

Move On Organisational Review

February 2007

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Executive Summary

Move On is a well managed organisation with a competent and committed Board of Directors, and excellent staff and volunteers. Its work is highly regarded by funders, partners, beneficiaries and volunteers. It has a unique approach to working with young people affected by homelessness, not only providing support and opportunities, but doing so in a way which empowers and challenges. It has a positive influence not only on users of its services but on its volunteers and the wider population of young people. Much of this is due to its very committed and highly competent staff.

Now in its tenth year, Move On is at a stage where it needs to review its options for the future whilst at the same time considering how best any expansion or consolidation should be managed and supported.

Move On faces several immediate challenges. Competition for funding is putting the organisation under financial pressure and making it difficult to retain and reward key staff; office accommodation is becoming very pressurised, especially in Edinburgh, and office systems require renewal or upgrading. Any expansion plans will have to take account of these factors and their likely impact on Move On's structure and finances.

Move On has had considerable success in attracting funding and, in some cases, repeat funding, thanks largely to the efforts of the Executive Director and the Management Team. However, it urgently needs to improve the level of unrestricted income in order to increase its level of reserves and provide a sound foundation for the development of its services.

Some attempts to generate other unrestricted income are being made through the development and promotion of training packs. However, further methods of generating income need to be considered. A new funding strategy should help to address this issue.

Move On's credibility is high amongst users of its services and groups with which it networks. It is, however, not widely known elsewhere, and it needs to develop proactive PR and marketing strategies to help raise its profile. A key element of such strategies will be the re-development of Move On's website. This will provide the opportunity to highlight the organisation's services and activities and attract donations. The website should also aim to attract potential users of services through being interactive and user-friendly.

Immediate challenges for Move On are to determine its strategy for the immediate and longer-term future; find suitable alternative office accommodation; develop PR, marketing and funding strategies and to upgrade its infrastructure.

Acknowledgements

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1.0 Background

Move On approached Charities Aid Foundation (CAF) for support in developing a fundraising strategy through:

- The evaluation of existing systems and developing a plan for the future
- Training a staff member to follow up and implement the strategy

CAF agreed to provide support to the organisation through its consultancy grant programme. The purpose of the consultancy was to undertake a HealthCheck, followed by support in developing a business plan and a funding strategy. In addition CAF agreed to provide Move On with a cash grant of £890 towards the cost of an Open University training course in fundraising.

The HealthCheck involved a review of the current situation of the organisation and recommendations for the future. Areas covered by the review included the organisation's work; governance and management arrangements; planning, support and operating systems; financial management and tax effectiveness; fundraising and income generation, communications, public relations and marketing.

CAF appointed Moira Laws to undertake the consultancy. The consultant undertook several visits to the organisation and held one-to-one interviews with a wide range of staff and Directors. She also had informal discussions with volunteers involved as peer mentors in the Housing Education Service. She was invited to attend two Board meetings, a meeting of the Senior Management Team, an all-staff Team Meeting and a Directors/Staff Away day. She was also invited to attend a meeting of the sub group set up by the Board to take forward the Business Planning process. A list of those interviewed by the consultant appears in Appendix 2.

2.0 Mission, vision and objectives

Vision

Move On currently has no specific Vision Statement. This, together with the existing Mission Statement, is being reviewed as part of the Business Planning process (see Section 9) in a consultation process involving Directors and staff.

Mission Statement

Move On's current Mission Statement is 'to work with people affected by homelessness, enabling a positive future.' The mission statement is underpinned by the following values:

- Respect Treating service users with respect and respecting their rights to make their own decisions.
- Enabling Enabling service users to achieve things for themselves.
- Inclusiveness Offering services and an environment where users feel accepted and included.
- Challenging Challenging themselves and service users; challenging exclusion.
- Quality Providing a high standard in all activities for service users, staff, volunteers, funders and supporters.

Mission and Strategic aims

The overall aim of Move On is to provide an accessible service enabling people affected by homelessness to tackle their homelessness effectively and permanently and in the process regain more control over their lives.

Objectives

Since the organisation was set up in 1997, the principle objectives have expanded to include a range of service including community-based intensive support, group work including personal development and pre-vocational training, peer education, guidance , advice and information.

The organisation is aware that external factors such as developments in government policy, social trends and competition for funding have a direct impact on the organisation's work. Aims and objectives are now being reviewed as part of the business planning process.

Strategy

In February 2006 the Board agreed strategic priorities for 1, 3 & 5 years, and progress against these priorities is monitored regularly. Responsibility for implementation lies with the Executive Director and the Management Team.

The development of a formal business plan as part of the consultancy process will involve a review of how the organisation's aims and objectives are to be achieved and the resources required.

Culture

The organisation is split between two offices 50 miles apart – one in Edinburgh and one in Glasgow. Each city has historically developed its own distinct culture, and this is reflected

in the organisation's own culture. Different funding mechanisms also influence the work in the two cities. Although the organisation was originally set up in Edinburgh, the Glasgow office is now the larger base.

Some of the staff in each office work largely in the community and use the office only as a base. Some work part-time or are sessional workers, making it difficult to arrange team or all-staff meetings.

The organisation has worked hard to overcome these difficulties. The Executive Director divides his time between the two offices, and Board and Senior Management Team meetings are held alternately between the two bases. Directors are drawn from both geographical areas, and the Edinburgh Manager has a member of staff based in the Glasgow office. The Office Manager, based in Glasgow, travels to Edinburgh to supervise H & S, petty cash etc.

All Staff get together twice a year for a full team meeting, and there is an annual Directors/Staff Away Day.

Relationships between members of the Senior Management Team appear to be very good. The Office Manager plays a key role in linking the two offices and is universally regarded as 'the glue' which holds the organisation together. Nonetheless, a distinctly different culture exists between the two offices. This may be partially due to differences in the size of office accommodation, gender balance and employee numbers as well as different styles of management and different activities. Move On needs to address the issue of communication and integration, particularly if services are expanded not only within the two major cities but elsewhere in Scotland. An intranet and improved telephony would be helpful in this respect (see section 5).

In general, staff appear to feel well supported by the Executive Director and their Managers. Staff are very loyal to the organisation, despite many of them being on short-term contracts. There is a history of the organisation looking after its own, with volunteers moving on to take up paid posts and staff being promoted within the organisation.

Relationships between members of the Board of Directors and the staff appear on the whole to be good. There is prompt feedback from Board meetings to the Senior Management Team and through them, to individual members of staff. The Chair is highly regarded, very involved with the organisation, and supportive of the Executive Director and Managers. The Treasurer is well known in the Glasgow office and liaises closely with the Executive Director and Office Manager. However, other Board members are not so well known by staff. Some Directors have full-time work commitments, making it difficult for them to allocate time to activities outwith Board meetings, and the two most recently elected Board members have not had a great deal of opportunity to integrate with staff.

The Directors/Staff Away Day in February and the planning of a large conference to take place in the autumn of 2007 should provide opportunities for Board members to be more fully involved with the organisation and develop closer relationships with staff.

Recommendations

- Develop Vision and Mission statements.
- Develop Business Plan.

- Continue to develop two-way communication between Directors and staff.
- Improve communication between offices via an intranet and improved telephony.

3.0 The work of the organisation

The work of the organisation can be broken down as follows:

- Community-based intensive support
- Group work including personal development and pre-vocational training
- Peer education
- Guidance
- Advice and information

Move On's work is divided as follows:

Glasgow

Floating Support Service

This provides community-based support for people affected by homelessness, struggling to manage in the community. Support needs are high and focus on issues such as addiction, physical and mental health; histories of abuse and neglect; low self esteem.

Training and Development Service

This service focuses on personal and skills development, supporting people into employment, training, education and volunteering. It includes an adult literacy and numeracy service and computing skills training. An aftercare service provides on-going support.

Money & Debt Advice service

This service is provided in conjunction with other partners and is aimed at reducing financial exclusion and enabling people to access mainstream financial services.

Housing Education

A pilot based on the Edinburgh model (see below)

Edinburgh

Housing Education Service

This service engages with young people in residential care who are potentially vulnerable to homelessness. Young people are brought together with young volunteers who have themselves been homeless and who are trained by Move On staff to deliver the workshops. Workshops are also run in Fife, Perthshire and the Lothians, and a successful pilot is just entering its second year in Glasgow.

Housing Education – Mainstream Schools

This project expands on the work of the core housing education service by delivering information workshops on independent living to senior students in mainstream schools in Edinburgh and the Lothians.

Housing Education – Commercial Development

This is a one-year pilot programme aimed at income generation by developing the core programme workshops into a commercial package which can be used by other agencies and councils nationally.

Mentoring Programme

This programme provides training for volunteer mentors who then go on to provide support for young people leaving care and entering independent living. Volunteers use social, cultural and leisure opportunities to support the young person's development and improve their confidence, thereby removing their dependency on paid workers.

Outcomes

The success of these programmes is evidenced through feedback from attendees at the workshops and those on the training and development programmes. The schools workshops are particularly successful, bringing together school students with trained volunteers who have actual experience of homelessness.

The volunteers themselves develop as a result of the training they receive and the transferable skills they acquire through developing and delivering the workshops. Several have gone into further education, employment or wider volunteering as a result of the experience they have gained. Indeed, one of the problems for the organisers of the programme is the large turnover of volunteers on the peer education programme.

On the volunteer mentoring programme, some volunteers have gained employment with Move On. The impact of the mentoring programme on volunteers in paid employment does not seem to have been assessed, and this is an area which could be developed. Contacts should be made with local employers to discuss the benefits of employer supported volunteering and discuss various options for supporting Move On.

The training and development service works with approximately 40 service users per year, of whom about 50% move on to further training, volunteering and/or employment. There is a waiting list for applications to the programme, with referrals not only from agencies but from users themselves. The key benefits of the programme are that it is user-led and flexible, with a follow-on support service for those who need it. One of the past service users has successfully studied for an HNC qualification and is now a Move On employee.

The floating support service works with up to 25 people at any one time, offering person-centred and flexible support based on the needs of individual service users. While the main focus is to support people to maintain their homes in the community, the great majority of service users go on to develop their social networks, access and sustain a range of positive activities, and begin to address the underlying causes which contributed towards their becoming homeless.

Partnership working

As part of its Training and Development service, Move On works in partnership with other agencies such as housing associations and the Glasgow Simon Community to deliver a money and debt advice programme and literacy and numeracy programmes.

It also has links with Columba 1400, a community and international leadership centre in Skye. which focuses on releasing the potential of young people with a background of challenging experiences.

Given the competition for funding and the economic benefits of joint bids and collaboration, Move On would be well advised to expand its development of partnership links. It should develop a wider knowledge of what its competitors offer and identify where

there is scope for collaboration and where Move On's uniqueness lies.

Network links

Move On's work is becoming well recognised, and staff have been invited to speak about their work at external conferences and workshops. Move On has been asked to sit on the planning group for the National Throughcare and Aftercare Conference, and one of the volunteers has recently joined the Forum as a Board member.

Move On should continue to develop such external links and capitalise on this as part of its PR strategy. (See Section 8)

Quality standards

As a result of the success of the Housing Education programme, Move On is considering having the programme accredited, and has started discussions with the appropriate academic institutions.

Move On has previously considered applying for the Investors in People award but the process was felt to be too bureaucratic and of doubtful benefit for the organisation. Move On could benefit from considering the use of the PQASSO¹ system which would be less onerous and which is increasingly well regarded by funders of voluntary organisations who see it as providing evidence of the quality of their governance and management.

Move On's Floating Support Service is subject to annual Care Commission inspection to assess whether the service meets National Care Standards for Housing Support Services. The two inspections carried out to date have been very positive, emphasising the high quality of the service provided for individuals with complex needs.

Relationship with other organisations

Move On has good relations with its main funders, and managers work hard at developing these through the production of regular reports. The Office Manager is developing a good rapport with Trusts, being proactive in contacting them and providing them with progress reports. This has led in some instances to repeat tranches of funding being made.

Move On has had contact with the local Business Gateway and understands that it will shortly have access to free support for marketing and website development.

It also has good rapport with local CVS networks and with social economy organisations from which it sources services such as electrical appliance testing and office furniture.

Recommendations

- Continue to develop relationships with trusts, local funders, partners and external networks.
- Explore possibilities for further alliances and partnership working.
- Develop and exploit links with employers through Employer Supported Volunteering.
- Develop wider knowledge of competitors' services.

¹ PQASSO: Practical Quality Assurance System for Small Organisations. Developed by Charities Evaluation Service

- Identify Move On's uniqueness.
- Investigate PQASSO quality assurance system.

4.0 Governance and Management

Governance

Move On is a registered charity and a company limited by guarantee. There is a Board of Directors consisting of Chair, Treasurer and four other Directors, with the Executive Director acting as Company Secretary.

The Board meets monthly, with formal agenda, minutes and relevant papers circulated in advance of each meeting. Minutes are recorded in detail and action points are assiduously followed up. The Executive Director provides comprehensive financial reports and a fundraising report for each meeting. Managers submit monthly progress reports and are invited to attend from time to time to expand on specific developments. Each Manager submits a fully comprehensive annual report to the Board.

Board meetings appear to be mostly well attended, although there are times when some of the members who have full-time business commitments find it difficult to attend. Three Directors, including the Chair, have a long association with Move On. The Board has for some time been aware of the need to expand its numbers, and an active recruitment process took place before the AGM in November 2005. Positions were advertised and candidates interviewed. As a result, two new Directors were appointed, each with specific skills and knowledge and drawn from different geographical areas.

Both the Chair and one of the other Directors have, in the immediate past, had periods of absence for legitimate domestic reasons - factors which have left the Board temporarily under-strength. The Chair is therefore keen to continue recruiting new members; this will not only expand the Board's skills base, but will allow for succession-planning. There is a need for individuals with commercial expertise, particularly PR and marketing experience. A conflict of interest policy should be drawn up to safeguard integrity of decision-making.

New Directors are provided with induction via the Chair and the Executive Director. The Chair intends to carry out appraisals with each Director during the current year to assess performance and identify any development needs. The consultant circulated a needs analysis questionnaire to all members of the Board at the start of the consultancy, and the outcomes from these will help to inform the process. From the two questionnaires returned, the gaps appear to be principally in legal areas. The consultant's understanding is that gaps in these specific areas are filled by other Board members. In terms of how well the Board is perceived to work as a team, the gaps appeared to lie in attendance at meetings and communication with staff. A copy of the questionnaire appears in Appendix 3.

There are currently no sub committees, but short-term sub committees are set up for specific purposes, such as the Business Planning exercise. Directors also work with staff on projects such as the planning of conferences.

The Board is actively looking at ways of extending user involvement within Move On, and is discussing the possibility of user representation on the Board. Users of services are regularly involved in the recruitment process for new staff.

Management

Day to day management is the responsibility of the Executive Director, assisted by a Depute and Office Manager based in Glasgow and a Manager in Edinburgh. The Executive Director divides his time between the two offices. The Management Team, consisting of the Executive Director, two Managers and the Office Manager, meets monthly, with meetings recorded and action points followed up. In addition, each local team meets with its Manager on a fairly regular basis.

The Office Manager handles day-to-day finance, recruitment, IT, and health & safety issues in both offices. Her hours have been extended recently to take on fundraising work in conjunction with the Executive Director.

The Management Team appears to be very stretched and works under a lot of pressure, with very little administrative support. Managers are at times doing administrative tasks which are inappropriate for their skills level. The organisation should be aware of the additional pressures which any expansion of services will put on the Management Team.

Employees

In addition to the Management Team there are in the region of 18 employees, of whom 10 are full-time. There has been a relatively high turnover of staff, due principally to the short term nature of funding, but also resulting from the demands of the job and nature of the client base.

Employment documentation

The Office Manager is responsible for personnel documentation, and personal files for each employee, which are very efficiently maintained and stored confidentially. Employees have access to their personal files on request.

Contracts of employment and comprehensive job descriptions are in place for all staff. Notice periods, both to and from employees, should be included in the employment contracts.

There is a very comprehensive Staff Handbook which is currently being revised and will be circulated to staff for consultation before being approved by the Board. It contains a useful organisational chart. It is recommended that amendments should be made to the clauses referring to Maternity Leave and Pay to bring them into line with the impending regulations². Parallel changes should be made to Paternity and Adoption arrangements. There should be greater clarity regarding Parental Leave, Time off for Dependants and Flexible Working. Move On should also be aware of impending legislation regarding leave for Carers.

Disciplinary and grievance procedures are included as Appendices to the Staff Handbook. These should be checked to ensure compliance with the new Dispute Resolution Procedures. Although the Handbook makes reference to separate equal opportunities and health and safety policies, it is recommended that comprehensive Equal Opportunities and Health and Safety policies be developed and brought within the Handbook as Appendices. In addition, specific policies on Redundancy, IT use and protocols, and Flexible Working should be developed and references made to them in the Handbook.

² April 2007

A formal induction process and a support and supervision system are in place. Annual appraisals have recently been introduced for managers and will be extended to all staff during 2007. Appraisals will not be linked to pay.

Health and safety

The organisation shows a high level of awareness of Health and Safety issues, and this is emphasised by the Board of Directors. All new staff receive training as part of the induction process. The Glasgow office is well supplied with alarm systems. There is a set procedure for lone working and staff are provided with mobile phones and personal alarms as part of the Staff Safety policy. Staff were recently circulated with a questionnaire to assess their awareness of Move On's personal safety procedures, and action is being taken to address any gaps.

All staff and volunteers working with vulnerable clients are subject to Disclosure Scotland checks.

The Office Manager undertakes risk assessments, including fire risk assessments, at both offices. Space at the Edinburgh office is very tight, and when all staff and/or volunteers are in the building the accommodation is greatly overstretched. There is a shortage of storage space for equipment and potential for accidents. There is no lift in the building, and with offices on the 2nd Floor, this makes access difficult for anyone with mobility problems, although a meeting room can be hired on the ground floor. Staff and volunteers have to transport heavy and awkward equipment when they carry out visits, and this provides additional health and safety issues. External space has to be hired for volunteer meetings and training sessions.

The Board of Directors is monitoring the situation closely and strenuous efforts are being made to find either additional space in the same building or alternative city centre accommodation. However, it is proving difficult to find suitable city centre accommodation, and moving to the suburbs is not an option as the user groups are principally located in the city centre. This could be an opportunity for Move On to take a fresh look at its accommodation needs and consider alternative options such as greater use of home working.

Salaries, benefits and staff development

Salaries are normally reviewed annually, with pay rises in line with inflation and subject to the financial position of the organisation. There is a broad salary banding process in place. A further salary review exercise would be beneficial, to allow comparison with similar organisations.

The Board of Directors is currently considering the feasibility of introducing a pension scheme, to which employer and employee would contribute. Employees may currently make their own contributions to a stakeholder scheme.

The Board of Directors is very conscious of the stressful conditions under which employees may at times have to work due to the nature of the client group. There is a generous Sick leave scheme together with a Benefit Day scheme whereby employees may take time off at short notice in special circumstances.

The organisation shows a high level of commitment to staff training and development, for

which the Depute Director is responsible across the organisation. Training needs are discussed during Induction and during regular Support and Supervision sessions. Several staff are undertaking SVQ Level 3 training and the Depute Director is undergoing Assessor training. The Executive Director has recently successfully completed an intensive accredited course of leadership and the Office Manager has started an Open University course in Fundraising following graduation with a business degree.

The Depute Director and Edinburgh Office Manager would each benefit from a detailed skills needs analysis to identify appropriate training in specific areas of management.

Volunteers

Move On has in the region of 23 active volunteers engaged in the schools programmes and 16 in the mentoring programme. There is a formal induction process for volunteers. All undergo a specific training programme, lasting between 7 and 12 weeks, and thereafter they receive one-to-one supervision.

Volunteers are clearly valued within Move On. Peer educators feed into evaluation and monitoring meetings with funders, and there are suggestions books in which they can write down suggestions and ideas for developing the service. Volunteer meetings are held on a regular basis and all receive support and encouragement to progress in their own lives.

Volunteers speak very highly of the Move On staff. The consultant received such comments as: 'They open doors for you'; 'Not a bad word to say about staff or the workshops'; (Staff are) 'dynamic – a driving force'; 'you get a positive buzz from being here.'

A group of volunteers was recently successful in winning the Thrifty Squid Challenge, aimed at reducing financial exclusion among young people and sponsored by Barclays and the FSA.

Constraints of space make it difficult for all volunteers to meet together and this should be taken into account when Move On is looking for alternative office space.

At the moment there are no volunteers engaged elsewhere within Move On, such as with administration, publicity or marketing. Move On should seek to expand its volunteer resource or provide training for existing volunteers to develop skills in other areas. Some contacts for accessing volunteers are attached in Appendix 4.

Recommendations

Governance

- Actively consider succession planning.
- Widen knowledge-base of committee members to include commercial/ marketing/pr expertise.
- Draw up and introduce a Conflict of Interest policy.
- Progress user involvement. Move On currently has a service user involvement policy which is actively being put into practice.

Management

- Re-assess management structure and administrative support.
- Undertake assessment of specific management skills requirements of Depute Director and Edinburgh Manager.
- Expand job descriptions to include person specifications.
- Review employment documentation in line with new regulations.
- Expand employment policies and procedures.

Health and Safety.

- Urgently locate alternative office accommodation in Edinburgh.

Salaries

- Undertake an independent salary review

Staff Development

- Undertake assessment of specific management skills requirements of Depute Director and Edinburgh Manager.

Volunteers

- Expand or develop volunteer resource to include support with internal administration, publicity and marketing.

5.0 Planning, support and operating systems

Strategic and Business Planning

The Board of Directors sets an overall direction and this is cascaded down to team by individual managers. A business plan was developed in 2002 but appears not to have been actively used. In February 2006 the Board identified key priorities for current and future years, and progress against these has been regularly monitored at Board meetings. These priorities are now being reviewed as part of the new business planning process.

A description of how the consultant assisted the organisation with the business planning process follows in Section 9.0

Operational planning

Individual Service Managers produce annual plans and agree goals and targets with the Executive Director. Progress is monitored at Management Team Meetings and at individual Support and Supervision sessions.

Working environment

The Glasgow office has a reasonably good working environment with adequate office space. The interior has been freshly painted by staff and volunteers. However, as noted earlier under Health & Safety, the working environment in the Edinburgh office is very cramped. Toilet facilities in both offices are adequate for staff but are inadequate when service users or volunteers are in the offices as well as staff. Both offices require additional storage space, and Edinburgh staff have to hire external meeting and training rooms.

ICT

Computers are of varying ages and capabilities, generally being acquired as part of project funding. There are additional laptop computers in the Glasgow office which staff may use when they are not required for the Literacy work with service users. The Glasgow office has a broadband connection but the Edinburgh office is on dial-up via one computer. None of the computers is networked.

It is recommended that funding should be ring-fenced to upgrade computers and to link offices by means of an intranet. This will improve staff communication, sharing of data and organisational templates and proforma. Refurbished computers may be available through the local social enterprise network.

All staff have individual passwords, and antivirus software and firewalls are installed on all systems. Confidential information, such as that relating to personnel and finance, is password protected and access restricted to appropriate senior staff. The Office Manager does weekly IT backups using memory sticks which are stored in metal containers.

The Move On website is currently disconnected pending its updating. This is discussed further in Section 8.

Telephones in the Edinburgh office are inadequate for the amount of staff and volunteer usage and for holding confidential conversations. This is exacerbated by the shortage of office space. Any re-location or office expansion plans should take account of the need for improved telephony. A virtual private network linking both offices, and, if necessary home workers, could be readily introduced and would greatly improve communication.

Recommendations

- Plan for phased replacement of computers.
- Connect Edinburgh office to broadband.
- Connect staff in both offices through an intranet.
- Include improved telephony in any office expansion plans, including a virtual private network.

6.0 Financial management and tax effectiveness

Financial policies

The Board of Directors exerts very tight control over the financial position of Move On and monitors finances closely at each Board meeting. The organisation is working towards having free reserves to cover six months' expenditure.

Budgeting

The Executive Director is responsible for preparing a draft budget in consultation with the Office Manager and Treasurer. The final budget is set by the Board. Budgets are set in detail for each cost centre.

Monitoring and managing expenditure

The Board of Directors receives detailed computerised monthly management accounts produced by the Executive Director. Income and expenditure for each cost centre is monitored against budget figures and the Executive Director provides a written explanation of areas of any variances. Each Manager is responsible for expenditure in his/her own area. Where there is overspend, processes for reducing expenditure are outlined. The Office Manager is responsible for day-to-day management of accounts and the Treasurer and Executive Director monitor accounts between Board meetings.

The Executive Director produces a fundraising report for each Board meeting. This lays out clearly how each cost centre is funded, what the current balance is, what bids are pending, and explanations for variances. It identifies clearly where there are problems and what risks are likely to arise if targets are not met.

Financial control

Day to day recoding of all financial transactions, the payment of all accounts, banking of cash, payroll arrangements, monthly reconciliations and day to day management of account are the responsibility of the Office Manager. Cheques require two signatures, those above £500 requiring Directors' signatures. The Office Manager monitors petty cash arrangements in both offices.

Financial reporting

Accounts are prepared and audited professionally in line with SORP requirements.

Tax effective giving

To date there appear to only be only relatively small amounts of personal donations to Move On. These make use of Gift Aid. The organisation does not appear to have investigated the opportunities for increasing donations by means of legacies and payroll, and these are areas which could be explored.

Recommendations

- Explore wider opportunities for tax effective donations, legacies and payroll giving.

7.0 Funding, resourcing and income generation

Funding base

Move On receives major financial support from the Scottish Executive, Glasgow Community Planning Partnership, Glasgow City Council, Glasgow Community Planning Partnership, Glasgow Community Learning Strategy Partnership, Glasgow Housing Association, the City of Edinburgh Council, Scottish Enterprise, Communities Scotland, various charitable trusts, and donations from members of the public.

The Executive Director is largely responsible for drawing up major funding applications, supported by Managers in Glasgow and Edinburgh who have each developed close working links with their individual local authorities and other statutory agencies. The Office Manager has now taken on responsibility for drawing up funding proposals to trusts, and in a period of 11 months has succeeded in attracting almost £30,000 of trust funding. She has developed good communications with individual trusts and is working hard to consolidate this element of fundraising.

Donations

Move On receives donations from individual members of the public and from schools. There appears to be little done to promote opportunities for donating to the organisation by means of legacies or payroll giving, or for the development of a membership or 'friends' system. This is discussed in more depth in section 8.0.

Trading activities

In 2006 Move On acquired short term funding from Communities Scotland to develop its Housing Education, Mentoring Services, games and workshops as commercial packages to be offered to local councils and other agencies. This commercial activity is a new approach by Move On to diversify its funding base, improve the level of unrestricted income and promote its products.

There appears to have been some difficulty amongst Move On staff in marrying the concept of a commercial activity with a voluntary sector ethos. The work is at an early stage but has achieved some success. Progress against targets should be monitored closely as this activity is likely to require further investment in time and resources to reach a point where it becomes financially viable. There is potential for such services to be marketed via the internet and thereby to extend the customer base beyond the immediate geographical area at relatively low cost. Depending on the success of this activity it may be necessary eventually for Move On to consider setting up a separate trading company.

An overall marketing strategy should be developed and this is discussed in the next section.

Recommendations

- Increase donations through promotion of legacies and payroll giving.
- Develop donors' database.
- Consider developing a membership or 'friends' system.
- Assess viability of trading activities against pre-set targets.
- Develop a marketing strategy.

8.0 Communications and marketing

Legal requirements

The organisation complies with its legal obligation to produce annual accounts which incorporate a Director's report providing an overview of the organisation's activities during the year.

PR

Move On is becoming increasingly recognised as a leader in Scotland in the involvement and effective participation of young people. Move On has developed links with the media, and has had good coverage on the radio and in the press of various events involving its volunteers such as the Thrifty Squid competition. However, such contact seems to have been reactive, and much more needs to be done to develop a more proactive, integrated approach. A comprehensive PR strategy would help in this respect. Move On notes that their work is becoming increasingly recognised, including their work in enabling homeless people of all ages to move closer to employment, as well as their work with young people.

Marketing

Move On has started to develop a brand image in terms of its publications and reports. The brand needs to be consistently applied so that the concept of Move On is emphasised at every opportunity.

Move On's last Annual Review is dated 2003. This is a well produced document, providing information about the organisation in a very clear, succinct format, using well presented graphics and diagrams. It is recommended that a document of this style and quality be produced each year for distribution to funders, partners, potential donors, and to support applications to trusts.

Move On has a website, but this does not appear to have been actively managed or kept up-to-date. Because of the negative image it projects of the organisation it has recently been closed down pending redesign. Funding for its redevelopment has been sourced and the site will be redesigned in consultation with staff and users.

The significance of a well-developed, interactive and easily navigable website does not appear to have been actively considered by Move On up to now. It could provide an enormous opportunity for raising the organisation's profile, attracting potential users, volunteers and funders. It could also be used as a recruitment tool for both staff and volunteers, and to attract donations. It could provide the most up-to-date information on Move On's events and achievements and could also be used to distribute newsletters to a database of community and business contacts.

Move On does not appear to have developed any publications relating to its commercial products. A brochure or catalogue would be helpful in this respect, and a separate page on the website could provide the opportunity for internet sales.

Move On needs to consider the resourcing implications for the development of its PR and Marketing activities. It is essential that an overall marketing strategy is developed to underpin its fundraising activity. There will be resource implications for PR and marketing work, including managing the website.

Competitors

There is a need for greater awareness of what competitors are offering and charging, particularly in relation to commercial products. Move On needs to identify what is unique about its services and products and how they differ from the competition in order to be able to promote them effectively to potential funders, users and customers.

Sponsors

Move On has no corporate sponsors, and this is an area which could usefully be developed. Local employers could be asked to sponsor equipment, publicity material, programmes, exhibitions, conferences and fundraising events.

Recommendations

- Develop integrated marketing and PR strategies and allocate necessary resources.
- Consider production of an illustrated annual report.
- Actively manage re-vamped website.
- Undertake a comparison of competitors.
- Identify what is unique about Move On's services and products
- Introduce electronic newsletters for distribution to a database of community and business contacts.

9.0 Work toward Development of Business Plan and Funding Strategy

The consultant had discussions with the Executive Director to determine the appropriate approach to developing a business plan, and a proposed plan structure and suggested process for taking the project forward were submitted to the Board. It was proposed that the Board review the work they had already done early in 2006 on organisational aims and integrate this into the new plan, as well as considering the need to develop a new Vision and Mission Statement. The Board agreed to set up a Board sub-committee to take the business planning process forward.

The Board wished to involve Move On staff in the business planning process. The first stage was for the consultant to introduce the subject of business planning to the staff at their all-staff meeting in December 2006. The staff undertook a SWOT analysis and priority exercise for the next 12 month, 3year and 5 year periods. This was then compared with a similar exercise which the Board had undertaken previously.

The next stage was for staff and Directors to get together in February 2007 to attempt to finalise Vision and Mission Statements and agree organisational aims.

10.0 Conclusions

Move On is a well managed organisation with a very competent Board of Directors and skilled staff. Since its foundation ten years ago it has expanded its activities and now has well- established bases in Scotland's two principal cities

It is a supportive, caring employer and engenders a great sense of loyalty among its staff. Its employment policies are well drawn-up and staff training is well embedded. There is evidence of sound financial reporting and monitoring. Budgets are well drawn up and adhered to.

There is a broad fundraising base and good relationships with funders. Short-term funding for project activity is an on-going issue and has a bearing on staff retention. The additional resources being put into fundraising and developing relationships with trusts are bearing fruit, and should result in a more secure financial base for both project work and central support. Further ways of increasing unrestricted income should be sought through promotion of opportunities for sponsorship, donations and payroll giving.

Move On achieves a high standard of service to its users and has had considerable success in changing the lives of young people whose background is often chaotic. The key to this lies in its individual, supportive approach to young people, not only by staff but by young people who have first hand personal experience of homelessness. Move On adopts a similar individualised person-centred approach in its other services, engaging those aged over 18. This consistent approach ensures that these high standards are replicated elsewhere in Move On's service delivery.

Expansion of activities has led to office space, particularly in Edinburgh, becoming overstretched, and it urgently needs to find alternative accommodation to support its activities. Health and safety issues, including access, are becoming a pressing issue. More up-to-date computing and telephone systems would improve efficiency and communication between offices.

There is a shortage of administrative support which impedes management effectiveness. The Management Team is under a lot of pressure, and this will increase as the organisation develops unless a suitable infrastructure is put in place. Suitable management training should be sourced to support existing and planned activity.

The Board of Directors has a reasonable breadth of knowledge and experience, but would benefit from expanding their numbers to include more individuals from a commercial background, particularly those with PR and marketing expertise.

Although Move On has a very good reputation among its users and volunteers, it is still relatively little known. PR and marketing strategies are urgently needed to raise its profile and underpin a wider funding strategy.

11.0 Summary of recommendations (in order of priority)

(to be finalised once Business Planning and Funding Strategy elements are complete)

1. Urgently locate alternative office accommodation in Edinburgh.
2. Review employment documentation in line with new regulations and expand policies and procedures.
3. Draw up Board conflict of interest policy.
4. Continue to develop relationships with trusts, local funders, partners and external networks.
5. Develop PR and marketing strategies and allocate necessary resources.
6. Undertake a comparison of competitors.
7. Identify what is unique about Move On's services and products.
8. Assess viability of trading activities against pre-set targets.
9. Actively manage redeveloped website.
10. Undertake assessment of specific management skills requirements of Depute Director and Edinburgh Manager.
11. Undertake an independent salary review.
12. Consider production of an illustrated annual report.
13. Explore wider opportunities for tax effective donations, legacies and payroll giving.
14. Develop donors' database.
15. Connect Edinburgh office to broadband.
16. Plan for phased replacement of computers.
17. Improve communication between offices via an intranet.
18. Expand or develop volunteer resource to include support with internal administration, publicity and marketing.
19. Widen knowledge-base of Board to include commercial/ marketing/PR expertise.
20. Actively consider Board succession planning.
21. Investigate PQASSO quality assurance system.
22. Continue to develop two-way communication between Directors and staff.
23. Develop and exploit links with employers through Employer Supported Volunteering.
24. Introduce electronic newsletters.
25. Consider developing a membership or 'friends' system.
26. Include improved telephony in any office expansion plans, including a virtual private network.
27. Progress user involvement .

Appendix 1 Next Steps

(to be revised when Section 9 is completed)

Immediate

1. Locate alternative accommodation for Edinburgh office.
2. Update/expand employment documentation.
3. Draw up Board conflict of interest policy
4. Develop funding, marketing and PR strategies
5. Finalise Business Plan
6. Connect Edinburgh office to broadband
7. Update and promote Move On website.
8. Undertake skills assessment of managers and implement appropriate training.

Longer-term

7. Recruit additional Board members
8. Develop and expand partnerships
9. Expand volunteer resource.
10. Investigate PQASSO.
11. Upgrade computers and link offices via an intranet.

Appendix 2

Persons interviewed

Board of Directors

Hilary Patrick	Chair
Robert Patterson	Treasurer
Peter Strong	
Keith Robinson	

Senior Management Team

John Hinton	Executive Director (based in Edinburgh and Glasgow)
Jim Burns	Depute Director (based in Glasgow)
Biddy Donald	Housing Education Team Manager (based in Edinburgh)
Brenda McChlery	Office Manager (based in Glasgow)

Staff – Glasgow office

Grace Craigon	Housing Education Development Worker
Pat Donnelly	Training and Development Worker
Louisa Duguid	Housing Education Sessional Worker (formerly Administrative Assistant)
Hugh McRoberts	Floating Support Service Senior Project Worker
Steph McFadden	Aftercare Worker

Staff – Edinburgh

Joanna Marshall	Housing Education Development Worker
Lorena Rivadulla	Housing Education Development Worker
Jill Fenton	Schools Programme Development Worker
Vivian Thomson	Mentoring Service Development Worker

Volunteers - Edinburgh

6 volunteers from schools programme team

Appendix 3

Questionnaire for Board Members

Confidential

The purpose of this questionnaire is to find out (a) how well Board members are handling their individual roles, (b) how well the whole team is working together and (c) what further support might be helpful.

A. Individual assessment

Please rate your current ability to handle the subjects below, using the following scoring:

- 1 = I have limited and knowledge and understanding of the subject.
- 2 = I have developed some knowledge and understanding of the subject since becoming a Board member.
- 3 = I feel reasonably confident about the subject, but would benefit from updating/getting more experience
- 4 = I am confident I understand the topic and could explain it to a new Board member with no knowledge of the topic.

Subject	Rating (<i>self assessment</i>)
1. Finance budgets – drawing up budgets – monitoring management accounts – reading and understanding annual reports – reading and understanding..... funders – familiarity with funding processes.....	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
2. Management Supporting and supervising Director/Chief Executive Interviewing applicants for Director-level or Board level vacancies..... Handling appeals resulting from employee disciplinary or grievance issues..... Making decisions about property or leases..... Strategic planning and monitoring..... Business plan development	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

<p>3. Legal Knowledge</p> <p>Charity Law <input type="checkbox"/></p> <p>..... <input type="checkbox"/></p> <p>Employment Law <input type="checkbox"/></p> <p>Board-level responsibility for Health & Safety, including Risk Assessments/Fire regulations..... <input type="checkbox"/></p>	
<p>4. Information Technology</p> <p>Able to use computer to write letters/reports <input type="checkbox"/></p> <p>Able to use spreadsheets <input type="checkbox"/></p> <p>Able to use email <input type="checkbox"/></p>	
<p>5. Homelessness</p> <p>level of knowledge, understanding and/or experience of the subject <input type="checkbox"/></p>	
<p>6. Presentation skills, eg making a case to a funder <input type="checkbox"/></p>	

B. Team assessment

Please rate your assessment of how well the Board **as a team** performs in the areas listed below, using a scoring of 0 (lowest) to 4 (highest).

Subject	Rating
1. Dealing with financial issues	<input type="checkbox"/>
2. Handling correspondence	<input type="checkbox"/>
3. Forward planning	<input type="checkbox"/>
4. Making decisions	<input type="checkbox"/>
5. Solving problems	<input type="checkbox"/>
6. Handling differences of opinion within the team	<input type="checkbox"/>
7. Attending Board meetings	<input type="checkbox"/>
8. Communicating with staff	<input type="checkbox"/>

C. Further support

Please use the box below to add any further comments and to indicate how you and members of the Board might benefit from further support. This could be anything from finding additional Board members, learning more about a particular responsibility you have, or undertaking specific training.

Thank you for your help in completing this questionnaire. All replies will be treated in strictest confidence. Please send your completed questionnaire to Moira Laws, CAF consultant, at the following email address: lawsm@futurefocusscotland.co.uk by 13 November 2006.

Appendix 4 References

HR advice and information

- (i) ACAS: www.acas.org.uk
Helpline: 08457 47 47 47
Publications: 08702 42 90 90
- (ii) Department of Trade and Industry : www.dti.gov.uk
Publications Orderline: tel: 0870 1502 500. E.mail: publications@dti.gsi.gov.uk
- (iii) www.directgov.uk (formerly www.tiger.gov.uk Tailored Interactive Guidance on Employment Rights).
- (iv) Learndirect Scotland Tel: 08456 000 111. Produce free publications called "Directors' Briefings," covering many HR topics.

Funding information

- (v) Edinburgh Voluntary Organisations' Council (EVOG)
14 Ashley Place, Edinburgh, EH6 5PK Tel: 0131-555-9100
- (vi) Glasgow Council for the Voluntary Sector (GCVS), 11 Queen's Crescent, Glasgow, G4 9AS Tel: 0141-332-2444

Training

- (vii) Learndirect Scotland Tel: 08456 000 111

ICT

- (viii) Charity Technology Trust – charity set up to make charities more efficient by promoting better use of technology.
3rd Floor, Downstream Building 1, London Bridge, SE1 9BG www.ctt.org. Tel. 0845-456-1823.

Volunteers

- (ix) REACH (Retired Executives Action Clearing House), 15 West Maitland Street, Edinburgh, EH12 5AE. Tel: 0131-336-1080
- (x) Volunteer Centre Edinburgh, 45 Queensferry Street Lane, EH2 4PF Tel: 0131-225-0630
- (xi) Volunteer Centre Glasgow, 84 Miller Street, G2 8BL Tel: 0141-226-3431
Millenium Volunteers in Scotland, Volunteer Development Scotland, Stirling Enterprise Park, Stirling, FL7 7RP Tel: (01786) 479593
- (xii) Volunteer Centre Network scotland. www.volunteerscotland.org.uk

Quality Systems

- (xiii) Charities Evaluation Service, 4 Coldbath Square, London, EC1R 5HL. Tel: 020-7713-5722
www.ces-vol.org.uk

Social Enterprises

- (xiv) Senscot, 54 Manor Place, Edinburgh, EH3 7EH Tel: 0131-220-4104