks at some of the free digital tools that are invaluable to new and emerging charities

There are lots of ways that technology can help those setting up a charity, but opting for which software to go for to help the running of your organisation can be daunting. Here's a brief guide to get you started.

## Meeting your basic needs

We all need to write documents, use a spreadsheet and prepare presentations – especially in the early days when you're planning, pitching and writing funding applications. There are two obvious options for this: Microsoft and G-Suite. Both offer similar tools and functionality, and it really comes down to personal preference.

## Internal communications

Now your team might be small to start with, but you might be spread out across Scotland. Whatever situation you find yourself in, good internal communications are key. Email is the default communication channel. But think about more modern technologies too. You could use Slack, Yammer or Whatsapp groups to keep everyone up to date

with your organisation's work.

And when you need a friendly face or voice to speak to, get in contact with your team by using a free online video tool like Appear.in, Skype, Google Hangouts, Facetime or Zoom.

## Hello world

It's not just your internal team that need to know what you're up to, think of the outside world.

Not everything needs to be digital. Leaflets and posters in your local community, listings in local magazines or at other community centres are good. However, alongside that, your web presence is something to give careful consideration to.

A website is the obvious place to start, Wordpress and Squarespace offer free, easily updatable website building. However a website isn't always necessarily the right answer. It might be that social media is enough of a presence to get the ball rolling.

## Getting social

You don't need to be on every platform to be noticed – plus you probably don't have the time.

Whether you choose Facebook, Twitter, Instagram, Snapchat or anything else – develop a tone of voice. People want to get to know who is behind the charity – no one likes a robot!

If you do decide to have a presence across several platforms take a look at free management tools like Buffer, Smarterqueue and Hootsuite.

## Plan, plan, plan

In the early stages of setting up a charity there's lots of planning to be done. There's nothing wrong with a Gaant chart but there are lots of great, free tools out there that can help you plan and allocate tasks. Take a look at Asana, Basecamp, Trello and Workflowy to get you started.

Tools like Mentimeter, SurveyMonkey and Google Sheets can help you collect valuable feedback from supporters and service users. Don't forget about Google and social media analytics too.

**To keep up to date with all things digital in the Scottish third sector sign up to SCVO's digital ebulletin at [digital.scvo.org.uk](http://digital.scvo.org.uk).**

# Ensure your charity is cyber resilient



Kyle Usher

The advantage that a new charity has over a large, established one is that getting best practices in place from the outset means that you don't have to scramble around to assess weaknesses and spend time, effort and money on retrospective fixes. Also – when it comes to staff – getting people to stick to good ways of working is easier than trying to change the bad habits that have been built up over time.

For many charities

actions are only taken once a serious threat occurs. In other words: closing the stable door once the horse has bolted.

So what is cyber resilience? Being cyber resilient is both the prevention of cyber breaches and also making sure that if a breach occurs that you are able to respond without losing business continuity. A cyber breach is an incident in which data is lost or stolen. This could be financial data, security data or personal data – such as contact details.

Financial impact is the most obvious danger, but the knock on effects of a data breach can include reputational risk and the inability to provide services.

And that outlines the two

important areas of cyber resilience, practices and people, which are often the greatest threat to your data security and are also the easiest to fix. Here are some practical pointers to help you consider cyber resilience from the outset.

If you are purchasing new computers and software, they should be up to date. If you are purchasing second hand equipment, make sure you update them early on.

When setting up your new systems, get admin privileges nailed from the outset.

As you bring on volunteer, part-time or full-time staff, make sure that cyber awareness is part of the induction process, including passwords, email security, situational awareness, use

and storage of USB drives, laptops and tablets.

Having a secure, trustworthy site is important for security and reputation.

Think about how you store, handle and backup your data. There are lots of options available; backing up to the cloud is very cost effective, or you may want to work solely from the cloud via services such as Google Drive, Sharepoint or OneDrive.

The important thing is to have considered these things before something happens and to know what to do when it does.

**Kyle Usher is digital change manager at the Scottish Council for Voluntary Organisations.**



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# ingredients of change

Wonder why your charity's campaign hasn't worked? **Susan Smith** examines the six elements you need for a successful campaign



## Be passionate

People have to be motivated to take action. Unfortunately, that's often because something bad has happened to them. Charities, however, sometimes campaign because they think they ought to. They spend hundreds of pounds on beautifully designed graphics, t-shirts and photo-shoots, but because they've not actually experienced the injustice themselves, they struggle to persuade others to care.

The Hillsborough Family Support Group is a key example of the importance of passion. The families of the 96 people who died came together to campaign for justice after their family members were blamed for their own death. Margaret Aspinall knew her 18-year-old son James wasn't the drunken lout the media and establishment were saying he was. She remained angry for 28 years after his death until 2016, when a second inquest into the incident laid the blame firmly with South Yorkshire Police and Ambulance Service. All Scottish charities were set up by passionate people with the urge to overcome an injustice, so it shouldn't be hard to muster enthusiasm for social change.

**Top tip: if your charity feels like it's campaigning just for the sake of it, talk to service users and their families. Find out what injustices they face and whether the charity can help them change that.**

## Have a clear vision and ambition

Charities often get confused about what they want to achieve. They say they want to campaign on climate change but aren't clear about how to do that. They would be better campaigning for something more specific, such as better sustainable transport options, renewable energy solutions, the scrapping of unnecessary supermarket packaging, buying local and so on.

The See Me campaign, run by Scottish Association for Mental Health and the Mental Health Foundation, is a great example of an organisation with a clear vision and ambition. It was set up to challenge stigma towards those with mental health problems. It began by challenging the use of discriminatory language in the media, and continues today, with a budget of around £1.5 million a year, to run specific campaigns aimed at key groups. Its latest campaign targets young people with the simple message that it's okay not to be okay.

**Top tip: make sure it's obvious from your campaign name what you're trying to achieve. Think Stop Climate Chaos.**



## Be creative

There's nothing duller than a line-up of politicians and charity staff members in front of the Scottish Parliament. Bringing a bit of creativity with props such as inflatable elephants or well-designed placards can help get a picture in a newspaper, but if you want the public to notice, you'll need to do a bit more. Creativity doesn't have to be expensive though.

In 2014 the British Red Cross wanted to take advantage of the Commonwealth Games buzz to persuade more Glaswegians to get first aid training. It had a £134,000 budget for an advertising campaign, which was mostly going towards outdoor and transport advertising including bus adverts, underground and station adverts, digital boards and roadside ads. It wanted the campaign to have a strong visual identity and humour at its heart so it used the Duke of Wellington statue in Glasgow, with the ever-present traffic cone on his head, faced with a number of first aid scenarios. "Banged yer heid? Nae bother, learn first aid" had the Duke with a pack of peas on his head. "Burnt yer hand? Nae bother, learn first aid" had the Duke with his hand in a pint of cold beer. These proved to be successful and instantly recognisable with the people of Glasgow and beyond.

**Top tip: you'll be surprised by how creative people in your team can be, but if you're struggling, consider approaching creative agencies for pro bono work.**

## Make sure people know what they have to do

In 2011, the Pears Foundation set up a £1.7 million campaign called Give More in a bid to tap into the Big Society idea, where the public would step up to support each other. It asked people to sign a pledge to give more – it could be time or money – and post it on social media. A stark evaluation of the campaign two years later found it failed on multiple levels, not least in its aim to get 500,000 people making pledges. In fact just 50,000 pledges were signed at a cost of £35 each. There was no way of knowing whether any of these people actually gave more. Give More failed because people didn't know what they were supposed to do or who they were supposed to do it for. In comparison, the Charities Aid Foundation (CAF) launched Giving Tuesday in the UK in 2014 on the back of an already successful idea. Giving Tuesday is the November Tuesday directly after Black Friday and Cyber Monday. CAF works with charity partners, such as Cancer Research UK, to get them to make the ask. It's clear what you have to do: give money (or volunteering time) to a particular charity on this particular day.

**Top tip: help your supporters back your campaign with easy asks.**







## Stress the heart and humanity of your campaign

Campaigning is about changing lives for the better, but they must touch hearts. In 2011, the Scottish Refugee Council wanted to celebrate the 60th anniversary of the UN Refugee Convention. It made a film highlighting the similarities between refugees 60 years ago and today. When the voices of Rosa Sacharin, a Jewish lady who came to Scotland during the Second World War and Christian Kasabandi, a young man who came to Scotland as a child refugee from war-torn Congo, merge into the same story, it is an emotional reminder of the importance of welcoming refugees.

**Top tip: put the people experiencing injustice at the heart of your campaign.**

## Make sure you've got lots of partners to back your campaign

Many of Scotland's most successful campaigns have been done in partnership. Change happens when there is a swell of public opinion backing it – politicians are only motivated to make a change when they see people care about it. If your charity has done everything right but hasn't found anyone else to support your cause, then the campaign is likely to fail. WWF runs Earth Hour, the world's largest demonstration of support for action on climate change. Every year, millions support the event, and it enjoys backing from the likes of Andy Murray.

**Top tip: create a list of partners to involve in your campaign.**



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