

tfn Guide ²⁰¹⁸

TO RUNNING A CHARITY OR SOCIAL ENTERPRISE

Kings of the castle

**Blood Brothers:
Scottish Charity
of the Year 2018**

Plus:

**Scotland's
Governance Code**

**Closing thoughts:
winding down
a charity**

9 faces of the future



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 – Franklin D. Roosevelt

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Susan Smith

Welcome to the TFN Guide to Running a Charity or Social Enterprise 2018. This annual guide is packed full of information that will help you run your organisation better. This year, it has a broad governance theme. There are loads of hints and tips on recruiting and upskilling trustees and advice for board members on how to effectively govern their organisations.

Key to this is the publication of the Scottish Governance Forum's Governance Code for the Third Sector, which can be found as a pullout in the centre pages of this magazine. Pat Armstrong, chief executive of the Association of Chief Officers of Scottish Voluntary Organisations, outlines why this has been created now, while Tracey Bird of the Scottish Council for Voluntary Organisations explains how your board can make use of it.

The main feature is on Blood Bikes Scotland, which won Charity of the Year at the Scottish Charity Awards 2018 and highlights how to succeed through rapid growth. After launching in 2015, it increased its income from under £10,000 to nearly £100,000 in 2017.

2018 has been Scotland's Year of Young People and as such we've seen a focus in the third sector on engaging more young people in our organisations. We're increasingly seeing major charities and social enterprises recognising the skills and insights that young people can bring to their board rooms. That's why we're also featuring nine charity trustees under the age of 25 in our Faces of the Future article – check them out to see who could be your next boss.

This has also been a year where climate change has rarely been out of the headlines. TFN believes third sector organisations understand a sustainable environ-

ment is key to their charitable or social purposes. But we also know we can all be a little bit greener, so we've created a list of 10 things you can do to reduce the carbon footprint of your organisation – how does meat free catering sound?

Look out for our Charity Bank Account comparison table, which examines high street banks alongside ethical financial bodies. If you're looking for a new account or setting up an organisational, this could be invaluable.

We also have a directory of trusted social suppliers at the back of the publication if you are looking to ensure procurement policy contributes to the social economy.

If you find this guide useful, remember there is more content like this on our website at thirdforcenews.org.uk and in our regular monthly magazine.

TFN monthly magazine launched in August this year and is full of in depth analysis of what's going on in the third sector. We've examined charity status, the role of charity shops, explored funders attitudes to the sector, and looked at how the international aid sector has responded to the Oxfam crisis.

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Enjoy the TFN Guide to Running A Charity or Social Enterprise 2018.



We're increasingly seeing major charities and social enterprises recognising the skills and insights that young people can bring to their board rooms.

BLOOD BROTHERS

Gareth Jones meets the chairman of Blood Bikes, which was named Charity of the Year 2018 at the Scottish Charity Awards, to hear its inspirational story

Getting involved in a new charity can be a daunting prospect, but the rewards can be striking, as John Baxter of Blood Bikes Scotland has found.

The charity only began operation in 2015, but since then has gone on to save the NHS tens of thousands of pounds and earlier this year scooped both Charity of the Year and the People's Choice Award at the Scottish Charity Awards after increasing its income tenfold in 2017.

As chairman of the board, John's face lights up as he reflects on how choosing to volunteer for the charity, which provides a free of charge medical courier service to NHS hospitals and hospices in the Lothians and Borders, has been a life-changing experience for him.

"My daughter, who is 18 now, has known for a little while that my work life wasn't great," said Baxter, who previously worked in the banking industry. "But after being a part of this, and it culminated during the awards, she came up to me and told me that



It was very difficult to take it from something to nothing. There was a lot of persistence, contacting people repeatedly

John Baxter

she was really proud of what I had done. That for me was an amazing seal of approval for what we have done and how we have done it."

Blood Bikes was founded in 2012 by a group of three keen motorcyclists who were looking for something different to do with their spare time.

After seeing an advert on television for the English equivalent of the service, the National Association of Blood Bikes, one of the founders, Brian Fraser, decided the service could benefit Scotland too.

He contacted the chairman of the group in England, had a meeting with him and was told there was no equivalent in Scotland, despite Blood Bikes schemes operating around the world for 50 years. From that point, they were sure they were on to something.

"There was a real opportunity to create an equivalent group, but it was very difficult to take it from something to nothing," said John who joined the team later. "There was a lot of persistence, contacting people repeatedly to get the right person to speak to. Brian was literally phoning the NHS on weekly basis, chasing them up con-



stantly to try and get them on board and telling them what we wanted to do."

The service was launched in Dumfries in 2015, expanded to Edinburgh and the Lothians at the end of 2016, and is now set to arrive in Fife. It is run completely by volunteers, with all funds raised going directly to the service.

John may not have been one of the founding members, but he found himself heavily involved after taking early retirement less than a year after

becoming a rider.

"I signed up as a rider at a bike show in Ingleston in March 2016, but had to wait until the December to become involved on a day-to-day basis," he said.

"I became more interested in what was happening within the group. Then my wife picked up the role of controller one weekend, and that's when we both started to get more involved. In March 2017, the chairman stood down and I said I'd be interested in finding out more. Twenty minutes later I was told I was the new chairman!"

Blood Bikes riders outside the Scottish Parliament – the charity increased its income tenfold in 2017, has expanded from Dumfries to Edinburgh and the Lothians and is set to cover Fife.



Some of the Blood Bikes team at this year's Scottish Charity Awards, with host Sally Magnusson

Blood Bikes riders are responsible for transporting vital medical supplies – such as tissue, blood samples, and breast milk for premature babies – between medical facilities. Without it, these supplies would have to be carried by taxis or specialist courier services.

Blood Bikes is able to respond quicker, faster and because it's a charity it is saving the NHS literally thousands.

As one grateful carer said: "This is a truly amazing charity. My husband and son are disabled and both require artificial ventilation at home. Life is not easy. My husband's ventilator broke down this morning requiring a part.

"He has had 20 hospital admissions in the past 18 months and only came home from hospital in Newcastle seven days ago. Blood Bikes Scotland delivered the required part within two hours, meaning that a further hospital admission was avoided and we have been able to remain at home as a family."

One of the most striking aspects of Blood Bikes' rise to prominence has been its recruitment of volunteers. In just over the year, its volunteer numbers grew from 15 to more than 60.

"This was born from a group of motorbike enthusiasts who wanted to find something to do and put back in to the community," said John.

"The bikes make that very easy to do. Riding is something that we all enjoy when it doesn't have a purpose. So when you add a purpose to it, it becomes even more enjoyable. Bikers travel hundreds of miles just to get out, and perhaps to enjoy cake and coffee. So asking them to do what they love for a good cause is pretty easy."

The recruitment was all done through

leaflets and word of mouth, and through advanced motorbike groups mainly, who were natural targets for volunteering.

"It's changing a bit as we're now running adverts for people to help us on the phones too," explains John. "For what we call controller roles. They staff the phone for us and are our contact with the NHS.

"That's where we've been getting more family members involved. In the Borders, though, we're about to get our first female rider. She's just passed her advanced test and is going to join us soon. That's a real positive thing to see."

The highlight of the charity's amazing year was winning two categories at the Scottish Charity Awards, with both the judges and the public giving their backing to the work of Blood Bikes.

"We were blown away on the night,



Riding is something that we all enjoy when it doesn't have a purpose – so when you add a purpose to it, it becomes even more enjoyable

John Baxter

and I'm still amazed and shocked that we picked up the two awards," said John. "The People's Choice was the confirmation and the affirmation that people are seeing what we are doing.

"It's a simple concept and a simple operation, but people are seeing the value in it and they understand we do more than just the A to B side of transporting things."

The organisation now includes the awards logo on its emails and other correspondence and has found both financial and practical support has increased since winning.

"We've had a couple of companies and organisations approaching us saying they've heard about what we do, they love it and ask how they can help. That has been financial mostly, but we also were offered digital and fundraising skills support from Street Soccer Scotland (last year's Charity of the Year winner), which is amazing."

It's been an amazing few years for Blood Bikes, but the charity is determined to do more. It recently gained £15,000 from Scotmid Co-operative's Community Connect to expand its services into Fife, for example, and also has plans to move into the Forth Valley.

But what advice would John give to other people just staring out or trying to grow a charity?

"Looking back through what the guys here have done, the main thing is that you've got to have tenacity. You have to have a passion and belief in what you're doing.

"It might sound a bit corny but if the founding guys hadn't been on the phone to the NHS constantly, this would never have happened."

A recruit's view: "I was taken by their enthusiasm"

Philip Dodsworth is an example of one of the many motorcycle enthusiasts who has decided to volunteer for Blood Bikes.

Recruited at the Scottish Motorcycle Show – a key event for the charity in connecting with experienced riders – the 57-year-old was aware of Blood Bikes but did not know they operated in Scotland.

"I have a friend in Durham who is a biker and rides with the group in Northumbria," Philip said.

"I had heard of them but I didn't really know what they did. But as soon as I spoke to them I was taken by their enthusiasm."

Having retired from a career in IT, Philip felt that the charity offered him the chance to spend his time helping the community.



"I retired at the end of December last year, having worked for Hewlett Packard for many years. I wanted to do something for charity, and that I could help out a good cause whilst riding my motorbike really appealed to me.

"I love it, volunteering for them has been great. I have gone from doing

things that other people wanted me to do at work, to doing things that I want to do for other people."

Philip has mainly been working as a controller for Blood Bikes since he joined, and also providing admin support, but is planning to begin riding once he has completed his Advanced Motorcycle Training.

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Charities help people cope, through the expertise of trained staff and the compassion of volunteers

Are you telling people how truly brilliant you are?

Charity is not a new concept, it can be traced back thousands of years. Generations before us have come together to respond to challenges and hardships in society, and to support those in need.

As society has developed, so too has the charity sector. The challenges and problems we face may have changed, but one thing remains the same: at its heart charity is about making life better for others.

In Scotland we are incredibly lucky to have such a diverse, talented and innovative charity sector. Charities touch on almost every aspect of our lives: from a fun day out with the family to adopting a pet or receiving support when we are ill, I doubt if there is anyone who hasn't personally benefitted from the work of a charity.

But charities don't just provide benefit on an individual or community level. They play a crucial role in influencing and shaping national policy in Scotland. They are a key partner of the Scottish Government and we welcome the insight, challenge and experience they bring to policy making and implementation. I have seen the benefit of this collaborative relationship in every min-



Aileen Campbell MSP

Scotland's charities need to tell real-life stories of how they are transforming communities

isterial post I have held, from early years to sport and health. Without the third sector we simply cannot achieve our ambition of creating a fairer and more prosperous society.

Charities are playing a crucial role in our society but we can see from the Charities Aid Foundation's latest report that there is a lack of understanding among the public about the charity sector. The report found that while four in five have used a charity service in the past year, 27% were not aware that they had.

It is vital that the public understand modern charities and the impact they have on their lives if they are to keep supporting the sector. We know that people in Scotland are incredibly generous with both their time and money. Last year we gave an estimated £1.2 billion to good causes and volunteered over 135 million hours of our time.

But this support cannot be taken for granted. We know that while trust and confidence in the sector is high, it has declined. If support declines that means less money and less time being donated to good causes.

In response to this, charities need to tell their stories – not just sharing stats and facts – but capturing and articulating the real life stories of individuals whose lives have been changed, the families that have been supported, and the communities that have been transformed.

Painting the full picture of what is achieved and delivered by charities helps make our communities even better places to be and our lives a little easier.

For instance, the Haven in Forth in my constituency is a shining example of how the charity sector makes a difference.

The diagnosis of a life limiting illness can be devastating, but what the Haven does, through the expertise of trained staff and the compassion of its volunteers, is help people cope and support them to face the future with hope. Its services may be free of charge, but its impact on the lives of others is priceless.

That's just one example of the inspiring work done by charities in Scotland – there are countless others and if we lose them, life would be all the poorer.

It is time to move away from the public having an awareness of the charity sector to active engagement and involvement, and that happens when people have a real, emotional connection with a cause.

Aileen Campbell is Scotland's cabinet secretary for communities and local government.

Five questions every trustee can ask about investments



Heather Lamont

You don't have to be an investment expert to exercise good governance over your portfolio

Are we clear about what we want our investments to do for us?

Whether you're choosing between existing charity investment funds or asking a portfolio manager to select investments for you, it's critical that you know what your priorities are. Are you looking for inflation-beating returns to give you a useful income stream every year and capital growth over the long term? Or is this a savings pot that you'll spend in a few years' time? These are very different financial tasks. There's no great mystery about what sort of portfolio will do the job you're looking for, but you need to be explicit about what that job is.

Is the portfolio behaving as we expected?

If you have been clear about your objectives and the portfolio is a reasonable match for those, there shouldn't be any nasty surprises. If you really can't afford any risk to your capital (because you're planning to spend it) then you can't expect to get much income from it. Conversely, long-term investors can expect a decent annual income and capital growth over time, but that growth won't come at an even pace – it's normal to see the portfolio value fall back sometimes.

Are we addressing any reputational risk?

There's no need to spend hours philosophising over what's ethical and what's not. It should be pretty obvious if investing in certain industries would leave your organisation at risk



As a trustee you're expected to be honest, diligent and use your common sense – the same principles apply when it comes to your charity's investments

of reputational damage. And if that's the case, there will be plenty of other charities in the same position, so there will already be funds you can invest in that are a sensible match for both your financial and ethical needs.

Are we accessing investments at reasonable cost?

Professional expertise costs money, but you don't want to pay over the odds or to pay for things you don't need. The lowest cost route to a managed portfolio will usually be through an existing charity specialist pooled fund such as a common investment fund. If instead you want to pay a portfolio manager to put together a segregated portfolio specifically for your charity, you'll need to take into account the cost of any funds they select as well as the manager's own annual charge. A segregated approach comes with extra complexity and administration as well as extra costs, so be prepared to explain why you need these.

What are our responsibilities as trustees?

As a trustee you're already expected to be honest, diligent and use your common sense (charity law and OSCR have plenty to say on what this means, but that's the gist.) The same principles apply when it comes to your charity's investments. You are also required to have regard to whether the investments are suitable, and appropriately diversified (meaning that you have a good spread of assets rather than all your eggs in one basket). Unless you are able and willing to run such a portfolio yourselves, you'll be expected to call on the skills of an investment firm or adviser.

There's lots more detail in the Charity Commission's guidance CC14 Charities and Investment Matters – A guide for trustees. OSCR is currently working on its own version. But in essence, if you are addressing the five questions here, there's no need to be nervous when it comes to investments.

Heather Lamont is a client investment director at CCLA.



1 Go paperless

Giving up paper is an obvious first step in becoming more environmentally friendly. There are many ways to maximise your organisation's reduction in paper use.

Consider turning external communications like newsletters and leaflets into PDFs and share them digitally instead, also saving in mailing costs. Swap paper bills and statements for digital ones – not only will it reduce the mail your organisation receives but your records can't get lost or misplaced. You can also sign documents electronically to eliminate the need to print for a physical signature.



2 Considerate catering

When organising outside catering, choose suppliers who source their food locally to reduce food air miles. Go one step further and pick vegetarian or vegan options to maximise the reduction in carbon emissions by eliminating those that come with meat production.

In the office, maybe you could introduce a meat-free day to bring everyone together in your organisation's efforts to be eco-friendly.

10 STEPS TO A GREENER ORGANISATION

It's not looking good for our planet, but there are some simple changes you can make as a business that will ensure you're not adding to the problem

3 Recycle more

Make sure your office has the appropriate recycling bins, including food waste. This will ensure that materials go to the correct recycling unit to minimise your organisation's contribution to landfill. Watch Resource Efficient Scotland's webinar on motivating staff to recycle better.

In the longer term, make



sure that furniture and computer equipment is recycled appropriately. Change Works's list has a range of initiatives that recycle your IT equipment securely.

4 Calculate your carbon footprint

Saving the environment may not be your charity's primary goal, but a more sustainable planet will provide a better future for your service users. So take your head out of the sand and look at how you operate as a business.

You can measure your workplace emissions footprint to identify where cuts should be made and measure the progress of any changes.

Try the Carbon Trust's Footprint Calculator which is designed specifically for small and medium enterprises.



5 Support responsible suppliers

Recently, Scottish Power announced it will become the first major UK energy supplier to generate electricity from 100% wind power following the sale of its final gas and hydro stations. With the energy you do use, your organisation can choose a provider who is conscious of their



own environmental impact. This list ranks UK energy suppliers by their CO2 emissions to help you make an informed choice.

Think more broadly about what kinds of suppliers you use – where can you use your purchasing power to support businesses that are also limiting their carbon footprint?

6 Source quality second-hand goods

Don't forget about bigger or longer term items in your efforts to reduce carbon emissions.

When your organisation is expanding or moving

premises, consider sourcing second-hand furniture which will be cheaper as well as better for the environment.

There are many organisations which offer second-hand or recycled office furniture across Scotland and can also help to repurpose your existing equipment.



7 Maximise energy efficiency

As winter approaches, block up drafts and close windows to ensure the building heating operates at its most efficient. Have a sustainable strategy in place for the long term too – the Carbon Trust can conduct energy audits where they examine your office to assess your resource efficiency and identify where the best carbon savings can be made.



8 Save energy

The Carbon Trust says that even low or no-cost actions normally reduce an organisation's energy costs by 10% so make sure you're making maximum savings – in emissions and in money.

An easy way to get started is to switch to LED lighting which use approximately 15 times less electricity than halogen lighting. Another is to use rechargeable batteries in place of disposable ones.



10 Educate yourself

To develop your skills in leading carbon reduction, the Edinburgh Centre for Carbon Innovation hold seminars and provide online training. Additionally, 2050 Climate Group runs the Young Leaders Development Programme, an opportunity to develop climate change awareness and leadership skills in the next generation of Scottish leaders. Visit 2050 Climate Group at 2050.scot.

This article, including links to loads resources, can be read online at thirdforcenews.org.uk/lists/go-green

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Let's prove how vital volunteering is to charities

Volunteering participation in Scotland has remained largely static over the last ten years, with just 28% of adults volunteering in 2017. If we're serious about driving participation rates and inspiring new audiences to volunteer, we need to start shouting about the incredible impact that volunteering can have on volunteers, on our organisations and on wider society.

As volunteering professionals, we often lament that we're not listened to, our departments are not invested in and that volunteering is undervalued by our organisations. But what are we doing about it?

Are we demonstrating to our senior leadership teams how volunteering helps achieve our organisations' strategic objectives? Surely that would grab their attention and put volunteering on the map. As volunteer programme managers, we should spend less time on day-to-day transactional work and more time evidencing the impact that volunteers make. Until we do that, we won't achieve the profile and investment that volunteering deserves.

We need to get better at sharing the positive impact that we know volunteering has on our organisations. We need to showcase to leaders, volunteers, stakeholders and the wider world that volunteering is crucial, not only to volunteer-involving organisations but to achieving the outcomes of a better Scotland. It makes sense and is worth investing in. In order to achieve that and to get the attention of senior leadership and funders, we need to gather and share evidence of impact.

Last year the Scottish Volunteering Forum established a volunteering impact measurement sub-group in order to raise the profile of impact measurement amongst volunteer-involving organisations. The group created and distributed a questionnaire amongst volunteer-involving organisations across Scotland. The results of the questionnaire were revealing and demonstrate that a lot more needs to be done to evidence the impact of volunteering.

Responding to feedback from the questionnaires, the forum has developed a new guide which helps volunteer-involving organisations to start, or improve, their impact measurement prac-



Volunteering activity is routinely left out of the planning stage



Morven MacLean

Volunteering managers should use new resources to measure the impact of volunteering on their organisation

tices. We're launching the guide along with a brand new guide for funders, also developed by the forum.

Unfortunately, we often find that volunteering is not afforded the value or recognition that it deserves. Despite all of the significant benefits detailed in our new guide for funders, we find that volunteering activity is routinely left out of the planning stage by funders, funding recipients and policy makers, which often means that it is under-resourced and under-measured. The guide for

funders demonstrates the significant benefits that volunteering provides and explains why volunteering is a sound investment. It also highlights the importance of adequate and realistic planning, budgeting and measurement to ensure that volunteering activity is successful.

It's vital that volunteer-involving organisations develop ways to measure the impact of their volunteering programmes in order to improve performance and demonstrate the value of volunteering both internally and externally. We need to understand what's working and what's not; and to act upon any lessons learned so as to drive the quality of volunteering in Scotland.

The more we demonstrate the impact of volunteering on organisational performance, government policy and wider societal/community impacts, the easier it will be to secure funding for volunteering. The more we demonstrate the impact that volunteering has on volunteers, the more likely it will be that current volunteers continue to volunteer regularly and that non-volunteers start volunteering.

So pledge to make impact measurement more important to you. Check out the new guides and start measuring the impact of volunteering. You never know, the evidence you gather could be transformational for your volunteering programme, your organisation and for wider society.

Morven MacLean is volunteer manager at Children's Hospices Across Scotland and a member of the Scottish Volunteering Forum.

It takes more than policies to create a respectful workplace



Eric Gilligan

Following the #Metoo movement, charities need to create environments where sexual abuse or harassment cannot survive

Allegations of appalling sexual abuse made against the American film producer Harvey Weinstein and the subsequent #MeToo campaign through social media have highlighted the continued prevalence of sexual harassment in workplaces globally.

Closer to home, revelations late last year about the behaviour of male guests towards female workers at the Presidents Club event caused a major scandal and ultimately led to the winding up of the charity. Even our own Scottish Parliament has not been immune from allegations of abuse of power by way of sexual harassment of workers by senior politicians.

In addition to the clear issues of reputational damage and exposure to legal claims, the adverse impact on issues like engagement, productivity, retention and employee mental health in workplaces where sexual harassment is unchecked has also come to the fore. This provides fresh impetus for employers to consider how they might proactively deal with the issue and foster genuine dignity at work.

In terms of practical measures having in place clear policies and procedures is a basic requirement. Policies must spell out what is meant by sexual harassment and prohibited conduct, including victimisation for rejecting or complaining about harassment.

They must also make the disciplinary consequences of infringement clear. In addition, accessible and sensitive channels for reporting infringements are crucial. Even if policies are in place what can be more challenging is to ensure that these are observed and enforced within the organisation. This requires a clear commitment to regular training of employees and managers and for the latter to take a lead on the issue as well, not least by example in terms of their own conduct.

On top of the usual policies and procedures overseen by HR, charities may consider introducing a broadly representative oversight committee designed and tasked with monitoring the issue of sexual harassment. They can report to senior management on the operation of the system, which can be a useful mechanism. This kind of approach can ensure the ongoing audit of the system, identify areas of weakness and any

improvements required, and can also help to keep awareness of the issue front and centre throughout the organisation.

Other issues which merit attention are those such as contractual confidentiality arrangements, commonly referred to as Non-Disclosure Agreements (NDAs). The Weinstein case, among others, has highlighted the use and abuse of such provisions by employers and their legal advisors on settlement of claims of sexual harassment. There have been calls from, among others, the Women and Equalities Committee of the House of Commons to clean this up and avoid circumstances where victims of sexual harassment are unreasonably silenced and the perpetrators are allowed to escape the consequences of their actions.

The achievement of real cultural change in tackling sexual harassment is no small challenge but in order to mitigate the risk of legal claims, improve employee engagement and avoid potentially catastrophic reputational risks, it is likely to be a necessary objective for the next generation of organisational leaders.

Eric Gilligan is head of employment at Stronachs.

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Safeguarding: what does it mean for your charity?

For some charities the term safeguarding may not have come up much before early 2018, when the Oxfam abuse scandal hit the headlines. That led to public indignation and significant criticism of the charity's approach to ensuring the safety of staff and beneficiaries – and the measures it took in response to reports of staff using prostitutes in Haiti in 2011. The response was viewed as falling short, particularly where individuals were able to go on and carry out similar work elsewhere.

The events reinforced from a public trust and regulatory perspective that charities must ensure the highest standards to safeguard people with whom they work.

Safeguarding advice was published in the form of OSCR guidance (focusing on children and vulnerable adults) and the Charity Commission's guidance (with a wider focus).

The issue also reinforced an expectation of transparency within the sector. People expect charities to think about these issues in advance, and take appropriate and reasonable action when incidents arise.

So, what can the rest of the sector take from this? It boils down to three simple principles.

Firstly, identify risk. Is your charity working with vulnerable people? What other categories of people is your charity looking to safeguard (employees, volunteers etc)? It is also important to consider other charities your organisation works with and the impact they can have on children and vulnerable adults. Identify where risks lie, be that risk of bullying, harassment, being taken advantage of, sexual exploitation or otherwise.

Secondly, implement policies and procedures. Make sure you put policies in place. These will set out for trustees, staff, volunteers, beneficiaries and others how it is that the charity is dealing with risk relevant to safeguarding.



Robin Fallas

The Oxfam scandal brought the issue of safeguarding to the public attention, but what does it mean for Scottish charities working in local communities?



A charity is going to need to be in a position to justify that it has done the right thing – it may find that difficult if there is a safeguarding breach

They will know how incidents are to be reported and dealt with and what will be done in various circumstances (including reporting to other regulators such as the Care Commission). Importantly, ensure clear lines of accountability and responsibility.

Thirdly, ensure you have living policies and procedures. Paper policies are not enough. You need everyone involved to understand what is expected of them, to be trained and to understand that it is the culture and environment the procedures create that is the safeguard. Also, importantly, if a breach or incident does occur, you should be pro-active in looking at what needs to happen to prevent a repeat.

In relation to employment law, employment, consultancy and volunteering contracts should pick up the importance of adherence to safeguarding policies. Also, be careful around use of settlement agreements (invariably containing confidentiality obligations) when terminating someone's employment. A charity is going to need to be in a position to justify that it has done the right thing – it may find that difficult if there is safeguarding breach which leads to a settlement agreement rather than a disciplinary investigation or finding.

Under OSCR's notifiable events regime, trustees notify OSCR of events likely to have a significant impact on their charity. In the context of safeguarding (and in addition to obligations to report matters to the Care Inspectorate or otherwise), an incident of abuse or mistreatment of vulnerable beneficiaries may constitute a notifiable event. OSCR has made it clear that it wants to know about issues which could seriously impact the reputation of a charity, given that damage to reputation is likely to have a significant effect on a charity.

OSCR should be given an overview so it can understand the incident, the way it has been managed it and the steps the charity will take going forward, but without disclosing personal details or inaccurate information.

Some charities still seem worried about notifying OSCR. It is, however, a step that operates to protect trustees. Also, generally across the sector, the fact that charities are taking this step should actually increase public trust that incidents are being identified and dealt with.

Robin Fallas is a partner at MacRoberts LLP specialising on advising on third sector matters.



Science Saturday at the National Museum, a new collaboration between RSPB Scotland and National Museums Scotland

Power from partnerships

Earlier this month, the Association of Charitable Foundations reported an increase of 10.9% year-on-year in funding from charitable foundations – a new record. It highlights the increasing role foundations play in providing support for the third sector.

This year, the ScottishPower Foundation has supported 17 charities across the UK, from Aberdeen to Sussex, with funding of more than £1 million. The aim is to make a lasting contribution to society and enhancing people's lives. We know that our financial contributions make a big impact but it's equally important for us to provide strategic support too.

In the third sector, having an influential network and the ability to leverage your relationships with decision makers is vital to sustaining success. Getting the right partnerships in place can be transformative for third sector organisations and really accelerate their growth strategies. That's why the ScottishPower Foundation creates opportunities for our funded projects to meet, network and learn from each other.

A good example of this in practice is a new collaboration between RSPB Scotland and National Museums Scotland. We knew from our long-term relationship that both of them have vast amounts of knowledge and insights into how we can make our lives more sustainable.

That's why we were able to bring



Mike Thornton

How the Scottish Power Foundation plays its part

them together to share their expertise and extend the reach of their work. In October, they joined forces to deliver a Science Saturday, one of a series of special events run by National Museums Scotland, which focuses on themes that highlight science, technology, engineering and maths. Using plastic litter collected by the RSPB Scotland team as part of its Dolphinwatch programme, which encourages the public to take part in protecting the local marine wildlife in Aberdeen's Torry Battery, both organisations provided an educational demonstration for children and adults on the dangers to wildlife from man-made debris and the importance of recycling and reusing.

It was a resounding success, educating the public on the fantastic work

both charities carry out in communities across the country.

In November 2018 we will be bringing more of our funded projects together for the ScottishPower Foundation Lecture, which we're hosting this year in partnership with the National Theatre of Scotland (NTS). Our headline speaker is futurologist Mark Stevenson, the Futurist in Residence for NTS who will, with one of the young beneficiaries from our Outward Bound project, consider the many challenges facing young people in a rapidly changing world. It's a chance for everyone to think about the future as well learn from the successes of other charitable organisations.

The third sector has been subject to huge change in the last few years. This year alone charities have had to come to terms with new General Data Protection Regulation legislation, the shockwaves of major scandals arising from failures to safeguard vulnerable people and prevent sexual harassment and the impact of everyone tightening purse strings amid the uncertainty of Brexit. Who knows what will come in 2019?

Nobody has a crystal ball (not even a futurologist) but by working together and sharing our knowledge through great partnerships we are confident that we can help the charities we support to grow and thrive.

Mike Thornton is chair of the ScottishPower Foundation and group director of operations at the Energy Saving Trust.

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Enterprising endeavour aims to inspire innovation

My first experience with Just Enterprise was as a client, so it makes my current role helping to promote it even more rewarding. This expert training and support, funded by the Scottish Government, allows social enterprises and charities to reach their full potential, creating a more inclusive economy for everyone.

Earlier this year the Scottish Government published an independent evaluation of Just Enterprise, which is delivered by a partnership of 10 social enterprises across all 32 local authority areas.

The evaluation found that the support offered – mostly a mix of one to one consultancy and workshops – broadly followed the distribution of social enterprises across the country. Pleasingly, feedback from over 400 clients indicated that 81% were satisfied or very satisfied with our level of expertise.

Satisfaction levels were also high for the quality of our service, the relevance and timing of support, and our methods of engagement. 80% of recipients also felt that Just Enterprise had improved their confidence, motivation and aspirations to grow.

As one client reported: “The whole experience has allowed us to proceed full of confidence that the project is equipped for success.”

The evaluation indicated more than just the feel-good factor though: clients also said that our support helped them safeguard or increase turnover, and protect or even increase paid posts and volunteer positions.

Support helped some enterprises to make cost savings, increase their profit and secure social investment. Of those who reported an increase in turnover, the average was an impressive £50,000.

Over the course of the past seven years, Just Enterprise partners have had to adapt and innovate in response to the needs of the sector. Innovations included account management for supported businesses, business recovery for organisations facing significant risk, tendering advice for those bidding for public contracts, plus pre-investment support and guidance on how to access loans.

We also introduced a Lift Up service to bridge the gap in support between social



Zahra Hedges

How 10 social enterprises have worked together to build skills and confidence across the whole country

entrepreneurs startups and established social enterprises.

Overall, we were very pleased that the evaluation gave us a thumbs up for delivering a nationally consistent service, with the added advantages that our partnership approach brings, particularly local knowledge and flexibility of approach. Although the application process itself could benefit from a refresh or simplification, the single point of entry for clients was seen as important.

However, Just Enterprise isn't complacent. As a consortium, we're still learning and always will.

We're already looking at the ways we deliver assignments, clarity around the question of “what next?” for organisations finishing up with us, and improved marketing.

The complete evaluation is available at gov.scot/publications

If you are interested in finding out more about Just Enterprise contact Zahra on 0141 425 2941 or visit justenterprise.org.

Zahra Hedges is business development officer at Just Enterprise.

The current Just Enterprise contract expires in May 2019 and the Scottish Government will be issuing a new tender around the new year.

get involved



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Leading for the future of the third sector



David Bryan

As the role of the third sector evolves, how do we ensure our leadership and governance is fit for purpose?

For generations we have grown used to the state providing for our needs, but public sector provision is increasingly being replaced by social enterprise and charity models.

As the third sector grows in meeting more and more complex needs, and increasingly delivers public services, we can also expect the sector's governance and leadership to come under increased scrutiny.

On many counts we do pretty well as a sector, including gender balance in the boardroom, ratios between highest and lowest earners and our green credentials. But key issues remain, and they are tough ones to tackle.

A good example is the lack of representation of young people on boards. If directors reflect the communities they serve they're arguably more likely to understand and meet their community's needs.

It's not easy to do though, and fast-tracking young people into senior posts or boardrooms will not end happily. We can engage the skills of young people though, perhaps in short-life working groups, where skills like social media might be lacking on boards.

The financial reality of being young

today means that volunteering may be a luxury. However, there is scope within charities to pay board members for specific project-related work, and Community Interest Companies can have salaried directors. The value gained from paying ten directors for specific projects may be greater than one full-time post-holder – and it creates an opportunity to ensure diversity and inclusion.

Our experience of working with young people is that they instinctively get social enterprise and are keen to be involved, but they need an invitation to get involved as directors

It's critical that an organisation's board helps it to thrive, and much of its ability to do that comes down not just to the experience and skills of directors, but to their mindset, attitude and leadership.

The Social Enterprise Academy has been working with young people to look at the qualities needed to be a director. It was clear that there is an appetite amongst young people to get involved with boards – the programme booked up in a few days.

We're now designing a succession planning programme focusing on the governance of risk and innovation, factors that can open up new approaches and possibilities for organisations.

For example, we know that owning

an asset increases the capacity, impact and aspiration of social enterprises and other third sector organisations. But to acquire a sustainable asset requires dropping risk-averse attitudes, and for boards to embrace financing options such as loans, share capital or social investment tax relief.

Boards need to be supported in this transition.

To make this happen, the sector needs to collaborate. We are famously good at working within the third sector, but we can also look outside, choosing private sector partners and directors wisely to help us achieve our social aims.

Third sector leaders will also need to take communities with them when they see opportunities for innovation. Change can often be slowed down or blocked in its entirety, so the leadership challenge can often be to press ahead, despite a small number of (often vocal) nay-sayers.

Leadership and governance, then, is the responsibility of all us. It's empowering but it also brings challenges that we need to act on together to ensure our boards have the tools and support they need.

David Bryan is the Social Enterprise Academy Business Development Manager for Highlands and Islands.



Our experience of working with young people is that they instinctively get social enterprise and are keen to be involved, but they need an invitation to get involved as directors

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Advertising feature



June Pennykid is passionate about her business and her family – even when they both demand attention at the same time

THE FAMILY BUSINESS THAT TAKES THE RISK OUT OF INSURANCE

June Pennykid's seven-month-old daughter is enjoying a mid-morning bottle of milk in the corner of her basement office in the centre of Edinburgh, perfectly content as her mum gets down to the business of running the 50-year-old insurance brokerage.

June is completely at ease juggling new motherhood with her role as chief executive of Keegan & Pennykid and says clients have taken brilliantly to it, barely batting an eyelid as she turns up to meetings with her very junior intern.

The baby though is here out of necessity rather than preference as the wee one came early in the middle of a whirlwind year when June and her husband John were finalising the re-purchase of the family business, which was sold in 2014.

"It's not easy, but I suspect all working parents feel the same," says June. "You do what you need to do. I'm very fortunate though to be able to bring my baby into the office, as I did with my son when he was a baby, and my husband is of course in the business, so we split the childcare between us – and the many aunts and uncles in the office! My room is like a nursery!"

Family is the most important thing in June's life. She is very close to her parents, who retired from the business they set up in 2015, and her brother. June describes moving into her father's office and taking on his role as an emotional time. Now though, having joked that the firm was the fifth member of the family when she was growing up, she laughs that it still is.

But that doesn't mean buying back the business from Benenden was an emotional decision – Keegan & Pennykid has been providing insurance broking and financial services for half a century, and that didn't happen without creating a strongly professional business above all else.

It became apparent last year, however, that Benenden was changing its strategy to focus on its personal healthcare business, so June approached the board to propose the buyout, which was completed on 2 March 2018.

"In essence, the reason I did it was because I love Keegan & Pennykid and I'm passionate about providing clients with professional independent advice and excellent service," she says. "This gives them peace of mind that their

■ **The Encompass Guide to Insurance aims to help charities identify what cover they need – www.keegan-pennykid.com/charity-insurance**

■ **Worried about cyber crime? Keegan & Pennykid has recorded several short interviews with an RSA cyber specialist. Watch at www.keegan-pennykid.com/cyber-insurance**

■ **A business continuity plan will ensure your organisation can get back up and running as quickly as possible following an incident. Use Keegan & Pennykid's free business continuity planning tool at www.keegan-pennykid.com/business-continuity**

■ **Have you considered employee benefits as a way to retain quality staff? Find out more at www.keegan-pennykid.com/financial-services/financial-services-for-business-charities**

business, charity, home or whatever is suitably protected by insurance."

Over the decades, Keegan & Pennykid has worked with literally thousands of charities. June feels that the focus on charity ties in with the personal ethos of the firm. She also understands that for a lot of charities, insurance is daunting, particularly given its (unfair she says) reputation as an industry focused on price and profit.

For Keegan & Pennykid's charity clients the important thing is to know their organisation is protected. Insurance, explains June, is not a generic commodity like gas or electricity where you shop around for the cheapest deal and get the same thing in the end. While price is incredibly important to third sector clients, and Keegan & Pennykid is always mindful of this, organisations need to know they are also adequately covered. Under-insurance for a charity could be devastating, even in some cases leading to the collapse of an organisation.

June says the firm offers charities peace of mind: "Most commonly, organisations come to us because they are unsure of exactly what insurance their organisation needs. That may be because they are a new organisation or because they have insurance in place already but are looking for advice to make sure their organisation is appropriately protected.

"Every organisation is unique

so we will ask questions in order to understand exactly what the organisation does, and we may go and visit them both to assess the risks they face and to provide advice on minimising those risks."

One area of risk Keegan & Pennykid is advising all charities to consider now is cyber security. The growth of cyber crime over the last couple of years means that this is a very real threat for all organisations big and small. Over the last few years, charities have lost thousands of pounds as a result of cyber crime.

"Cyber risks are indiscriminate, it can happen to anybody – you don't have to be a big organisation," says June. "It's very important that people are aware of what they can do to protect their organisation and insurance plays a key role in that. There are various cyber insurance products on the market – but they're not all the same. It's very important that when an organisation is looking at cyber insurance cover, they are getting the right advice."

Keegan & Pennykid is not a sales organisation – having spent 40 years working with charities, it knows that price is important but it's much more important to ensure that the third sector is armed against the growing threats and complexities of running an organisation in today's world.

"What you get from us is charity expertise, our own specialist insurance policy and access to the wider insurance market, which all allows us to obtain the most appropriate terms and price for our clients," explains June. "However, what sets us apart is our own personal service – there's no call centre, but instead a group of trusted individuals who are passionate about delivering professional advice and a tailored approach to insurance."

Spending teenage summers helping out in the family business stuffing envelopes, stamping documents and filing might have seemed boring at the time, but for June it was a formative experience. She's now committed to retaining the same personal ethos and environment that has served the firm and its clients so well for so long.

While potentially the next chief executive of Keegan & Pennykid is still more interested in her teething ring than personal risk, she certainly brings a cuteness factor to meetings – as well as providing a reassuring sign of continuity in this family affair.

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PULL OUT: THE SCOTTISH GOVERNANCE CODE FOR THE THIRD SECTOR

WHY WE NEED A SCOTTISH GOVERNANCE CODE FOR THE THIRD SECTOR

This code is for trustees of all organisations, big and small, to help ensure a thriving third sector

This Scottish Governance Code has been created for the third sector by the third sector.

It is a statement of best practice and has been developed by Scotland's Third Sector Governance Forum following consultation with over 250 individuals and organisations.

Scotland's Third Sector Governance Forum brings together individuals and organisations with knowledge and expertise in governance issues.

We are a small group of people with a big ambition to improve governance in the third sector. We have worked with people from all types of third sector organisations in Scotland to produce this code. It reflects and celebrates the wealth of good practice that exists in our sector and provides a standard for all to aspire to. Thank you to everyone who contributed – we could not have done it without you.

The Scottish Governance Code sets out the core principles and key elements of good governance for the boards of charities, voluntary organisations and social enterprises in Scotland. It is the first code to be produced specifically for Scotland's third sector, recognising the need for the sector to have its own principles of governance.

The code has been developed with reference to a broad range of other governance codes across the UK. Scotland's Third Sector Governance Forum would particularly like to acknowledge the work carried out by the authors of the England and Wales Charity Governance Code and the Northern Ireland

A Code for the Voluntary and Community Sector, and the permissions given to use both codes as an initial framework for this code.

Good governance matters because it underpins successful organisations. It matters in all sectors, but especially in ours where the purpose is to serve our beneficiaries as best we can. A good reputation takes years to build and seconds to destroy. Good governance underpins our effectiveness, and is also the best way to protect and enhance the reputation of our individual organisations and our sector as a whole.

Over 250,000 trustees in Scotland are volunteers and give their time and skills on a voluntary basis to steer the work of third sector organisations. Individually as trustees and collectively as boards, they are the bastions of good governance. This code is for them; for you.

Please use it. Please share it. Please help promote good governance.

By Pat Armstrong,
chair of Scotland's
Third Sector
Governance
Forum



Access the governance code online at governancecode.scot

THE SCOTTISH GOVERNANCE CODE FOR THE THIRD SECTOR



ORGANISATIONAL PURPOSE

A well-run board is clear about the purpose and values of the organisation and how it will achieve its aims.

As the board we have ultimate responsibility for directing the activity of our organisation and delivering its stated purpose. We will do this by:

- understanding our organisational purpose and values and committing to them to make sure that our organisation delivers what it was set up to do
- making sure our governing document is fit for purpose, and sets out the details of how our organisation is to be governed
- making and recording informed decisions in line with our governing document
- overseeing the use of assets and resources to make sure they are used to achieve our organisation's purpose and aims.
- communicating the work of the organisation and the difference it makes to the people we work with and the public



LEADERSHIP

A well-run board is clear about its role and responsibilities, and provides strategic direction in line with the organisation's purpose, vision and values.

As the board we are here to lead our organisation, and we are individually and collectively responsible for our decisions. We need to make sure our organisation has a clear strategy to achieve our purpose. We will do this by:

- identifying and embedding the vision and values of our organisation, making sure these underpin all our decisions and activities
- having a clear understanding of the individual and collective roles and responsibilities of our board
- setting the tone through our leadership, behaviour, culture and overall performance
- promoting equality and diversity throughout the organisation
- communicating with our staff, volunteers and members about our vision for the organisation and the decisions we make, and listening to feedback
- leading and overseeing progress and performance by scrutinising information on activities and achievements, and their longer-term impact
- understanding and respecting the difference between governance and operations, delegating operational tasks where appropriate, recognising that responsibility and accountability is always retained by the board



BOARD BEHAVIOUR

A well-run board, both collectively and individually, embraces and demonstrates mutual respect, integrity, openness and accountability.

As the board we understand that our behaviour can have a far-reaching impact and is fundamental to our organisation's reputation and success. We need to ensure our behaviour is consistent with our organisation's vision and values. We will do this by:

- being transparent, open and accountable about how we govern, who we are, and the decisions we make
- making sure our organisation promotes equality and diversity and embeds ethical standards in the policies, practices and culture of our organisation
- listening to each other, our beneficiaries, members, employees, volunteers and stakeholders, and respecting the role they each play
- handling concerns and complaints transparently, constructively and impartially
- recognising and acknowledging where conflicts of interest may arise
- creating a constructive board environment where diverse, and at times conflicting views are respected and welcomed, and decisions are reached collectively



CONTROL

A well-run board will develop and implement appropriate controls to direct and oversee progress and performance of the organisation

As the board we should put in place appropriate structures, controls and processes to make sure the organisation is run in line with its purposes and values, governing document, and relevant legal and regulatory requirements. We will do this by:

- maintaining and regularly reviewing policies and procedures and reporting arrangements, for example our internal governance, safeguarding, fundraising and financial controls
- making sure our scrutiny and collective decision-making processes are rigorous, informed, transparent, timely and well communicated
- understanding and analysing the internal and external operating environments of the organisation to create effective strategies and systems for risk management
- monitoring and evaluating performance against operational plans and budgets
- ensuring that any contracts are agreed and carried out in line with the interests of our organisation and in line with our values
- considering whether our organisation's legal and governance structure provides appropriate protection for the organisation, our trustees, and our members
- ensuring there are robust internal financial controls in place and clear information provided to the board to allow it to monitor the organisation's financial position
- being clear about where we delegate to staff, volunteers or committees and how we exercise oversight



EFFECTIVENESS

A well-run board understands its role, powers and duties, and works collectively and proactively to achieve its organisational purpose.

As the board we should be self-aware and work together as a team, with a diverse and appropriate balance of skills and experience to continually improve the governance of our organisation. We will do this by:

- understanding the legal structure and governing document of our organisation and making sure we act in line with it
- setting, embedding and scrutinising the strategic direction of the organisation
- regularly reviewing our performance and the composition and skills of the board
- developing and improving our capacity and capability with on-going support and training
- having a pro-active succession plan, which is linked to the strategic direction of the organisation, following any rules for how trustees are elected and how long they serve
- having a transparent and timely trustee recruitment and induction process
- making sure our meetings enable us to explore key issues and reach well-considered collective and recorded decisions that are acted on
- ensuring that meetings are well-organised, well-informed, effectively chaired and there is active participation
- communicating with those who have a legitimate interest in the work of our organisation

THE SCOTTISH GOVERNANCE CODE FOR THE THIRD SECTOR

How you can use the Scottish Governance Code



Tracey Bird

**Created by
governance geeks for
people who want to
make a difference in
Scotland**

I see myself not only as a trustee but a governance geek, interested in all the technicalities of policies and procedures and fascinated by human behaviour at board level. But I realise that I may be in the minority. You are more likely to have joined a board because you want to make a difference, because you believe in a particular cause.

But, wherever you're coming from, I'm sure we can agree that the role of a trustee is to make sure your organisation is well-governed so it can be as effective and successful as possible.

That's where Scotland's Governance Code for the Third Sector comes in. Produced by Scotland's Third Sector Governance Forum, the code will give trustees a tool to reflect on and improve governance in their own organisations.

The code has five core principles that build on what we hope is a reasonable assumption – that all trustees should understand their legal and regulatory responsibilities. These principles come under the main headings of: organisational purpose, leadership, behaviour, control, and effectiveness.

These principles apply to all organisations in the third sector, whatever their shape and size. But we recognise that what an organisation might do to demonstrate and implement each principle will differ across the sector. For example, the controls needed for a large national organisation with an income of several million pounds will not be the same as those of a small after-school club. But the principle will remain the same: "a well-run board will develop and implement appropriate controls to direct and oversee progress and performance of the organisation."

But governance isn't an end in itself, it's about continually checking you're delivering your organisational purpose as effectively as possible and understanding the needs of your beneficiaries. It's about demonstrating strategic leadership, being accountable, and behaving

with respect and integrity. It's about collectively developing and implementing appropriate controls to be as effective as possible in delivering your mission.

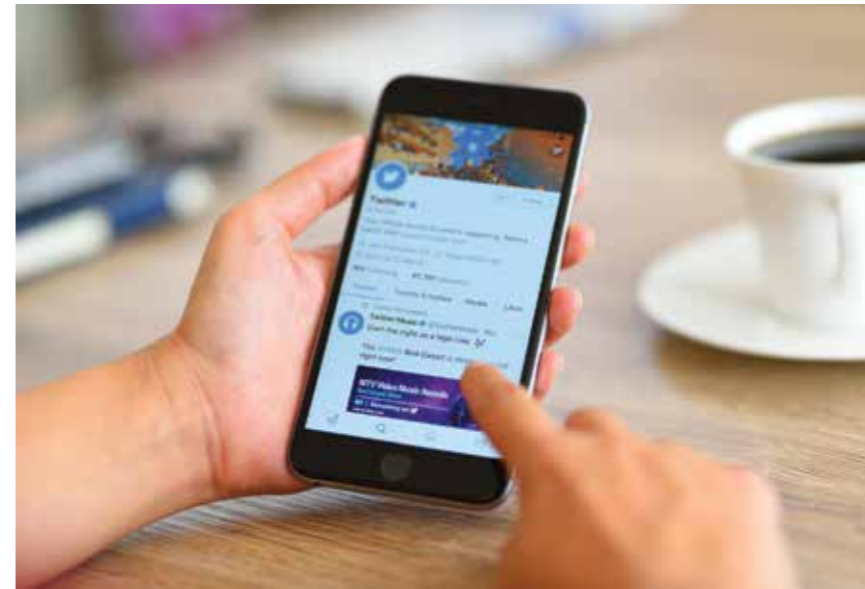
The code is deliberately short, concise and aspirational. We hope it will be used as a conversation starter, a first step on the road to good governance. We recommend that trustees reflect on what each principle means to them and their organisation, regularly revisiting the code content, and using it to support continuous improvement. Some boards may want to undertake a comprehensive external governance review, others may set up a sub-group to look at each principle in depth, and more may simply factor in time in board meetings to discuss the principles. However you start your journey, we hope you will use the code website www.governancecode.scot, which has loads of information and resources to help you get it right for your board.

Good governance is about more than just ticking the boxes and ensuring you have the right policies and procedures in place. It's also about culture, behaviour and leadership, and putting values into practice. It's about how trustees make decisions, and how well they understand their organisation and the needs of their beneficiaries. It starts with understanding why your organisation exists, its organisational purpose, and ensuring you have the right strategy to achieve your mission. Do all this effectively and your organisation will grow and flourish.

Our sector has weathered some storms over the past few years which could have been avoided with better governance. Public expectations of third sector organisations and their boards has changed, and good governance isn't an optional extra. It's essential to your organisation's effectiveness and success.

Tracey Bird is an information officer at the Scottish Council for Voluntary Organisations

Access the governance code online at governancecode.scot



Social media savvy trustees turn to Twitter for answers

#Trusteehour is approaching its first birthday, after its launch in Trustees Week 2017. It's a monthly Twitter hour featuring a different theme for discussion in each edition, and more recently, broadening its reach through collaborating with different charities to explore a range of topics for trustees.

Co-founded by Miles Weaver of Edinburgh Napier University and I, #Trusteehour forms one of several projects we're both involved in which have the goal of supporting trustees and encouraging more people to consider taking on a trustee role, particularly younger people.

Since its launch, content on the #Trusteehour Twitter account has had over 140,000 views, and it's interesting to look back and see which themes have generated the most views so far. There is a clear trend.

The two most popular themes have looked at how to do due diligence on a charity before taking on a trustee role, and how to encourage more young people to take on a trustee role.

GDPR, charity accounts, the role of

committees and how to approach a capital build project have also featured over the last year, but so far themes linked in some way to the trustee role itself have been most popular.

The other benefit of this format is that geography isn't a barrier – you can participate in, and find support from, #Trusteehour wherever suits you.

As is the case more generally with Twitter, it's entirely possible to be an observer and simply watch the conversation unfold during #Trusteehour without posting anything. For pure observers, there is still value in being aware of what others are saying. Beyond this, it's been interesting to see both regulator contributors posting, and also comments posted by new joiners.

The nature of the support on offer from this online community of practice took a new turn in September's edition, which had a focus on support for young trustees.

The Scottish Council for Voluntary Organisations and 2050 Climate Group both posted to say they were recruiting or were about to recruit for new trustee roles specifically aimed at this demographic.

Sharing resources and insight doesn't just happen during one hour each month.

To make the most of what takes place during #Trusteehour, we also publish a monthly blog summarising last month's discussion, enabling a wider audience to make use of what's been shared online.

You can read this on Miles' blog site at <https://blogs.napier.ac.uk/miles-weaver>.

Although #Trusteehour was born in Edinburgh, its reach extends beyond Scotland. Twitter posts have come from contributors in Scotland, Northern Ireland, Wales and England. A number of future collaborations are planned with organisations elsewhere in the UK, building on collaborations so far with The Yard and 2050 Climate Group, as well as the Glasgow-based #Trusteehour we held after The Gathering one evening.

If you have an idea for a theme, or the charity you're connected with would like to collaborate and co-host a future #Trusteehour, do get in touch @trusteehour.

Julie Hutchison is co-founder of #Trusteehour and a charities specialist at Standard Life Wealth.



Julie Hutchison

**#Trusteehour
provides a monthly
opportunity to
discuss issues about
being a charity
trustee**

Look out for dangers that will send charity funds spiralling down the drain

A quick glance at some of the issues making the headlines in the charity sector over the past month underline the importance of having the appropriate governance and risk management procedures in place – irrespective of the size, shape or form of your charity.

“Six fold surge in charities reporting data security incidents to the Information Commissioner’s Office in the first quarter of this year”

“The top 50 charities in the UK received 21,000 complaints last year”

“JustGiving owes £500,000 to people who have paid fees on donations – and a huge apology”

Do all of your trustees understand risk and the range of potential risks that your charity could face? Do you have appropriate controls, strategies and action plans in place to address the identified risks?

Risk can be seen as a relatively dry topic and is often looked upon as bit of a finger in the wind area, which deals with issues and events that might never happen.

However it is real and needs to be embedded in all charities. Only by fully understanding all the concerns of your senior team will you build an effective risk management process.

You only need to look at the reputational and financial damage that some charities have experienced, in some cases overnight, when issues have been brought to the fore and into the public consciousness. Risk is dynamic and its impact can be instant, and charities and their trustees have to recognise this.

Most charity board members are volunteers, but being a volunteer doesn't equate to being an amateur. Charities are in receipt of public funds, and with that they are charged with ensur-



Adrienne Airlie

Trustees need to be very mindful of reputational and financial risks



Risk is dynamic and its impact can be instant, and charities and their trustees have to recognise this

ing that not only is the money put to good use, but the structures, controls and procedures that govern how that money is used will stand up to professional scrutiny and oversight.

There are a wide range of approaches to document risk, implement controls and to facilitate effective monitoring. There is good guidance available on the Charity Commission's and OSCR's websites. If you are not used to reading this type of guidance do ask your fellow trustees and auditor to help.

Putting in place robust financial controls will also help the charity to identify and manage 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.

On the other hand, if you operate a very small charity you should adhere to the principles of having the appropriate and proportionate governance and controls in place.

You don't need to set up committees, but your trustees should be having regular meetings to review financial plans, performance against KPIs and any risks you may be facing eg, are project outcomes being delivered and evidenced? Laws and regulations followed? Complaints being dealt with and monitored – any trends? Cashflow targets being missed? It is your duty as a trustee to challenge and find the time to look objectively at what you are being told.

If you are not sure, or if what you are being told doesn't quite tally with your understanding, ask.

If you don't, then you may well find that you have the regulator, your funder(s) and/or an investigative journalist asking you the questions the morning after, and by this time it can very often be too late.

Adrienne Airlie is chief executive of Martin Aitken & Co.

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“Keep breathing and focus on what is most important”

Lucy Butters reveals her secrets of coping with being chair of the board

How did you become chair of the board?

I have been a trustee with Home-Start Glasgow South (HSGS) for five years. When our excellent former chair, Julie Culligan, stood down in August 2017 it didn't cross my mind to apply. However, after attending a training event (organised by Home-Start Scotland) and talking to fellow trustees and chairs I decided to throw my hat into the ring, I applied, and after interview I was invited to take up the position of chair.

What does being chair of the board involve?

What I want to do as chair is facilitate discussion and decision making with all the trustees to ensure that we can hear everyone's voice. We want to be inclusive and harness the experience of the board to provide support, strategic direction and good governance for the team at HSGS.

What's the hardest thing about being chair?

Without a doubt it is linked to a relationship with time. There never seems to be enough of it. Our board agendas are packed, and fly past. Each trustee needs to manage the demands of their life with their voluntary commitment to HSGS. There is always more that I'd like to do.

What drew you to volunteering as a chair with your charity?

I found out about Home-Start Glasgow



Lucy Butters, chair of Home-Start Glasgow South, was a trustee for five years before taking her current position

South when following the birth of my triplet sons, my health visitor recommended its service. HSGS works with families to enable them to cope better with what ever stresses life has thrown them. I had been diagnosed with MS during my pregnancy and was having some health issues. HSGS linked me with a volunteer who visited me for a couple of hours each week for over two years. Having experienced the service it has made me a strong advocate. I saw an advert seeking trustees and it was at a time when I had some time to contribute. I was delighted to be able to help a charity I had benefitted from.

What's the best thing about being chair?

The best thing for me is feeling far more connected to the team at HSGS. Being chair provides more challenge and responsibility, which I have been enjoying. Since 2010 I have worked for myself and while I love it, the bit I miss is being part of a team where I contribute to something which has far more impact that I could ever achieve alone.

Has your experience as a trustee, helped your career progression?

As I am my own boss and a lone worker, career progression isn't something I think about. What I have loved

about being chair though is realising the transferable skills I've developed in building my own business. The hours spent networking, building an online presence and relationship building are all useful for thinking about contributing to the success of HSGS. I am also very aware of how little I can achieve on my own, so have gone into the position of chair with my eyes wide open to the fact that it is the combined knowledge of the board that is needed to serve HSGS.

What's your top tip for maintaining a good work-life balance?

Keep breathing and focus on what is most important to you at the time. For me it is family, my business and HSGS. Life always has ups and downs, and sometimes parts of our life use more energy than usual, so it is important to know when to ask for help. I always find a walk round the park does wonders for reducing stress and increasing my productivity!

What advice would you give to a brand-new trustee?

Ask questions, listen to your fellow trustees and voice your thoughts. Remember what your charity achieves and know that your role as trustee contributes to that achievement.

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If you are running a charity, OSCR has the guidance you need.

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CLOSING THOUGHTS ON A HARD PROCESS



Beth Clarke shares what she's learned from winding up a charity

I became a trustee of a small charity just over two years ago. It had an income under £200,000 and just three staff – only one of whom was full time. Currently we're closing the charity down and transferring the work to another larger charity, and it has been an uncomfortable and difficult process.

No one becomes a trustee thinking this will happen and it's certainly been a learning curve.

It came to the point where as a board we looked at our operating model and the changing funding landscape and had to make the difficult decision.

Rather than risk getting to the point of crisis closure, it was better for beneficiaries that we began a planned handover and legacy programme which would allow the work to continue within a new home.

Following our final board meeting, we ran a session to look at what we learnt. The process of giving feedback prompted really valuable conversations. We came out saying we wished we'd done this more regularly.

My fellow trustees are graciously allowing me to share this so that others can learn from our experiences. I've taken our feedback, blended it with my experience as part of the Charities Aid Foundation advisory team, and turned it into five key lessons for trustees.

1 Issues don't surface unless people are given space and permission

When heavily focused towards tasks, board meetings can stifle energy and kill the opportunity to challenge and explore.

We could have spent more time discussing strategy and vision. It would've been better to create more subgroups or assign trustees to take on task-based items and simply report back with recommendations.

Four meetings a year is not many. In common with many charities, papers weren't always submitted in enough time to be fully reviewed and this lost

us time in meetings where ground was re-covered.

We wished we'd been more protective of our meeting agendas to hold more time to create space. Without focusing on our mission and curiously exploring alternatives, trustees were inclined to see their role as a practical one and focus on the next steps of the path we were on, rather than raise challenge.

2 Trust and connection between trustees takes time to build but is crucial

One of the highlights of being a trustee were the annual board days. This open time without a list of tasks (as important as these are) helped us bond, feel committed to the vision and keen to volunteer time. Following these, trustees felt more confident in their role and value their own ability to contribute to discussions.

After the decision to close was made, there was a lot of soul searching as to whether it could've been prevented, and we had some of the most honest conversations we'd ever had. When the funding issue became more critical, it became evident that several of us had felt unclear about the same things.

But none of us properly raised this. We felt like we were alone in thinking it. Had we asked what we thought was a silly question, we would've got to the root of some issues earlier. It's made me



realise that trustees can remain polite and respectful of others to the detriment of the organisation.

3 Have an eye on the bigger picture (ie mission)

It's difficult for boards to get the right balance on how much involvement they need in the day to day running of a charity. The smaller the staff team, the more difficult this can be. While a micro-managing chair is never a recipe for chief executive success, performance management and accountability are.

As the charity and the landscape it operated in changed, we could've done more to recognise that the skills of staff would also need to change, and proactively offer them support and training.

In hindsight, the board could've been closer to the business model, so that when we made strategic decisions, we appreciated the practical implications for staff. This would have helped us to better support staff to balance the day-to-day running with longer term mission development.

4 Maintain a professional relationship with staff

In small charities, you sometimes see trustees build personal relationships with the leadership team, particularly the chief executive. This can make navigating that personal/professional relationship challenging, particularly when

it comes to making tough decisions or providing candid, constructive feedback, which is critical for the growth of the leader and the charity. Positive relationships are fantastic, but boundaries need to be in place.

However, others, aside from the chief executive, also need an appropriate mechanism to be heard directly by the board. We wish we'd given more opportunity to volunteers and staff to give direct feedback as this would've benefited our knowledge of what was going on at ground level.

5 Momentum is enabled through clear roles and responsibilities

When the board of a charity are all volunteers and there are few staff, it feels as though there aren't enough hands to put plans into action. It can be difficult to respond quickly to opportunities and threats.

Spending time ensuring that everyone understands their role and responsibility as a trustee is a prerequisite. It's essential that each person is clear about what they bring individually.

Several trustees would've been more confident in bringing challenge or opinions had they known they were welcome. For example, those with a corporate background felt they didn't know enough about the charity sector, when in fact their knowledge and instincts were very relevant. Having regular off-

line catch ups would help with this.

To respond to change, you need to frequently revisit who on the board has responsibility for each area. If it's unclear who's doing what, then time is wasted or one person ends up doing everything.

As trustees are volunteers, it's worth considering drawing up an agreement of engagement. This will help address what happens when things aren't done and how trustees are expected to challenge constructively.

So, how well does your charity's board communicate and function? Your instinctive response may be positive, but ask yourself when was the last time a thorny issue was raised and really addressed?

Respectful disagreement is healthy when it leads to the honest airing of concerns to improve the outcomes of the charity. Without it not all ideas are heard, risks aren't fully debated and issues don't surface. Many of us dislike difficult and sensitive conversations, but for a board of trustees, it's hugely important.

I hope our experience and the lessons we learned help those of you who are trustees or board members to avoid some of the mistakes we made.

Beth Clarke is programme manager of CAF Resilience at Charities Aid Foundation.

What does brave mean to you?

According to the Oxford English Dictionary, the definition of brave is “ready to face and endure danger or pain” – crikey! The Cambridge Dictionary’s “showing no fear of dangerous or difficult things” is slightly less threatening, in my view. But why am I asking you to consider this concept of bravery?

Bravery was the theme of my firm’s recent annual third sector conference. We chose this because we are all too aware of Scotland’s active third sector with a whole army (including my dad) of trustees taking up voluntary positions on boards – but to me, taking up such a position does involve a leap of faith and is an act of bravery.

Increasingly, so much is expected of charities in terms of their governance. These expectations come from both the public and from regulators, including the Office of the Scottish Charity Regulator (OSCR).

In addition, charities have to be fully up-to-speed on general developments in law that affect all organisations eg the requirements of the General Data Protection Regulation and shifts in employment law.

Over the past year, OSCR has issued various guidance notes relating to charity trustee duties. I very much welcome guidance from the regulator, but I do have concerns in relation to references in guidance to “the charity trustees are responsible for...” What does that mean exactly?

Those within the sector who are very diligent in approaching their role as a trustee could misconstrue this as meaning that they have personal liability for whatever loss has been suffered – but this is not what the guidance is intended to mean and, indeed, OSCR is a very proportionate regulator, which wants to work with charities to achieve best governance.

By way of example, while no-one would dispute the need for charities to take safeguarding of vulnerable beneficiaries very seriously, there appears to be a potential mismatch between OSCR’s expectations and the actual legal duty (as enshrined in the Charities and Trustee Investment (Scotland) Act 2005) for charity trustees to act in the best interests of the charity.

OSCR’s interim guidance on safeguarding states that “Charity trustees must always act in the interests of the



Gillian Harkness

Taking on a role as a trustee is something to be taken seriously. Does it also require a massive leap of faith?

charity and where a charity has vulnerable beneficiaries this duty includes making sure that the appropriate safeguarding measures are put in place to prevent and protect them from harm.”

Certainly, in terms of the enshrined legal duty, charity trustees must act in the interests of the charity – but the 2005 act does not go into detail as to what this means. My concern is that some of the rhetoric represents an extrapolation from the enshrined legal principles.

It is a controversial point, but can charity trustees be acting in the best interests of the charity if they are prioritising public transparency around previous failings towards beneficiaries as opposed to quietly (and behind closed doors), putting in place measures to prevent such incidents happening in the future?

The latter approach would not tarnish the reputation of the charity, but the former is something that would seem to be important in the public interest and to aggrieved beneficiaries. Perhaps reform of the 2005 act to clarify the position, would be preferable, ie putting additional duties on a statutory footing.

In addition, the approach of extrapolating from existing legal duties could lead to all manner of best practice principles being treated as if they are legal duties, leading to a lack of clarity about what is and isn’t a legislative requirement.

Taking on a role as a charity trustee is certainly something to be taken seriously and with a sound understanding of the legal duties applying to the role, but the primary focus should be on contributing towards a charity’s key mission and overstating the position on legal duties could start to become a deterrent.

Gillian Harkness is a director in the public and third sector team at Burness Paull LLP and a member of the Charity Law Subcommittee of the Law Society of Scotland.

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FACES OF THE FUTURE

As the Year of Young People 2018 draws to a close, Sophie Bell takes a look at some of the young people who are making their mark as trustees in Scotland's third sector



Abbie Wilson

19, Vice chair for Young Scot since June 2015

Abbie is a young trustee from Livingston who is passionate about encouraging young people to be agents of change at local and national levels.

She began her journey with Young Scot as a youth commissioner on smoking prevention and has also volunteered on the Commonwealth Legacy Ambassador team and the Young Scot awards judging panel. Abbie feels that these experiences equipped her with the skills and, most importantly, the confidence to apply to study medicine.

Now in her second year studying medicine at the University of Dundee, she continues to volunteer for Young Scot.

She is looking forward to the rest of the Year of Young People and hopefully seeing more organisations appointing young people to their boards.

She says: "I think that young people are not only the future but also that they are the present so they should be involved in decision-making at every level."

Where will she be in five years' time?

"I should be a doctor! I am sure that I will still be a strong supporter of young people's rights and perhaps pursuing a career working with children and young people."

Callum Holt

22, Trustee for Scouts Scotland since November 2014

Callum has been involved in Scouting since he was six and has taken part in events across the UK, Europe, America and Asia.

He led on Scouts Scotland's social action strand of the 2014-2018 strategic plan, supporting the creation of the UK Scouting campaign A Million Hands. As part of the campaign, Callum helped to establish strategic links with charity partners to support Scouts in the UK and overseas to take action on four issues chosen by young people – mental health, access to clean water and sanitation, disability and dementia. Now, more than 50% of Scouts in Scotland record taking part in youth social action projects on a regular basis.

Outside of Scouting, Callum works for Who Cares? Scotland on the 1,000 Voices project, helping to support care-experienced young people have their voice at the heart of the Independent Care Review.

He said: "I'm a trustee because young people should be at all levels of any youth organisation to help shape and guide it. Scouting gave me the opportunity to thrive and help become who I am, and I want to make sure that every young person, regardless of who they are, gets the same opportunities that I did and still do."

Where will he be in five years' time?

"I still want to be able to call myself a young person, but unfortunately that won't be possible! I want to be doing something that gives me a challenge but still makes me smile. Hopefully I'll finally have my own place (mum and dad if you're reading this I will move out soon, I promise!)"



Lipa Hussain

23, Trustee for YWCA, The Young Women's Movement since November 2017

Lipa Hussain is a proud resident of Edinburgh which is, in her opinion, the best city in the world. Although

her ancestral background goes back to Bangladesh she was born and brought up in Scotland.

Lipa currently works in the third sector but looks forward to exploring as much as she can in her professional life.

She was aware of YWCA's work through its blog and spotted a board trustee advertisement on its website. She says she has particularly loved meeting all the amazing people at YWCA and being part of the decision making for the organisation.

"I wanted to be a trustee because someone who looks like me doesn't often get a seat at the table," says Lipa.

Lipa is also a big fan of tea with a few biscuits and has a preference for action/spy thriller movies – she says in another life she would've been a spy but that it's safer to stick to making tea for now.

Where will she be in five years' time?

"I would have like to say I travelled to new countries, learnt a language or two and taken part in causes that will ultimately leave a positive legacy for myself."

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Stuart Rankin

24, Trustee for Boys' Brigade since February 2015

Stuart has been a member of the Boys' Brigade since 1999, spending the whole time at the 15th Coatbridge Company in his hometown where he's worked towards earning the Queen's Badge and the Duke of Edinburgh's (DofE) Silver Award.

He also completed the 2010/11 King George VI leadership course, which exists to train young people in becom-

ing leaders in the Boys' Brigade. After that, Stuart has joined committees at local and regional levels before becoming a national trustee.

Within the BB, he works with the older age group and organises the local Young Leaders' Network for those aged from 16-26.

In addition, Stuart remains involved with the DofE Award as an expedition assessor, and running the award within the company he is employed with.

Outside the BB, Stuart gained a BEng (Hons) in Electronic and Electrical Engineering at the University of

Strathclyde and is currently pursuing a career in retail management.

He got involved at board level because of his loyalty to the Boys' Brigade, saying: "I am a trustee because I want to help shape the future of an organisation that has given me so much."

Where will he be in five years' time?

"I'd like to have used my experience within the BB and as a trustee to have advanced in my professional life, while allowing the next generation of young people to have the opportunities I have been lucky enough to have."

Drew McGowan

25, Trustee for Ypeople since February 2017

Drew, a policy officer at West College Scotland, is passionate about making a difference. As well as giving his time to YPeople, he volunteers as a young carers mentor with Volunteer Glasgow.

"I believe that volunteering my time is a chance to learn and grow as an individual as well as an opportunity

to use my skills to help others," says Drew. "The average age of a trustee is 61 and it is estimated that only 2% of charities have young people on their boards - that needs to change.

"Young people bring new skills, a fresh insight and a different perspective that charities can tap in to and more need to do just that."

Where will he be in five years' time?

"I would like to be continuing to work in policy and public affairs in the public or third sectors, serving as a trustee in a values-driven charity and volunteering my time to causes that I am passionate about."



Emmie Main

20, Trustee for Youth Scotland since November 2016

Emmie is a third year community education student at the University of Edinburgh and a part-time youth work practitioner and volunteer.

She has been involved in voluntary youth work since high school and now delivers sessional youth work with young people aged eight to 25 across the Lothians.

On top of this, Emmie is also a Young Scot volunteer - helping to deliver the 2018 Year of Young People - and a newly elected committee member with the Community Learning and Development Standards Council.

"I became a trustee because I knew first-hand the difference undertaking a youth award made to me.

"I wanted to help Youth Scotland reach out to and engage with more young people and encourage them to do an award or take part in the other opportunities that Youth Scotland offer.

"I also wanted a better understanding of charity governance."

Where will she be in five years' time?

"I hope to be working in the field of community education in a full time capacity and still involved in charity governance, whether it be Youth Scotland or any of the other wonderful third sector agencies there are in Edinburgh and the Lothians."



Ryan Kemp

25, Trustee for Feeling Strong since June 2018

Ryan is a trustee of youth-led charity Feeling Strong, a Dundee-based organisation which aims to empower young people who have experienced mental health challenges.

He balances this role with his fourth-year psychology studies at the Abertay University and volunteering as a group facilitator for a mental health recovery course. Ryan says both of these activities have helped him develop skills that are proving

useful to Feeling Strong.

As if that's not enough, Ryan is also involved in student representation - currently as a student member of the Learning and Teaching Committee.

"Feeling Strong has a philosophy: designed by young people, delivered by young people, for young people," explains Ryan. "We want to actively benefit the lives of young people, and as the saying goes, be the change you want to see in the world."

Where will he be in five years' time?

"I see myself working in clinical psychology as an assistant psychologist having completed an MSc after finishing my undergraduate degree." ▶



Keiran O'Neill

20, Trustee for Scottish Youth Parliament since June 2018, as well as the National Theatre of Scotland

Keiran is from Possilpark in the north of Glasgow and has been a member of the Scottish Youth Parliament for that area since just after enrolling at the Royal Conservatoire of Scotland in 2015.

He really enjoyed his role as an MSYP and got more involved in youth work and advocacy as a result. After two years at university, Keiran decided it wasn't for him and instead got a job working for a politician. Since then, he has become even more involved with the Scottish Youth Parliament and was elected as an SYP trustee in June 2018.

The SYP board is a bit like a cabinet, where the chair assigns portfolios – Keiran was given policy and advocacy. He says he loves this brief and the team of people he gets to work with to deliver real change for young people living in Scotland.

His inspiration for becoming a trustee stems back to his teen years: “My youth worker, Donald MacLeod – who sadly passed away earlier this year – always told me that youth work changes lives. That’s why I am a trustee.”

Where will he be in five years' time?

“I would still like to keep working with fantastic organisations like SYP in one way or another and, while doing my day job, still be able to do the voluntary stuff that really gives me so much joy.”



Usman Ali

26, Trustee for Housing Options Scotland since May 2016

Usman has an impressive CV for one so young, having worked in various political, public and third sector settings.

A Glaswegian from Thornliebank, he graduated from the Strathclyde School of Government and Public Policy and was elected in 2014 as chair of the Scottish Trade Union Congress Youth Committee – the first Scottish Muslim or Asian to have been so.

Usman was also appointed as a Commonwealth Youth Lead and as a Fellow of the Royal Commonwealth Society. To top all that, in June 2017, Usman was appointed a Queen's

Young Leader by Her Majesty the Queen at Buckingham Palace.

Explaining why he volunteers with Housing Options, Usman says: “Housing is one of the big issues of our time.

“Scotland requires better quality and more affordable housing. The most disadvantaged in our society need Housing Options Scotland to ensure they get all the information and support to make the right decision for them and their families.”

Where will he be in five years' time?

“I want the country and world to be in a better position than today because we have looked after and empowered those most disadvantaged to identify and fulfil their goals regardless of the situation they face.” pursuing a career working with children and young people.”

How to find young trustees for your charity

Scotland's Year of Young People (YOYP) has catalysed our public, private and third sectors to consider and include young people in decision making throughout 2018. But, it would be easy for this inclusion to fall off once we move into 2019 and beyond.

If there is one legacy from the Year of the Young People, it would be great if it is to see more young people on charity boards.

2050 Climate Group is a youth-led charity which seeks to engage, educate and empower Scotland's young people to take action on climate change. We have 15 board members, over 40 operational volunteers, paid interns and one member of staff, all of whom are young people: everyone in our organisation is aged between 18 and 35 years.

For our charity, young trustees are essential: we explicitly work to empower young people to take leadership roles, so the composition of our board is both a demonstration of our ethos and impact, as well as the future we want to see.

For the individual, there are also many benefits: I became a trustee at the age of 25, and being a young person and a trustee gives me the opportunity to advocate for an organisation I'm extremely passionate about. It also enables me to develop strategic planning and partnership skills, compounding how effective I can be in my day job, which is also in the third sector, and as a member of society.

So, for charities considering taking on young trustees, here are some top tips from our experiences of recruiting young people as trustees at 2050 Climate Group.

Firstly, acknowledge there may be skillshare on both sides.

Ambition and enthusiasm are key competencies in themselves, but every organisation should be ensuring their governance structure has the sufficient skills and training to perform their role well (regardless of their age).

Consider the other skills young people might be able to share (eg on community engagement and development, on security and information management, on digital engagement,



It is important to create easier conditions for young people to participate in board meetings



Catriona Patterson

If there is one legacy from the YOYP, it would be great if it was to see more young people on charity boards

on representation) and value their contributions.

It's also important to create easier conditions for participation.

Sometimes early-career professionals do not have the flexibility of schedule that retired or professionally established trustees have. Consider changing the time of your board meetings, providing letters of support to trustees' workplaces, and support their attendance at meetings through reimbursing travel or childcare expenses.

Finally, it's a good idea to look in new places for recruitment.

It takes a leap of faith for someone to apply for their first trustee position, and they may not be aware of typical job-boards. Consider using the networks of your staff, youth organisations and young professional networks to reach out to not-the-usual suspects.

Being a trustee as a young person is incredibly rewarding, personally and professionally in ways I think neither I nor my organisation initially anticipated. For the third sector to truly be working to achieve inclusive and lasting change, we all need to create and support opportunities for young people on charity boards.

Catriona Patterson is a board member of the 2050 Climate Group.

Creating a digitally confident third sector



David McNeill

SCVO has been working hard with senior third sector leaders to support digital development

Two years have passed since we created a digital call to action for Scotland's third sector. The Call to Action to Create a Digitally Confident Third Sector in Scotland aimed to encourage those within the sector to explore, adapt, invest and collaborate to create a more digitally confident third sector in Scotland.



New technology and the internet continue to transform the way we live, work and learn

And now our follow-up Call to Action, which looks to build on the progress that has been made in helping organisations to become more confident digitally, has been published.

Over the past two years, the Scottish Council for Voluntary Organisations (SCVO) has been working with senior leaders from over 80 third sector organisations across Scotland to face up to the challenges that the sector faces in embracing digital technology.

In the follow-up to the Call to Action, we review progress, provide practical examples of how organisations are adapting and evolving in our digital world. We also explore what's changed in the past two years and ask whether we are keeping up with the pace of change.

New technology and the internet continue to transform the way we live, work and learn. Since the launch of the Call to Action, new themes have emerged as important considerations for third sector organisations.

The Cambridge Analytica scandal, the growth of fake news and conversations around the impact of screen time on mental health highlight that organisations must take the time to understand the potential harms of the internet on the people and communities they serve. The growth of cyber crime also makes it crucial for organisations to better manage the risks of operating in a digital world.

The report examines whether a digitally confident third sector is being created in Scotland, and has gathered stories from those who have embraced digital leadership.

For example, Emma Whitelock, chief executive of Lead Scotland, highlighted the importance of having a clear digital plan.

She said: "We now have a succinct digital plan and we are phasing in changes, with features at every team meeting to talk about progress. Within our plan we are continually improving by inviting feedback and running small tests."

Meanwhile Rory Gaffney, head of operations for Downs Syndrome Scotland, said that an internal cultural shift towards digital has boosted his organisation.

He said: "We have changed our approach to how we do things. We have made a move to be more agile. Now with a culture of ask forgiveness not seek permission, staff are better able to test approaches and try new things out."

Our report displays the progress that has been made, but also highlights a need to pay more attention to cybercrime and calls for a better understanding of how individuals and communities are being affected by the use of personal data and disruptive technology.

The report highlights six tough questions for third sector organisations to ask themselves, related to leadership, culture, service design, cyber resilience, being data driven and using flexible technology.

There is also a strong call for third sector organisations to continue to explore the implications of operating in a digital world, adapt, be willing to invest in change and to share skills, resources and technology.

The full Call to Action can be found at <https://scvo.org.uk/digital/evolution/creating-a-digitally-confident-third-sector-in-scotland-what-next/>

David McNeill is digital director at the Scottish Council for Voluntary Organisations.

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The countdown is on: VAT is going digital



**Sean
McGinness**

**VAT is going digital –
what does this mean
for your charity?**

HM Revenue & Customs' (HMRC) new digital filing and record keeping rules come into force on 1 April 2019. There has been surprisingly little direct communication to charities affected by the changes – nevertheless, preparations for making VAT digital (MVD) continue.

The final legislation has been published, alongside HMRC's guidance confirming many of the practical details of MVD, and information intended to help taxpayers prepare for the change.

Is my software compatible?

HMRC maintains a list of software providers who have demonstrated their software product can file a return using the new process.

Our advice for charities already using accounting software is to talk to your current provider first: the switch to MVD is likely to be most straightforward for those charities that do not need to make software changes, and the fact that your provider is not on the current list does not mean that they will not have a solution in place

for next April.

Charities that keep their records on Excel are not currently using software (or are at a point when they might consider a change in package for other reasons) might find the HMRC list a useful starting point – although bear in mind that more suppliers are expected to be added over the coming months, as they complete the required HMRC testing. The point to note is that most providers are only making new versions of software MVD compliant. Therefore, if a charity is using an old version of software or an unsupported version it will need to take some action to be compliant from 1 April 2019.

If an agent prepares, submits or reviews VAT returns, it should be ensured that the agent's process will be compliant come 1 April 2019. At Saffery Champness, we are working with a range of charities to find the right MVD solution for each client: some are looking to completely outsource their record-keeping and VAT return preparation, while others need help identifying a solution which will allow them to create the required digital links between their multiple existing backend systems and an MVD-compliant submission package.

I use a spreadsheet – what do I need to do?

HMRC does accept that VAT records can be maintained in spreadsheet. If

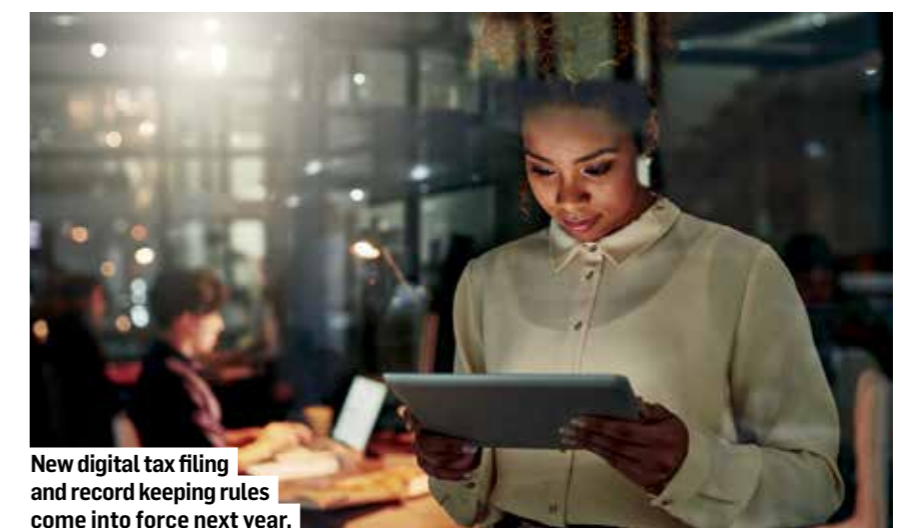
charities consider that they do not wish to move to an accounting package (there are some very good, and easy to use options available) then they can continue to use a spreadsheet. The spreadsheet will need to be API-enabled to be able to file the VAT return to HMRC. If this is option is being considered, it is recommended that spreadsheets are reviewed to ensure that they are compliant – as an example, cutting and pasting of data does not meet the new requirements.

VAT groups will also need to use this method to consolidate figures from multiple entities.

Penalties

With the new reporting regime will come a new look for both late filing and late payment penalties (although there will be no change to the current payment deadlines). The government's intention is that the new penalty rules will ultimately replace those for the majority of taxes with a regular reporting requirement (but not event-triggered taxes such as stamp duty land tax). The starting point for the new regime, however, will be VAT, where the new rules will replace the existing penalty structure (including the often punitive default surcharge regime).

Sean McGinness is VAT director at Saffery Champness LLP.



**New digital tax filing
and record keeping rules
come into force next year.**

How to ensure your event runs like clockwork

Alex Thomson provides some top tips on running a third sector event

Last year, Forbes Magazine listed events management as one of its top 10 most stressful jobs – behind the military, police, pilots and firefighters.

When organising events, it is inevitable that something will not go to plan. This could be the venue flooding, a key speaker pulling out at the last minute, the carpet for your event being stuck in France or a red weather warning meaning you need to cancel the event. I suppose for all of this to have happened to me over the past 20 years is not too bad!

Managing and running a successful event, no matter how large or small, can be challenging. But there are simple things you can do to help deal with any challenges and hopefully prevent sleepless nights.

All too often when events fail, aren't well attended or run at a loss, it's because they are not thought through properly and there's not a valid reason to organise an event. Don't decide to have an event based on someone else's successful model. Ensure you are clear on why you're having your event and what you want to achieve from it.

Know your budget, and don't forget to revisit it throughout the planning process. Budgeting for an event is tricky, especially at the early stages: uncertainty about sponsorship or delegate income, hidden costs and late demands from speakers can all lead to increased costs. There is no point guessing how much the total increase could be – you need to go through every line in your budget and try to estimate how much



Alex is pictured here at SCVO's annual Gathering event, with former communities secretary Angela Constance and SCVO convener Andrew Burns



Don't decide to have an event based on someone else's successful model – ensure you are clear on why you're having it

each item may rise by and why.

Pulling together a timeline, checklists, logistics, staffing and processes can be time consuming but spending time on these key elements is vital. And eventually crossing them off your list can be extremely satisfying!

Choosing the right venue in the right

location is no easy task. Visit a few venues and run through your plans with their staff. Don't be afraid to ask what they could add to enhance your event, such as free parking, upgraded accommodation or a welcome drink.

Content is key, it's what the event is all about and needs to be in line with what you want to achieve. Having a celebrity or well-known speaker doesn't equal a good audience turnout and timings are crucial.

Never underestimate the amount of lead time you'll need to promote to your event. Your branding, theme and key messages need to work seamlessly and capture the aim of your whole event.

On the day be prepared, keep calm and have contingency plans in place.

The best way to take the stress out of an event is of course to let the Scottish Council for Voluntary Organisations (SCVO) do it for you! Why not join us at the Gathering 2019? Organised every year by SCVO, the Gathering is the largest free third sector event in the UK, a place for all the amazing people working in the sector to network, showcase what they do and learn from each other. Find out more at scvo.org.uk/the-gathering2019.

Alex Thomson is events and training manager at SCVO.

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Which is 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 we have 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 our bank account comparison table below.

Key

-  **Free online and day-to-day banking services**
-  **Access to high street branch network**
-  **Minimum deposit required**
-  **Dual authorisation**

Co-operative Bank

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

FREE



Community Directplus

- Free online and day-to-day banking services when in credit
- Access to high street branch network and at Post Office branches
- Account management online, by phone or by post

Key features: Can apply for project funding for up to £1,000 from the Customer Donation Fund.

Unity Trust Bank

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



Unity Current Account

- Account management online or by phone
- Online banking with single, dual or triple authorisation
- Minimum deposit required – £500
- Access to high street branch network – NatWest and Royal Bank of Scotland

Key features: Fees from £6 per month. No debit card available on any current account.



Charities Aid Foundation Bank



Owned and operated by a charity, CAF Bank provides tailor-made financial products and services for the voluntary sector. Any profits made are reinvested into the charity sector.



FREE



CAF Cash Account

- Free online and day-to-day banking services
- Access to high street branch network – HSBC and Royal Bank of Scotland
- Minimum deposit required – £1,000
- Account management online, by phone or by post
- Online banking with dual authorisation

Key features: £5 monthly fee. 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.

Lloyds Bank

Treasurers' Account (for not-for-profit organisations with a turnover below £50,000)



- Free online and day-to-day banking services when in credit
- Access to high street branch network
- Account management online or by phone
- Online banking with dual authorisation

FREE



Key features: Ongoing support and guidance. Free presentation cheques to use when making a large donation or awarding a major prize. No minimum deposit required.

Reliance Bank

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Charities, Club & Society Current Account (for charities with a turnover below £500,000)

- Free online and day-to-day banking services when in credit
- Access to high street branch network – Lloyds, HSBC, Barclays or Bank of Scotland
- Account management online with dual authorisation



FREE



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.

Santander



Treasurer's Current Account (for not-for-profit organisations with an annual turnover of up to £250,000)

FREE



- Free online and day-to-day banking services
- Access to high street branch network
- Account management online and by phone

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.

Bank of Scotland



Treasurer's Account (for not-for-profit organisations with a turnover below £50,000)

- Free online and day-to-day banking services when in credit
- Access to high street branch network
- Account management online or by phone

FREE



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.

Clydesdale Bank



Business Choice Charities Account (only available to registered charities)

- Access to high street branch network

FREE



Key features: No transactional fees levied if account turnover under £1m. Credit interest linked to the base rate; unlimited withdrawals and deposits; relationship manager.

Triodos Bank



Works specifically with organisations that bring about positive social, environmental and cultural change.



Triodos Charity Current Account

- Account management online, by phone or by post
- Online banking with a choice of level of authorisation
- Access to high street branch network – NatWest and Royal Bank of Scotland

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. Must have an expected turnover of more than £5,000.

Royal Bank of Scotland



Community Account (for clubs, charities, societies or other not-for-profit organisations with a turnover below £100,000)

FREE



- Free online and day-to-day banking services
- Access to high street branch network
- Account management online and by phone

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