

# Strategic Plan

2004-2009

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## 1 INTRODUCTION AND BACKGROUND TO PLAN

The purpose of this strategic plan is to ensure that RVA has a framework for future development that will ensure the very best of services to the local voluntary sector. This strategy will help to ensure that the direction of RVA's growth and development will support and enable all of our members to have the ability to make decisions about how they develop and operate and to influence the shape of the voluntary sector in the future.

To achieve these objectives the strategic plan sets out how RVA will move forward over the next five years in:

- *Developing Core Services to the Voluntary and Community Sector* – where we aim to build the capacity of member organisations to be independent and effective service providers.
- *Developing Partnerships and Influence* – where we aim to be engaged in many of the key partnerships in Reading and to enable our members to also engage effectively in partnership working
- *Marketing and Communication* – where we set out our aims on developing our marketing and communication to support the services we provide
- *Developing Staff and the Board of Trustees* – where we aim to ensure that all staff, volunteers and Trustees have the opportunity to develop their knowledge, skills and understanding of the sector they serve
- *Premises for RVA* – where we aim to ensure that RVA operates from a secure environment which meets the needs of the organisation and its members
- *Funding and Fundraising* – where we aim to have adequate funding that meets RVA's core expenditure needs and reflects the strategic development of the organisation.
- *Information, Communications and Technology* – where we aim to ensure that our information services are effective, efficient and meet our members needs and that the IT infrastructure continues to develop in line with the development of RVA

The Strategic Plan has been developed by the Board of Trustees and the Staff over the past year and contains the condensed wisdom of many individuals accumulated over many years of voluntary sector service. The process has included facilitated workshops, brainstorming sessions, discussion and many hours of deliberation with a small steering group encouraging and overseeing the process. It was agreed for publication by The Board of Trustees at a board meeting on 19<sup>th</sup> April 2004.

As a framework for development It is aimed to be useful to our member organisations and our funders and will provide the basis for the planning of RVA's annual work programme where it will be reviewed annually to ensure that it continues to meet the needs of the organisation and reflects any necessary changes both internally and externally.

## **2 STRATEGIC VISION STATEMENT**

READING VOLUNTARY ACTION aims to be:

- 2.1 Recognised and trusted as a community development agency of the highest quality.
- 2.2 An agency that empowers and strengthens the voluntary and community sector throughout Reading.
- 2.3 An influential and respected partner with voluntary, private and statutory organisations.
- 2.4 Working from secure and inspirational premises.

### 3 VALUES OF RVA

- 3.1 **Voluntary Action** - RVA believes that voluntary action makes a vital contribution to the health and democracy of our society by offering every individual the opportunity to make a positive contribution to that society and to their own community.
- 3.2 **Quality Services** - RVA believes that the provision of services which meet the needs of the service user is paramount and that the ability of local voluntary and community organisations to respond sensitively to user need is one of their greatest assets.
- 3.3 **Equality** - RVA believes that all people have a right to be included in the power structures and processes which affect their lives and supports organisations which promote the exercise of these rights. It also believes in equality of access to all public services and seeks to exemplify this in its own service provision.
- 3.4 **Democracy** - RVA supports organisations which seek to manage their affairs in a democratic, open and accessible way.
- 3.5 **Independence** - RVA is an independent organisation which supports other organisations in their right to independence of thought and action in pursuit of their aims.
- 3.6 **Partnership** - RVA believes in sharing knowledge and resources to provide better services and promotes collaborative work across organisational and sectoral boundaries.
- 3.7 **Confidentiality** - RVA approaches all work with service users and partner agencies with a respect for confidentiality.
- 3.8 **Valuing People** - RVA believes that people are the greatest asset in any voluntary or community organisation and that volunteers, employees and committee members must be supported in their personal growth and learning.

## **4 THE EXTERNAL ENVIRONMENT AND THE CLIMATE IN WHICH RVA OPERATES**

### **4.1 Nationally**

There can be little doubt that the role of the voluntary and community sector in meeting the needs of citizens has a higher profile now than at any time since the 2<sup>nd</sup> World War. There is recognition where once there was ignorance, there are open doors where once they were closed and there are funds where once there were none. Consider the considerable sums of money that have flowed into the sector through the Community Fund, Single Regeneration Budget, Children's Fund, Community Empowerment Fund, SureStart, etc, etc.

Although the current Labour Government have played a significant role in elevating the importance of the sector there is more to this trend than party politics. What politicians have come to realise across all parties is that voluntary and community organisations can do some things better and more efficiently than local government and unwieldy statutory bureaucracies. Notions such as "social capital" and "community cohesion" which have great currency in political circles describe territory which is very familiar to our sector.

It is therefore a time of considerable opportunity for many voluntary groups – by no means a bed of roses but clearly better than it was. However, with opportunities come threats: mission drift as a result of chasing money; loss of independence as organisations become sub-contracted agents of the state; neglect of the campaigning role lest it offends our paymasters, etc. Such issues are quite rightly debated at length in the "trade" press and RVA would be wise to remain familiar with them.

### **4.2 The Treasury Cross Cutting Review**

This review of "The Role of the Voluntary and Community Sector in Service Delivery" published in September 2002 opens with the following statement: "This Government is passionately committed to the work of the voluntary sector. We believe that voluntary and community sector organisations have a crucial role to play in the reform of public services and reinvigoration of civic life. We in government can not do this on our own" There can be little doubt that this review with its 43 recommendations has done, and will do, much to influence the external environment in which RVA seeks to implement its strategy over the next 5 years. Some of the key reasons for this are:

- The fact that the Review originated from the most powerful department in government
- It is backed by an injection of £220 million to strengthen the sector
- The main focus of the review is on the **local** voluntary sector
- It introduces key principles such as “full cost recovery” in the funding of voluntary organisations
- There is a fundamental emphasis on building the capacity of the sector through infrastructure support organisations such as Councils for Voluntary Service (the generic name for an RVA type organisation).

### **4.3 Regionally**

The impact of the move towards regional and sub regional governance and administration is significant for RVA`s operational environment although not always clear when looking into the future. It would seem unlikely that the people of the South East region will embrace the opportunity of a Regional Elected Assembly. The Government Office for the South East (GOSE), on the other hand, is likely to remain an agency that is of significance to the local voluntary sector and must be understood by RVA. It may well have a key role in the implementation of the Cross Cutting Review. RVA`s experience of GOSE to date is that it is supportive of the sector`s role. At the Berkshire level the Learning and Skills Council (LSC) is an important agency. As the period covered by our strategic plan commences so too does a training development post funded by the LSC and hosted by RVA. This must be seen as an opportunity to build our relationship with the LSC and develop mutual understanding.

### **4.4 Locally**

Reading has a dynamic and creative voluntary and community sector which has both a need for and a respect for RVA`s services. RVA`s role is well understood by many organisations. Whilst such a platform is a good base from which to launch into the next 5 years it must never be taken for granted. There is always room for improvement and there are always organisations we have failed to reach. Furthermore, RVA`s profile with the general public is low, although the Voluntary Action Centre`s matching up service may give us greater recognition in the longer term.

RVA has grown considerably in the last few years and may continue to grow. We will do well to remember that the more resources we attract the more we will also attract scrutiny of our performance – and rightly so. There is a degree of scepticism in the public perception of charities with

issues such as duplication, fraud and over inflated administrative costs being typical concerns.

In terms of local statutory agencies the key organisations in our daily operations are Reading Borough Council (RBC) and Reading Primary Care Trust (PCT). RVA has a good relationship with both organisations, working in partnership with them at many different levels. There is mutual trust and a maturity to the relationship which can stand sharp disagreements whilst remaining friendly. Again, there is no room for complacency here.

The Borough Council has a long track record of support for the sector. This is unlikely to change although as a local authority it will continue to experience the tensions that arise between the different roles of community leader, service provider and enabler. The extent to which the authority will be able to “let go” in its enabling role will be a matter of some significance to RVA. The Primary Care Trust is a young organisation and is on a steep learning curve with regard to the voluntary sector.

#### **4.5 Partnership**

This is a powerful concept that has embedded itself into thinking about local service provision, along with its attendant notions of “joined up” planning, “whole system” thinking etc. At a fundamental level this emphasis on joined up working presents welcome opportunities for voluntary and community groups but it also presents a lot of difficulties that are yet to be resolved: lack of resources to participate, agendas dominated by statutory interests, lack of mutual understanding, proliferation of partnerships into a bewildering and complex system that few people understand. The need to work through these problems will inevitably have an impact on RVA’s work. The direct implications of the partnership environment for RVA are that we must be able to think creatively across organisational boundaries and prepared to form alliances for joint funding bids and joint project management.

#### **4.6 The Funding Climate**

In spite of what is said in the opening paragraph in this section there are signs that the voluntary and community sector is entering a more austere funding climate. The disposable income of the grant making trust sector has been badly hit by a depressed stock market. Estimates are that giving from this sector is down by 30% - 40%. The Single Regeneration Budget, one of the few sources of multi year funding for the sector (from which Reading has gained considerable benefit) has ended . European funding is likely to be redirected to the new members of the European community who join in 2004. There are worrying indications from the Government that

statutory sources of funding will be increasingly focused on those organisations that can deliver mainstream public services. This will benefit some organisations in the sector but the large majority will not benefit. Local authority grants budgets are as hard pressed as ever.

#### **4.7 Conclusion**

It is a time of increased recognition and opportunity for the voluntary and community sector. The role of capacity building and infrastructure support organisations such as RVA is being given unprecedented recognition. So long as we are clear about our mission we can negotiate the various pitfalls that come with the opportunities. We will need to work hard at fundraising and income generation. Over the next 5 years RVA must make the most of this relatively warm climate. How long it will last we do not know. However, we can be sure that it will not last for ever. If we do not take the opportunities while they are there we will have only ourselves to blame when they have gone.

## **5 THE STRATEGIC AREAS**

The following pages look at the seven strategic areas identified

- A Developing Core Services to the Voluntary and Community Sector
- B Developing Partnerships and Influence
- C Marketing and Communication
- D Developing Staff and the Board of Trustees
- E Premises for RVA
- F Funding and Fund Raising
- G Information and Communications Technology

(A) **DEVELOPING CORE SERVICES TO THE VOLUNTARY AND COMMUNITY SECTOR**

1 **Description**

This section deals with RVA`s core services to the voluntary and community sector with the exception of partnership development which is dealt with in the following section

2 **The Context**

RVA has a well established set of infrastructure support services for voluntary and community organisations. These can be categorised as:

- Advice
- Advocacy for the Sector
- Development Support
- Information
- Project Development
- Volunteering Development
- Training

These services are underpinned by a Community Development approach which seeks to build the capacity of organisations to be independent and effective service providers.

Since its relaunch in 1989 RVA has at times struggled to manage the gap between rising demand for these services and its capacity to deliver them. The organisation is currently better resourced than at any time in the 1990s but this has to be viewed in terms of the changing external environment described in section 4. The political context is continually driving up expectations of the sector which are woven into almost every aspect of social policy. In consequence the demand for RVA`s services has never been higher. It is true that there is an unprecedented recognition of the importance of infrastructure support organisations but within this favourable climate we can identify some important challenges:

A2.1 As the implementation of the Cross Cutting review progresses there is an increasing emphasis by Government on the role of the sector in the delivery of mainstream public services. For some organisations this presents great opportunities. RVA must recognise this. However, in delivering its services it must remember that many organisations have no interest in going down this road. Such organisations are important for the

reasons given in section 3 of this plan (RVA's Values) not because they fall into some aspect of a government agenda.

A2.2 The impact of the digital revolution on information provision demands resources and skills which RVA does not have in sufficient quantity.

A2.3 RVA's ability to meet the needs of small community groups is currently sustained by a Community Fund Project which is due to expire in October 2004. Our ability to provide core services to this vital part of the sector will be severely compromised unless we can secure further resources dedicated to this kind of work

A2.4 The Voluntary Action Centre and in particular the matching up service for the public is in danger of becoming a victim of its own success. Operating on a resource base that is less than RVA sought when the VAC was established, the service has seen a dramatic month by month rise in the number of people requesting help. If this rise in demand continues beyond the short term the situation will not be sustainable.

A2.5 RVA has experienced growth from 3 employees in 1990 to 13 employees and a volunteer team at the end of 2003. However its resources in terms of core administrative employees are the same now as they were 1990.

### **3 Strategic Objectives**

By 2009:

A3.1 the impact of RVA's core services will be visible in terms of increased organisational competence across the sector. Effective management and governance will be commonly held priorities with high levels of awareness around legal obligations and good practice. A strategic approach to fundraising will be embedded in the practice of many organisations.

A3.2 RVA will have made the most of the opportunities presented by the Cross Cutting Review. There will be a co-ordinated, joined up approach to infrastructure support in Reading with RVA recognised and understood as a leading agency in this field.

A3.3 RVA will ensure the long term impact of dedicated resources for work with the Community Sector will be manifest in several ways. Minority communities will have a stronger and more confident voice. Small groups with the potential and ambition to grow will have been enabled to do so.

Neighbourhoods experiencing deprivation will be better able to articulate and meet their needs. New groups meeting previously unrecognised needs will have been supported into a position of strength.

A3.4 RVA will have ensured a town wide recognition of the strategic importance of volunteering to the well being of the population. Through research RVA will have demonstrated the social and economic value of volunteering to Reading. The Voluntary Action Centre will be successfully placing hundreds of volunteers per year and will have secured increased resources to meet the ever growing interest in voluntary work.

A3.5 RVA will have developed a strategic and co-ordinated approach to the training needs of the sector, benefiting from the work of the Training Co-ordinator post. Partnership work and joint provision with Reading Adult and Community College, Reading Borough Council and other voluntary sector providers will be commonplace. An increasing number of courses delivered by RVA will be accredited. A strong relationship with Berkshire's Learning and Skills Council will be based on mutual understanding and ongoing funding for training work. RVA development staff will all be trained as trainers to be able to deliver training in their own area of work. RVA will have become a centre of excellence for community development learning and practice.

#### 4 **Resource Implications**

An organisational diagram showing current structure of RVA including Board of Trustees, sub committees and staffing levels is at Appendix 1 at the end of section D (Developing Staff and the Board of Trustees)

#### **Resource Implications of the Developing Core Services Strategic Objectives are:**

A4.1 The Voluntary and Community Sector (VCS) Infrastructure strategy, emerging from the Cross Cutting Review, has the potential to provide additional resources for RVA. This will become clearer after a RVA lead planned review of infrastructure support for the VCS in Reading has taken place

A4.2 To achieve objectives in relation to information services RVA must find resources to employ a (half time at least) Information Worker

A4.3 To achieve objectives in relation to the Community Sector RVA must find resources that will allow some, if not all, of the work of the Community Groups Project (approx £100,000 p.a to continue at existing level or less if a reduced model is preferred) to continue beyond its current life span.

A4.4 As stated above the Voluntary Action Centre can not sustain the current growth in demand without some additional funding for admin support, advertising and increased staff time if needed.

A4.5 RVA`s ability to meet objectives around training and learning will be enhanced by working in partnership and pooling resources with Reading Adult and Community College, Reading Borough Council and the Learning and Skills Council.

A4.6 In order to manage the pressure on RVA`s infrastructure that will follow from an expansion of core services it will be necessary to find resources to employ an additional Administrative Worker and cover increased management costs. RVA`s policy of full cost recovery should help in this respect.

## 5 **Organisational Implications**

Growth in terms of staff numbers has two major implications for RVA. Firstly, we might outgrow our existing premises in Cross St. assuming that our current lease can be renewed. Secondly growth beyond the existing establishment will merit a thorough review of the management structure of the organisation in addition to an annual review.

## 6 **Targets**

A6.1 **By July 2004** to have submitted at least two bids aimed at continuing RVA`s capacity for work with community groups

A6.2 **By September 2004** to have established the feasibility of developing an infrastructure support strategy for Reading`s voluntary and community sector working in partnership with other agencies delivering infrastructure services. Strategy to identify strengths and weaknesses of current situation

A6.3 **By December 2004** to have submitted or enabled bids for Active Communities Unit infrastructure funding on the basis of A6.2

A6.4 **By January 2005** building on the learning from the Employee Volunteering University of Reading (EVUR) project to have developed a strategy for a further employee volunteering project, with another partner, working within the Business Community Partnership

A6.5 **By April 2005** to have secured additional core funding to help manage the pressure on the Voluntary Action Centre

A6.6 **By December 2005** to have commissioned a substantial piece of research on the social and economic value of volunteering to Reading

A6.7 **In the year 2005/6 and subsequent years** to support on average a 10% growth the number of clients registering for voluntary work

A6.8 **In the year 2005/06** track what happens to clients registering to volunteer at the VAC in a particular month.

A6.9 **By March 2006** to have secured funding (18 hrs approx £17k per annum) for an Information Officer post

A6.10 **By April 2006** to be presenting a fully co-ordinated annual RVA training programme of 15+ events, of which as many as practicable will be accredited

A6.11 **By April 2006 and in the first quarter of each subsequent year** to have reviewed the adequacy of administrative support with a view to the forthcoming work programme.

A6.12 **By December 2007** to have planned and held a milestone event on Volunteering in Reading for all stake holders

## **(B) DEVELOPING PARTNERSHIPS AND INFLUENCE**

### **1 Description**

This section deals with RVA's future role as an organisation engaged in some of the key partnerships in Reading. It also deals with RVA's role as an agency that facilitates the ability of the voluntary and community sector in general to engage effectively in partnerships. In both respects a key concern is that the perspectives of the sector should exert a positive and visible influence on the planning and delivery of services to the community.

### **2 The Context**

As observed in section 4 of this document partnership has become a pivotal concept in the delivery of local services. At its best it demands a holistic view of the needs of service users which transcends issues concerned with organisational boundaries. At its worst it involves organisations going through the motions with a tick box mentality.

RVA is involved in a number of strategic partnerships which can be identified as follows:

- Partnerships with those who fund RVA's work. These are distinguished by a semi contractual relationship usually in the form of a service agreement. They are quite different from multi agency partnerships. Nevertheless, RVA's approach to the relationship, particularly where the funders are local with a strong interest in Reading, is one of partnership
- The Local Strategic Partnership (LSP) for Reading where RVA's Manager is on the Board
- The Chief Officers Partnership Group where C.O.s including RVA's Manager get together informally to liaise over the health and social care agenda.
- Reading Business Community Partnership on which RVA has representation both by a member of staff and by a trustee
- Reading Compact Steering Group where RVA's Manager has an automatic place
- The Healthier Reading Partnership on which RVA's Partnership Development Worker has a place
- The Community Development Forum in which RVA staff are engaged both as convenors and as participants
- The Training Co-ordination project funded by The Learning and Skills Council with participation from The Lifelong Learning Partnership,

Information Advice and Guidance, Reading College and Reading Adult and Community College.

- Reading Voluntary Sector Forum in which RVA has a role in terms of support, representation on the committee and general participation by staff. The separate but complimentary roles of RVA and the Forum could be summed up as follows: RVA develops and encourages involvement in partnerships by the sector. The Forum provides the democratic infrastructure which delivers partnership representation.

RVA has a Partnership Development Worker (PDW) jointly funded by Reading Borough Council and the Primary Care Trust. The post holder works closely with Reading Voluntary Sector Forum (RVSF). The Forum conducts annual elections which currently deliver 30 sector representatives onto 23 partnership bodies. The PDW supports these reps. through training, networking, liaison with NHS and Social Services staff and general community development support.

The Primary Care Trust and Reading Borough Council are voluntary sector friendly as is evidenced by their support for the PDW post. The system described in the above paragraph is undoubtedly well advanced in terms of what happens with regard to partnership development in other parts of the country. Nevertheless there is a long way to go before we can say with real confidence (as someone has suggested) that partnership is the “new governance” at the local level. Specifically, the following issues can be identified:

B2.1 The proliferation of partnerships produces an ever more complex and impenetrable system on which very few people have a clear perspective

B2.2 The capacity of the local voluntary and community sector to engage is limited by time, financial resources, lack of skills, lack of knowledge and sometimes, it has to be said, lack of vision.

B2.3 In particular it remains very difficult to effectively engage small community groups in key partnerships. Black and minority ethnic groups and other groups such as those representing, lesbian, gay and bi-sexual people, people with disabilities, etc. are small and unstaffed. This results in a failure to reflect diversity.

B2.4 The capacity of statutory agencies, particularly with regard to the NHS and Social Services, to take on board and work with voluntary sector perspectives is limited. This is related to the relentless target setting which central government imposes with its attendant system of rewards and sanctions. The culture generated by this system is not conducive to

preventative work, flexible local solutions, creativity or strategic thinking about cross sector relationships

B2.5 Developing partnerships requires the long view. It is not easy to work out how to conduct a relationship between, in the case of Reading Borough Council, an organisation of 5000 employees and an entire local sector comprised of some 500 organisations. Neither is it easy to set aside the historical baggage of previously bad relationships.

### 3 **Strategic Objectives**

By 2009:

B3.1 the involvement of Reading's voluntary and community sector in "joined up" planning and delivery of public services will have enabled services to become more responsive and effective in meeting the needs of users

B3.2 the voluntary sector's representatives in multi sector partnerships will be setting the agenda as well as responding to the agendas of the other sectors

B3.3 The Community Development (CD) approach, giving local communities an effective voice in service planning and delivery, will be valued and deployed by NHS agencies such as the Primary Care Trust. CD work will be recognised as the means to overcome the problem of community group engagement with partnerships. RVA, working with the Community Development Forum and statutory partners, will have established a town wide strategic approach to CD.

B3.4 the Reading Voluntary Sector Forum needs to be properly resourced and firmly established as the democratic vehicle which gives the sector a voice and delivers effective representation on to a range of carefully considered partnerships. The relationship between RVA and the Forum will be close but their distinct identity and role will be clear to stake holders

B3.5 the impact of RVA's Partnership Development Worker post will have been established by a thorough external evaluation process. The results will have enabled appropriate adjustments to the service to have been put into effect. (see B4.4)

B3.6 the culture of engagement with partnerships will be firmly established amongst Readings voluntary and community organisations. A pool of experienced and capable representatives will have been built up enabling a more assertive engagement by the sector.

B3.7 an effective Compact with the NHS will have done much to develop the sector's relationship with NHS organisations. There will be ownership of the Reading Compact by senior managers, board members, councillors and voluntary and community organisations. Through the Compact a widely accepted grant making and commissioning process between the NHS and the sector will have been developed and proved to be working well.

B3.8 RVA will have supported the Business Community Partnership (BCP) to become an effective focus for Corporate Community Involvement enabling mutual understanding and dialogue between the private and voluntary sectors. Successful joint projects will have firmly established the credibility of the BCP

B3.9 RVA will have established the importance of the sector's contribution to the Local Strategic Partnership. In particular it will have helped the LSP to draw on the grass roots understanding of social inclusion issues which is embedded in the sector's activities. RVA will have played a role in locating the resources which can unlock this added value.

B3.10 RVA will be recognised well beyond the confines of Reading as a leading voluntary sector agency in the development of partnership work. It will be acting in a consultancy role with regard to new partnership ventures as the process of reinvigorating public services continues to unfold.

#### 4 **Resource Implications**

B4.1 The development and effectiveness of the sector's representatives depends on finding resources for training. For unpaid volunteers acting as representatives there is also an issue about paying their expenses which is not common practice. Whilst neither of these are issues about RVA's direct costs they nevertheless have a strong bearing on the success of our work.

B4.2 The promotion of Community Development through the very successful CD Forum is currently resourced by the Community Fund through RVA's Community Groups Project. Should there be no continued funding from The Community Fund, serious consideration will need to be given to resourcing the CD Forum in other ways.

B4.3 The Voluntary Sector Forum has no staff and very little money. It relies heavily on support from RVA's Partnership Development Worker (PDW). The Forum needs dedicated staff and a strategy to achieve this. If

it is successful RVA's PDW will be able to devote more time to supporting partnership representatives and less time on servicing the infrastructure that delivers them. RVA may have to consider acting as the employer of Forum staff which would have management and administrative implications.

B4.4 A thorough evaluation by an external consultant (as in B3.5) will cost in the region of £5000 - £10,000

B4.5 Unlocking the sector's contribution to the social inclusion strategy of the Local Strategic Partnership will involve securing resources to employ a worker who will support the Inclusive Society Delivery Group of the LSP. It is possible that RVA will become the employer of this person

B4.6 If RVA can establish itself as a leader in the field of partnership working there is some potential for income generation through consultancy work.

## 5 Organisational implications

The considerations that are expressed in section A.5 with regard to growth in staff numbers also apply here

## 6 Targets

B6.1 **By July 2004**, working with the Voluntary Sector Forum, to have secured the necessary finance to deliver a high quality training programme to improve the skills and understanding of voluntary sector representatives in partnership bodies.

B6.2 **By July 2004** to have secured agreement within the Reading Compact about the principles and practice of the NHS engagement with the Compact and to have prioritised a work programme.

B6.3 **By September 2004** to have clarified RVA's role with regard to the development of the Social Inclusion Strategy of The Local Strategic Partnership.

B6.4 **By December 2004** to have encouraged Reading Voluntary Sector Forum to have submitted at least 2 bids for the funding of its own work in relation to partnerships

B6.5 **By December 2004** to have ensured that sufficient funds have been raised to pay for an external evaluation of the effectiveness of RVA's Partnership Development Work

**B6.6 By April 2005** the Community Development Forum, supported by RVA will have sought to collaborate with Reading Borough Council in a strategic review of how community development resources in the town can be deployed to best effect

**B6.7 By April 2005** will have assisted Reading Primary Care Trust (PCT) to have initiated a piece of grass roots community development work in support of the PCT's neighbourhood approach. This work will aim to engage local communities with the public health issues in their locality, working with the PCT to find solutions

**B6.8 By October 2005** to have completed the evaluation of the Partnership Development Work and agreed the measures necessary in response to its findings (depends on achievement of B6.5)

**B6.9 By October 2005** to have established, working with the NHS through Reading Compact, accessible policies and procedures concerning NHS commissioning and grant making with regard to the sector (depends on achievement of B6.2)

**B6.10 By January 2006** to have assisted the Business Community Partnership to have implemented two further (c/f A 6.4) community projects which engage the private sector

**B6.11 By April 2006** to have ensured that the Reading Voluntary Sector Forum has core funding from the Borough Council and the Primary Care Trust

**B6.12 By December 2007** to have held a high profile Community Development Conference in Reading, celebrating the good practice in the town and engaging all sectors in the power and potential of community development work

**(C) MARKETING AND COMMUNICATION**

**1 Description**

This area of work addresses the development of Marketing and Communication activity required to meet the aims of RVA

**2 The Context**

Marketing and Communication activities are being delivered, but there is no overall strategy to focus the work and deliver the greatest benefit to RVA. Activity is undertaken because it has always been done, because there is a perceived need or because there has been a request from a funding organisation or partner for information. Activity is undertaken by the administration staff or staff involved in the particular project being publicised.

In response to the needs of the voluntary sector a number of different brands have evolved. Currently they all appear to operate under the RVA brand but it is unclear what this is. The need to establish the 'Brand' is required before developing a corporate style and promotional content.

A regular review of external communications is essential and the messages contained within will always be seen as contributing to the RVA brand. Internal communication with staff and trustees also needs regular review to ensure the most efficient use of resource. It should also contain information resulting from the interface with RVA's customers/clients and from its staff and trustees.

Media relationships are essential to RVA being seen as a leader at local, regional and national level within Voluntary Sector. The media profile created already by the Voluntary Action Centre require expansion across the whole of RVA to create a coherent and unified 'public face'.

The web site is now a key communication tool for RVA which requires further development and constant review to ensure it provides the most effective and comprehensive information to its clients. The development and use of the tracking system is required to inform RVA of how people are using the site. This information will help not only development of the site but will aid future promotional activity with the client base. The need for a feedback area is also paramount to continued evolution of the web site.

Much has already been achieved, but now RVA needs to formalise and plan its approach to all Marketing and Communication. Building the brand is an essential and initial platform for doing this. However, in doing so, projects and core areas i.e. CGP,VAC etc. must retain their unique identities under the brand.

### 3 **Strategic Objectives**

By 2009:

C3.1 RVA will be recognised and trusted as a community development agency of the highest quality.

C3.2 RVA will be regularly invited at a local, regional and national level to represent the voluntary and community sector case.

C3.3 RVA will be a trusted source of up to date information about the voluntary and community sector; nationally, regionally and locally.

C3.4 RVA will have expertise in Marketing and Communication (including management information).

C3.5 RVA will have a tried and tested system which identifies RVA's target audience and enables the development of appropriate communications which echo the mission, vision and values.

### 4 **Resource Implications**

C4.1 RVA needs to acquire the expertise, either through a volunteer or a business secondment, to develop and implement a marketing and communication strategy.

C4.2 Dependent on the development of marketing and communication strategy a spend to launch the RVA brand etc. will result in a cost beyond current budgets.

C4.3 As a result of C4.2 above the Board will need to consider the constitution of a marketing budget.

### 5 **Organisation Implications**

C5.1 A greater focus on Marketing and Communications will require prioritisation within RVA and the possible formation of a sub committee to review the strategy and way forward.

## 6 **Targets**

C6.1 **By July 2004** – to have reviewed the RVA annual report to facilitate use as a promotional marketing document.

C6.2 **By November 2004** – to have formed a marketing and communication working group and to have formulated for discussion by the board and staff an outline of what the RVA Brand is.

C6.3 **By March 2005** – to have delivered a training programme that improves the skills and strategies required to lobby and influence successfully for staff and trustees as required.

C6.4 **By April 2005** – to have created a web site development strategy which includes tracking and reflects the evolution of RVA and reflects marketing and communications needs. **Thereafter annual review.**

C6.5 **By June 2005 and in subsequent years** – to have reviewed all internal and external communications. **Thereafter annual review.**

C6.6 **By April 2006** – to have secured the expertise required to develop a marketing and communication strategy; to deliver a plan for each year, with key marketing and communications activities mapped out to avoid overload and clashes. This strategy will cover:

- Media
- Influencers
- Users
- Funders

**(D) DEVELOPING STAFF AND THE BOARD OF TRUSTEES**

**1 Description**

This area of strategy covers the development of the Board, employees and volunteers of RVA. Where the term staff is used it refers to both employees and volunteers. It also covers the review and evaluation of the implementation of the 5 year strategy, this being a fundamental role of the Board of Trustees.

**2 The Context**

**D2.1 General**

There are a number of contextual factors that have a direct bearing on the way in which RVA handles the development of trustees and staff. Firstly, the recent expansion of the organisation has made a more complex task of management, governance and the development of knowledge and skills amongst personnel. Secondly, the higher profile and expectations with regard to the voluntary and community sector described in section 4 are accompanied by increasing pressures to drive up professional and quality standards. Thirdly, recruitment and retention of employees is difficult for a relatively low wage sector in a high wage, high cost of living local economy. Lastly, Reading is a town with an ethnically and culturally diverse population. RVA's work force needs to reflect this both in composition and in the way in which services are delivered.

**D2.2 Board of Trustees**

There is currently a Board of 15 members with the potential to co-opt up to an agreed maximum of 18. The Board is supported by three committees: Finance, Management & Staffing and Evaluation & Review. This structure may change in the light of the review described below. The terms of reference of each committee are reviewed annually (as in D6.9)

**D2.3 Staff**

RVA has a funding commitment via a 3 year service agreement from Reading Borough Council for the following posts: Manager, Deputy Manager, Office Manager (p/t), Administrative Assistant (p/t), Volunteering Development Manager (p/t) and Volunteer Co-ordinator (p/t).

A new 3 year service agreement starting in the year 05/06 will be negotiated in the second half of 04/05.

A Partnership Development Worker post is jointly funded by the Borough Council's Social Services and Housing Dept. and Reading Primary Care Trust.

An Advice Worker post is funded by the Earley Charity. This post is subject to a 2-year rolling review.

A Training Co-ordinator post (p/t) is funded by Berkshire Learning and Skills Council for 2 years from November 2003

A Project Worker (p/t) to promote employee volunteering in Reading University is funded by the University for one year from January 2004.

Finally, a Community Groups Project managed by the Deputy Manager of RVA is financed by the Community Fund until November 2004. This project employs a Neighbourhood Development worker, Town wide Development Worker and a Project Support Worker (p/t).

#### D2.4 Volunteers

The Voluntary Action Centre currently has approximately 3,307 volunteers registered on its database (working as volunteers or seeking voluntary work). Voluntary work through the Centre's matching up service is provided by 325 referral organisations registered with RVA.

16 volunteers are delivering a core service by working in the Voluntary Action Centre

#### D2.5 Current Practice -Management of Staff

Employees undergo a full and structured induction programme when joining RVA. Every employee is given regular supervision by their line manager on a 6 weekly basis and has an annual appraisal following a structured format. Similarly, under RVA's Volunteer Policy volunteers have a structured induction programme when joining the organisation and regular supervision. All staff are encouraged to undergo continuous development and learning within budgetary constraints.

#### D2.6 Current Practice - Governance

RVA has a tradition of a strong and capable Board of Trustees which has a positive and supportive relationship with staff. The role of employer is taken seriously. The production of a 5 Year Strategic Plan is clear evidence of the Board getting to grips with the key function of strategy development. The recent growth in the organisation has necessitated a more strategic focus and it is probably true to say that there is still much to

learn about the role that is concerned with “creating the future” rather than “minding the shop”. There are two particular issues of concern here. One is the effective functioning of sub committees. In recent years there have been problems with low attendance and , at times, uncertainty of role. The other is how the Board retains ‘grass roots’ community involvement in an increasingly complex and strategic approach to governance.

The induction of new trustees is taken seriously by the Board but the process needs further thought and some refinement. RVA training programmes are open to trustees free of charge. They are encouraged to attend these and also the NACVS national conference which has many learning opportunities for them.

RVA’s Memorandum and Articles of Association are cumbersome and do not reflect the needs of a modern charity.

### **3 Strategic Objectives**

By 2009:

D3.1 RVA will be widely known locally, regionally and nationally as a learning organisation in which all personnel are encouraged and have equal opportunity to develop their knowledge, skills and understanding.

D3.2 RVA will have a staff team and Board of Trustees that reflects the diversity of the communities they serve (see RVA’s Equal Opportunities Policy).

D3.3 RVA will have a Board of Trustees broadly consisting of membership as follows:

- (a) 3 members from the private sector
- (b) 3 members from statutory organisations
- (c) 3 members who are volunteers with RVA
- (d) 7 members from, or nominated by, voluntary organisations that use RVA’s services, 3 of whom will be from community groups
- (e) 2 members who are co-opted to provide particular areas of knowledge and skills

D3.4 RVA will attempt to have the following areas of knowledge and skills spread amongst the trustees listed in 3.3:

- (a) financial management
- (b) human resources management

- (c) marketing and public relations
- (d) fund raising
- (e) legal
- (f) community development
- (g) working in voluntary organisations
- (h) working in small community groups
- (i) IT

D3.5 RVA will be undertaking an annual review, prior to the AGM, of the composition of the Board in terms of knowledge and skills with a view to filling any gaps

D3.6 RVA will have a structured induction programme, which is the responsibility of the Board, for new trustees.

D3.7 RVA will be offering training opportunities to trustees based on an assessment of needs conducted after the AGM.

D3.8 RVA will have in place an established system of succession planning with regard to the role of Treasurer and Chair. The latter will be based on having a Vice Chair who will be the "Chair in Waiting".

D3.9 RVA will have written internal procedures and terms and conditions of employment which are comprehensive in their coverage of best practice in: recruitment, staff management, personal development, succession planning and equal opportunities. These will be overseen by the Management and Staffing Committee.

D3.10 RVA will be spending annually a minimum of £150 per Board member, £300 per paid member of staff and £150 per volunteer working directly for RVA. This may in part be through the provision of free places on RVA's training programme for its users.

D3.11 RVA will be able to recruit and retain quality employees by ensuring that salaries are competitive, and attractive and supportive conditions of service are in place.

D3.12 RVA will have sufficient paid staff with management skills to ensure that new initiatives can be researched and planned for without detrimentally affecting the core business of RVA. The Board will have ensured that senior managers have sufficient time to undertake work on strategy and policy development.

D3.13 RVA will be involving at least 25 volunteers per week across RVA and, building on its policy with regard to volunteers, will have a reputation

for being a centre of excellence in the way that volunteers are treated and provided with opportunities for development.

D3.14 RVA will have a continuous development and learning culture that is owned by Board and staff alike. This will have a significant emphasis on the development of IT skills. The focus will be on outcomes as the indicator of organisational effectiveness and a system of work programming will have been developed that is integrated with the objectives and milestones of the 5 year strategic plan.

D3.15 RVA will have an efficient working relationship between the Board and its' sub committees based on a clear understanding that sub committees undertake work on governance, performance management and the role of employer and bring the results of their work to Board meetings in the form of clear recommendations.

D3.16 RVA will have a new governing instrument (constitution) that is appropriate to the way in which the organisation operates and reflects the forthcoming changes in charity law

D3.17 RVA will have trustees that embrace the role of ambassadors for the organisation and represent its interests in a variety of external meetings, forums, etc.

#### **4 Resource Implications**

D4.1 The expenditure implications of sub section D3.10 on training will need to be matched by incoming resources. They are, however, offset to some extent by the free access to RVA`s sector-wide training which RVA offers to staff and trustees. Clear budgets for staff and Board training will be necessary

D4.2 Being competitive with regard to recruitment and retention of employees (sub section D3.11) has clear expenditure implications in that RVA needs to pay at the top end of the range of salaries that might apply to a post. This will require a clear strategic case to be made out to funders

D4.3 Any review of organisational structure carried out in the light of the strategic plan may have expenditure implications.

D4.4 Sufficient administrative staff may require additional core income.

## **5 Organisational Implications**

Once RVA's strategic plan is adopted there will be a need to review its staffing and committee structure. Strategic plans have to be fluid. There is a difficult issue about how staff who are working at full capacity can rearrange priorities to cope with new developments. Occasionally, important new developments will require Chairs' action in consultation with the manager.

## **6 Targets**

D6.1 **By April 2004** the 3 sub committees to have reviewed their terms of reference for Board approval. **Thereafter annual review** to take place in the January – March quarter

D6.2 **By September 2004** Board to have agreed an induction programme for new trustees (ahead of the AGM). **Thereafter annual review** in the July to September quarter

D6.3 **By February 2005** Board and senior management review and evaluate the implementation of the strategy, making appropriate recommendations and extending it by one year. Staff team produce annual work programme on the basis of the 5 year strategy. **Thereafter annual review** in the January to March quarter.

D6.4 **By March 2005** the Board to have reviewed its composition in terms of sub sections D3.2, D3.3 & D3.4 in this section. Steps to already have been taken using the power of appointment (co-option) to address some of the most pressing deficiencies in Board make up. **Thereafter annual review** to take place in the July to September quarter prior to the AGM.

D6.5 **By March 2005** Board to have made an assessment of its own training needs and plans to meet them. **Thereafter annual review** in the July to September quarter

D6.6 **By March 2005** to have in place a succession plan for the Chair and Treasurer of RVA

D6.7 **By June 2005** the Board to have reviewed the structure of the organisation in the light of the strategic plan and made appropriate recommendations. The review to include the committee structure, the staffing and management structure, recruitment and retention (3.11 above) and the issue of having the capacity to research and develop new initiatives (D3.12 above)

D6.8 **By September 2005** the Board to have reviewed both its own effectiveness and that of sub committees with regard to strategy and continuous improvement and learning.

D6.9 **By September 2005** to have deployed trustees in a number of “ambassadorial” roles in which they represent RVA

D6.10 **By March 2006** to have conducted or commissioned an of external evaluation focused on the outcomes of an area of RVA’s work

D6.11 **By March 2006** to be involving 20 volunteers across the organisation.

D6.12 **By June 2006** to have reviewed RVA’s requirement for a new governing instrument (constitution) and to have identified which is appropriate.

D6.13 **By September 2006** to have adopted a quality assurance framework that is appropriate to an infrastructure support organisation and begun work adapting to it.

D6.14 **By September 2006** to have shifted the emphasis in the annual report to describing outcomes rather than activities and outputs

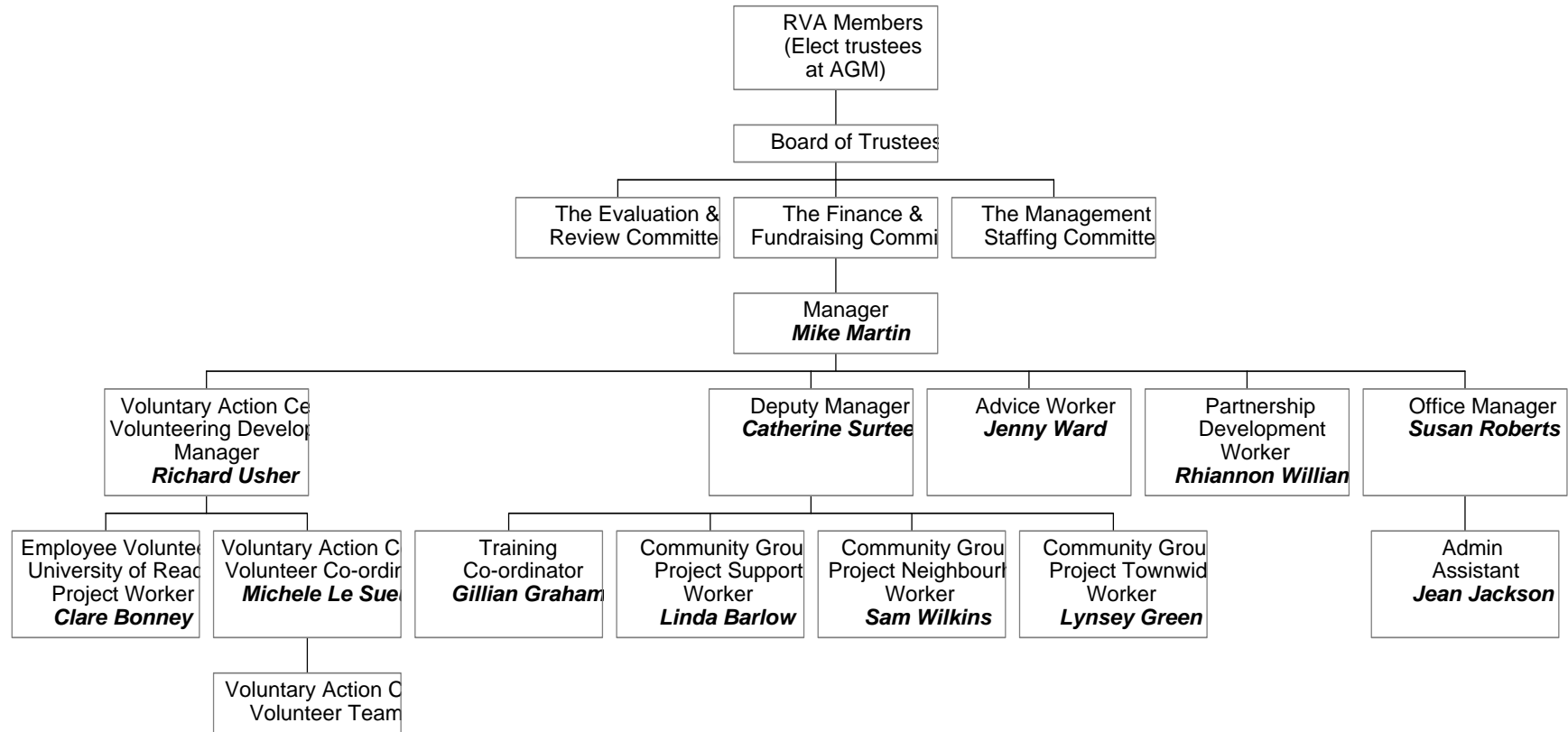
D6.15 **By November 2006** to have sought adoption of the new governing instrument at the AGM.

D6.16 **By March 2007** to be involving 22 volunteers acting as staff for RVA

D6.17 **By September 2008** to have adopted/implemented all relevant systems and procedures required by the chosen quality assurance system (see D6.13)

**(Section D) Appendix 1**

**CURRENT STRUCTURE OF RVA INCLUDING BOARD OF TRUSTEES, SUB COMMITTEES AND STAFFING LEVEL**



**(E) PREMISES FOR RVA**

**1 Description**

This area of strategy covers premises occupied by RVA.

**2 The Context**

RVA occupy two rented buildings in the centre of Reading at 8 Cross Street and London Street.

The spread of staff and volunteers is as follows:

**E2.1 8 Cross Street**

The base for all RVA's core funded activities.

Ground Floor : Voluntary Action Centre

2 RVA Core Staff  
3/4 volunteers on either Tue/Wed/Thu  
2 volunteers on Sat

1<sup>st</sup> and 2<sup>nd</sup> Floors  
5 RVA Core Staff

The building also has a library and basement rooms comprising : meeting/computer room, store, kitchen and boiler room.

E2.1.1 Cross Street lease ends 12 January 2005 and renewal is at the discretion of the landlord regardless of whether or not RVA's preference is to stay or go. Present rent is £18k per annum but which it is thought likely to rise substantially as there are plans for improvements within the whole area.

E2.1.2 The Voluntary Action Centre (VAC) is wheelchair accessible, is in a position of high visibility as the shop front is close to Marks & Spencer and is in a main thoroughfare between shops and buses/trains. Statistics show that more clients come to volunteer via the window adverts/window display than by any other means. The current location plays a large part in the success of the centre.

E2.1.3 £30,000 has been invested by RVA on improvements (wheelchair access, basement works, networking).

## E2.2 London Street

The base for CGP which is a time limited project.

1<sup>st</sup> Floor

RVA Deputy Manager  
4 Project Staff

This is an open plan area with free-standing partitions to create a main office, a manager's office and a small reception/library area.

E2.2.1 The current rent and service charge is £11.4K per annum and the lease expires at November 2004.

Depending on the future of CGP and its continuance beyond November 2004 will determine future premises needs.

An assessment of the state of the property market and the implications for RVA are mixed. Reading is in the high South East property value belt, is a boom town, has a major shopping complex (Oracle) and has seen some of the most dramatic rises in prices during the past few years.

## 3 **Strategic Objectives**

By 2009:

E3.1 RVA will provide secure premises which give staff, volunteers and clients an environment in which they feel safe.

E3.2 RVA will consider the possibility of establishing a Voluntary Resource Centre for Reading working with partners from all sectors. This might prove to be a new home to RVA.

## 4 **Resource Implications**

E4.1 Funding for new/existing premises to meet future growth. including legal and negotiation fees.

E4.2 Funding for repairs and refurbishment

E4.3 Disability Discrimination Act as from 2004 will place a strong obligation on trustees to provide accessible services (i.e. premises). Failure to do so will require good reasons, Lack of resources might qualify as such but the burden of proof will be on RVA. (Good accessible premises are hard to find in Reading).

E4.4 Any move will add a substantial cost to RVA in terms of one-off items i.e. negotiation, removal, legal fees, networking, printed stationery (letter heads etc). Substantial amounts of staff time will need to be devoted to research, negotiation, securing increased funding etc.

## **5 Organisation Implications**

E5.1 The success of the VAC and the advantage of the current position in Cross street raises the question of whether RVA should consider housing core RVA and the VAC at different sites. This would of course present both logistical and financial burdens.

E5.2 All areas of strategic plan dependent on satisfactory premises.

## **6 Targets**

E6.1 **By April 2004** - establish whether RVA wish to or will be permitted to retain 8 Cross Street – if yes then, within 12 months - rent negotiations, property search and source of funding should begin.

E6.2 **By May 2004** – if outcome of 6.1 is that RVA will be moving from 8 Cross Street then consider a split of RVA and VAC into two locations. By its' nature the VAC has a greater need to be in the town centre thereby incurring higher rent.

E6.3 **By July 2004** – make a decision on whether or not to negotiate a further lease on London Street.

E6.4 **By July 2004** – dependent on E6.1 and E6.2 “Employ” a consultant to project manage the whole premises issue i.e. rent negotiation, property search.

E6.5 **By July 2004** – develop a schedule of requirements to provide for RVA up to 2009.

E6.6 **By September 2004** – negotiate with existing funders to cover increased costs.

**(F) FUNDING AND FUNDRAISING**

**1 Description**

This area of strategy covers fundraising for RVA.

**2 The Context**

RVA at present hold a tight budget which has always carried a shortfall between the operational funding and the operational expenditure; additional funds have always been required and have been found.

The principal funders are Reading Borough Council, Earley Charity and The Primary Care Trust with grants totalling £200k per annum which presents a shortfall in the current financial year (03/04) of approximately £25k.

The Gap being “plugged” by charitable donations and charges to RVA users.

The trend is towards an increasingly diverse funding base with staff doing the big F/R bids e.g. Community Fund. Trustees help with smaller bids.

There is an increasing emphasis on partnership working with corresponding opportunities to make joint bids for funding with other organisations.

**3 Strategic Objectives**

By 2009:

F3.1 RVA will have strategic funding that meets RVA’s core expenditure including core staff, premises, equipment updates and replacements.

F3.2 RVA will ensure that funds reflect the growth and importance of the organisation.

F3.3 RVA will have recruited a fundraiser.

#### **4 Resource Implications**

F4.1 The time required to research or find extra funding, will require staff to undertake a considerable amount of work. RVA will have to make time for staff to do this work and this will mean workload restructuring and postponing and/or cancellation of minor projects etc.

#### **5 Organisation Implications**

F5.1 In order to procure more and continued funding, there will be a solid commitment from RVA's board to prioritise time for staff to meet the funding challenge.

F5.2 RVA must be prepared to form alliances/partnerships that will enable/strengthen funding bids.

F5.3 Grant application writing and the resource required.

#### **6 Targets**

F6.1 **By December 2004** - prepare and make a bid for capacity building and infrastructure money coming on stream from the Cross Cutting Review.

F6.2 **By January 2006** - add a voluntary or paid consultant to the organisation to research, negotiate and apply for funding in the smaller fund raising areas.

F6.3 **Each July** - With immediate effect, RVA to take political sounding of the approach to grant providers to increase base grant and ensure future grants reflect the strategic future of RVA.

F6.4 **By March 2009** – to have recruited a Fund Raiser

**(G) INFORMATION AND COMMUNICATIONS TECHNOLOGY**

**1 Description**

This area of the strategy covers;

Information and Communications Technology (PCs, Printers, Networks, Software Applications, Email, Web and Web Diary, Mobile communications etc)

The management of information that RVA requires to provide services to its client groups and to support the monitoring and evaluation of it's work.

**2 The Context**

Over the past few years RVA has evolved and expanded from its main core service based in the upper floors of Cross Street into a second office in London Street (in 2001) to accommodate the Community Groups Project, then into the ground floor of Cross Street (in 2002) as the Voluntary Action Centre was assimilated into the organisation. These changes have resulted in an expansion of the IT infrastructure. This was supported by a Home Office grant and allowed for a high specification of IT to be put into place. The investment was in the region of £40,000 and is considered to be an excellent basis for future growth.

**G2.1 IT**

Both Cross Street and London Street offices are well equipped, Apple Macs are the standard and there are an adequate number of devices both computers and printers and the photocopier are linked to the network in each premises. The Community Groups Project has 2 laptop computers, with 2 at the Cross Street office these are used by staff as and when required, on and off site. There are no serious problems and it is believed the present infrastructure is adequate for purpose.

As the Apple Macs have been purchased and installed over a number of years, the operating system (Mac OS9) is consistent across the organisation. RVA has decided to remain on the Apple platform and therefore will need to stay abreast of developments. Apple have based their future on a new and different operating system OSX. Support for OS9 will decline and therefore the transition to OSX will need to be made soon. Upgrading will be required to bring all of the Macs to a standard platform and a feasibility study is being considered to look at the existing software, the costs of future upgrades and the training requirements.

Data is centrally backed-up each day on a weekly cycle, the backup systems are different at the two sites.

The table below summarises the existing IT infrastructure.

	<b>Cross St - RVA</b>	<b>Cross St - VAC</b>	<b>London St</b>
<b>Networking</b>	Comprehensive	Comprehensive	Limited to office
<b>Devices (Macs)</b>	7	5	2
<b>Laptops</b>	1	1	3
<b>Printers</b>	2	2	2
<b>Photocopiers</b>	1	1	1
<b>PCs</b>	1		1

## G2.2 Access to Office Systems

All staff have access to office systems and any specific database that they use routinely. Email and the internet are accessible via the desk-top. The following table summarises the present use of the applications by user, or group of users.

	<b>M</b>	<b>DM</b>	<b>PW</b>	<b>AW</b>	<b>Admin</b>	<b>VAC</b>	<b>CGP</b>
<b>Word processing</b>							
<b>Spread sheets</b>							
<b>Internet</b>							
<b>Email internal</b>							
<b>Email external</b>							
<b>RVA database</b>							
<b>VAC database</b>							
<b>CGP database</b>							
<b>Desktop publishing</b>							
<b>Office diary</b>							

Both buildings have a Local Area Network (LAN) and internal sharing of databases and applications is common within each office but there is no specific link between Cross St and London St, if documents are to be shared they are sent across by email. Staff use a web browser to access the diary system.

### G2.3 Information Management

RVA does not have a standard protocol for naming or saving documents. Documents are filed with a 'recognisable' prefix and all staff have access to each others files. Files are saved on each individual PC, if a document is required then that PC is accessed; there is no password control on individual PCs.

RVA has a 'loose' style where letters and reports are produced in a similar format but there is no formal house style, templates for documents etc.

RVA is still heavily reliant on paper documents. The Directory and the newsletter have so far been word processed and produced and distributed in hard copy. However, the use of email groups to distribute information electronically has increased significantly in recent times.

RVA has a number of separate databases. There is a main database, largely consisting of information about organisations, a database that supports the matching service of the Voluntary Action Centre and databases relating to the work of the Community Groups Project. There is a pressing need to consider the extent to which information can be consolidated into a single database. The ability to access parts of the database via the web site (as a service to users) also needs to be explored.

### G2.4 Security and Confidentiality

RVA have a Data Protection policy in order to meet legal requirements and the manager has the responsibility for ensuring that all staff understand their responsibilities.

A policy covering the use of the ICT equipment in particular internet, email, software and security is to be developed and implemented based upon an existing model.

### G2.5 Communications

The RVA Web site has recently been launched, it is developing as a significant platform for RVA from which it will provide core services to its clients e.g. advice, contacts, training opportunities. The site is managed by the senior team with editorial content the responsibility of particular staff depending upon the subject. The voluntary sector has the ability to fill in application forms on line and to post notices and adverts.

### G2.6 Support and Maintenance

RVA has a limited ability to trouble shoot and maintain equipment/systems in house. Therefore a reliable external contractor is called in as and when needed.

### 3 **Strategic Objectives**

By 2009:

G3.1 RVA will have converted all its paper based information services into electronic format which will be the primary medium for delivery. They will be distinguished by accessibility, imaginative design and a high level of use. The RVA web site will have been developed in the light of experience and will be a major point of access.

G3.2 RVA will have rationalised its use of databases, consolidating as much information as possible into one single database. Users will be able to access the database via the web site subject to the limitations of data protection.

G3.3 RVA will have a dedicated Information Worker overseeing the delivery of the services outlined in G3.1 (see A6.9)

G3.4 RVA staff will have an expanded capability and confidence to use a variety of different software applications/packages.

G3.5 RVA will have a recognisable 'house style' for all documents.

G3.6 RVA will ensure that voluntary sector organisations can access advice, news, training courses etc. via the RVA website.

G3.7 RVA will have developed a phased programme to support the continued upgrade of hardware and software.

G3.8 RVA will utilise one network, regardless of location.

### 4 **Resource Implications**

G4.1 Funding for a rolling upgrade programme of approximately £5k annum to allow development of ICT infrastructure.

G4.2 Ensuring that potential growth in RVA, is covered by sufficient resources.

G4.3 Any change in premises must be assessed in terms of ICT implications.

G4.4 Training of staff to develop their IT abilities will incur a need to buy specialised ICT training.

G4.5 When required major structural web site and database development will involve fee to consultants and contracted external support/maintenance will incur an annual cost.

5 **Organisational Implications**

G5.1 Change in working practices to incorporate increased use of IT and less reliance on hard copy documents. Training will be necessary.

G5.2 New projects will have to be incorporated in ICT structure i.e. email etc.

G5.3 Improving IT specialism/knowledge at Board level.

G5.4 Information Worker recruitment

6 **Targets**

G6.1 **By July 2004** develop and implement a policy covering the use of the ICT equipment in particular internet, email, software and security. **Thereafter annual review**

G6.2 **By September 2004** an investment strategy for IT will be in place.

G6.3 **By December 2004** the role of databases and RVA's information services will have been reviewed and clear proposals for their development and implementation established

G6.4 **By January 2005** an IT champion will be recruited to the Board,

G6.5 **By March 2005** to have produced the first edition of the RVA Directory that is available in electronic format.

G6.6 **By March 2005** review of RVA website including user feedback.

G6.7 **By April 2005** all line managers will have to assess the IT needs of their staff and developed a plan on how to meet them. **Thereafter annual review.**

G6.8 **By July 2005** rationalisation of databases will have been put into effect as will the ability for users to access the database via the web site.

G6.9 **By March 2006** an ICT strategy will have been developed.

G6.10 **By March 2007** an Information Worker will have been recruited if possible.

G6.11 **By June 2007** regardless of RVA's premises situation, all staff will operate via one network.

## 6 **RESOURCING THE PLAN AND FINANCIAL PROJECTIONS**

### 6.1 **Currently**

The situation is that since its relaunch in 1989 RVA has always had a deficit budget with any shortfall being made up from one-off donations or other contributions. This is becoming more and more difficult to sustain.

In the year to March 2003 our activities ( excluding the Community Groups Project - CGP) had an income of £ 223,000 and expenditure of £ 232,000. The deficit of £ 9,000 was found from reserves. In the current year to March 2004 we are projected to have an income of £ 242,000 with expenditure of £ 252,000 , leaving a deficit of £ 10,000 to be found from reserves which will leave nothing to carry forward!

For 2004/2005 the position remains a deficit of say £ 10-12,000 with **no reserves**. This is partly due to the underfunding of the Voluntary Action Centre and partly to general deficit funding in the first place. A draft Income and Expenditure Statement for 2003/2004 can be found at Section 6 Appendix 1 (Page 46).

### 6.2 **Projections**

The success of the Plan in its strategic areas requires :

#### **(A) Developing Core Services to the Voluntary and Community Sector**

Renewal of the Community Fund grant for the CGP. If achieved this consolidates that work but with little effect on our core position. We need to achieve an increase in our core funding of at least £ 30,000 to increase the grant for the Voluntary Action Centre (VAC) by £ 10,000, replace the temporary donation to the VAC of £ 10,000 from the Colefax Trust and address our core deficit of £ 10,000. An increase in core activities (e.g. information services and marketing) will result in a need to employ an additional admin worker (12 hours) for £6.5k per annum

#### **(B) Developing Partnerships and Influence**

Evaluation of the Partnership Development Work.

#### **(C) Marketing and Communication**

Possible marketing expenditure which is dependent on a review process.

(D) Developing Staff and the Board of Trustees

Competitive salaries and adequate training at all levels require additional core income. This needs addressing in 2004/2005.

(E) Premises for RVA

Resources to meet a rent rise which could be in the region of £7-10,000 (or more) or, if a move to new premises is called for, removal costs, legal and negotiating costs, agents etc. A move, if premises can be found, will be costly and disruptive.

(F) Funding and Fundraising

Increased fund raising activity.

(G) Information and Communications Technology

Annual expenditure on upgrading and developing RVA's I.T. capability. This is difficult to quantify in a moving market but spending on upgrades and new equipment will require setting aside in the order of £5,000 per annum.

**6.3 Summary**

There are three different types of funding RVA requires: Increases in Ongoing Operational Costs; Project Costs and One-Off Costs (to meet specific needs). They are as follows:

**6.3.1 Increases in Ongoing Operational Costs**

Section or Section Number	Item	Amount £	Date Applicable
Section A	Current deficit	10,000	)
	VAC deficit and donation	20,000	) 2004
	Additional Admin	6,500	) onwards Dependent on success in other areas.
Section C	Marketing	6,000	2004 onwards
Section D	Likely Support Need	10,000	2004 onwards
Section E	Rent increase	10,000	2005 onwards
Section G	IT Replacement	5,000	) 2004
	IT Maintenance & Consultancy	5,000	) onwards
	Total Per Annum	65,000	

While this may be a 28% rise in our current operational income it has to be appreciated that, historically speaking, the deficit has been built into the organisation's funding for many years.

### **6.3.2 Project Costs**

Section and /or Section Number	Item	Amount £	Date Applicable
Section A A4.3	CGP Project	222,596	Oct 2004-for 3yrs
A6.4	EVUR Project	25,000	Nov 2004 – for 1 yr
A6.9	Information Officer	17,000	By Mar 2006 – for 2 yrs
	Total	264,596	

### **6.3.3 One-Off Costs (to meet specific needs)**

Section and /or Section Number	Item	Amount £	Date Applicable
Section B B6.5	Evaluation of Partnership Work	8,000	Dec 2004
Section C C4.2	Launch of RVA Brand	10,000	Oct2006
Section E E4.1 & E6.4	Employ consultant to negotiate lease renewal and rent.	2,500	May 2004
E4.1	Legal costs associated with lease renew.	2,000	Dependent on lease negotiations
Section F F6.2	Employ fund raising consultant	10,000	By Jan 2006
Section G G6.5	1 <sup>st</sup> edition of RVA Directory in electronic format	6,000	By March 2005
	Total	38,500	

**Section 6 : Appendix 1 - DRAFT INCOME & EXPENDITURE ACCOUNT  
FOR THE YEAR TO 31ST MARCH 2004**

	Actual	Budget	Variance
<b>INCOMING RESOURCES</b>			
<b>Grants</b>			
Reading Borough Council	144,504	144,504	0
PCT	35,100	35,000	100
Earley Charity	28,254	34,000	(5,746)
Colefax Charitable Trust	10,000	10,000	0
<b>Contributions from other funds</b>			
LSC for coordinator	6,692	0	6,692
Reading University	7,054	0	7,054
RAISE	1,460	0	1,460
<b>Other income</b>			
Charges and subscriptions	1,766	2,000	(234)
Donations and deeds of covenant	5,965	7,000	(1,035)
Interest and investment income	941	800	141
Net surplus from training events	0	0	0
Contribution from other projects	0	0	0
<b>TOTAL INCOMING RESOURCES</b>	<b>241,736</b>	<b>233,304</b>	<b>8,432</b>
<b>EXPENDITURE</b>			
Staff costs	184,497	183,461	(1,036)
Adverts for staff	3,992	0	(3,992)
Staff development	4,128	2,600	(1,528)
Staff & trustees expenses	2,940	3,000	60
Trustees development	0	1,200	1,200
Rent	18,000	18,000	0
Rates	1,720	1,800	80
Other property expenses	14,347	8,000	(6,347)
Insurance	2,384	2,850	466
Telephone	5,776	6,000	224
Stationery & postage	6,401	8,000	1,599
AGM expenses	1,286	1,600	314
Newsletter printing	1,820	2,640	820
Net cost of training events	639	0	(639)
Publications & information	1,571	4,000	2,429
Sundry office expenses	1,361	2,000	639
Computers & equipment	0	2,000	2,000
Examination fees	1,087	1,175	88
<b>TOTAL EXPENDITURE</b>	<b>251,949</b>	<b>248,326</b>	<b>(3,623)</b>
<b>SURPLUS (DEFICIT) FOR THE PERIOD</b>	<b>(10,213)</b>	<b>(15,022)</b>	
<b>Balance brought forward</b>	<b>10,450</b>	<b>10,450</b>	
<b>Balance carried forward</b>	<b>237</b>	<b>(4,572)</b>	