supporting, developing and representing community groups,
voluntary organisations, social enterprises and volunteering

Operational Workplan for 2017/18

Last updated: 04 April 2017

Introduction

Our operational workplan sets outs the activities we aim to undertake during the financial year, in furtherance of our strategic objectives. The workplan also sets out key performance indicators and targets for the year.

Background

Fife Voluntary Action is a Third Sector Interface and receives core funding from the Scottish Government and Fife Council to support the third sector, social enterprises, volunteering and the third sector's contribution to community planning.

This operational workplan is submitted to our core funders in advance of the financial year and it forms a key element of the monitoring and reporting framework. We are required to submit performance reports after 6 months and 12 months, typically by the end of October and by the end of April.

The operational workplan covers all of the activities of FVA. Project activity is therefore included. This improves reporting, monitoring and accountability whilst allowing for more efficient use of staff time - maximising resource allocation to service delivery.

Development of the plan

The Board and full staff team were involved in the development of the Strategic Plan. The full staff team were involved in the development of this operational workplan. Discussions were also held with Fife Council to influence and shape the plan. Stakeholder and user feedback is collected routinely throughout the year, across the staff team, and this influences our activities during the year, not just when writing the operational workplan.

We are committed to further developing our engagement around our services and activities going forward and will actively consult with a broad range of stakeholders, using a variety of methods, during 2017/18.

Accountability

The CEO is the owner of the workplan and along with the Management Team will monitor performance against the plan regularly throughout the year. The CEO will report progress to the Board on a quarterly basis, with formal reporting to core funders at least 6 monthly.

The workplan for the year (prior to performance updates) shows the targets from the previous year, highlights any new activities and also any activities which have been removed.

As part of our commitment to transparency and accountability we publish our strategic plan, operational plan and performance updates on our website and actively tell stakeholders where they can be accessed. We will also report progress and seek feedback from Fife's Third Sector Strategy Group, as part of a recent agreement to strengthen accountability and to seek constructive challenge and support for our plans.

Updates to the plan

The operational workplan is a live document and will be updated on a quarterly basis with performance information. It is also subject to change, based on environmental factors, changes in funding/income, emerging or changing priorities and so forth. Minor changes will be made within the Management Team with substantive changes requiring Board and core funder approval. To ensure transparency, performance targets will not be reduced or removed and will always be shown as they were prior to the start of the financial year.

Layout of the plan

The tabular format of the operational plan is laid out to demonstrate which activities contribute to our outcomes and strategic objectives. A few activities appear under more than one outcome area where this is appropriate and helps readers to identify the range of activities undertaken in furtherance of a particular outcome.

The 'KPI' column shows the Key Performance Indicators and numerical targets for the year under each activity.
The 'Apr-Dec 16 achievements' column shows the targets achieved during the first 9 months of the previous financial year (where the KPI is comparable).
The 'Last Year's Target' column shows the target for the whole of the previous financial year (April 2016 to March 2017).

Feedback

We would be pleased to receive feedback from any stakeholder by e-mail at info@fifevoluntaryaction.org.uk or by phone on 0800 389 6046.

Operational Workplan Summary

Key themes:		Page	Outcome areas	Activity Totals	2016/17 Totals	
	Third sector organisations in Fife are well governed, managed and deliver quality outcomes	5	3 key outcomes	29 activities	29 activities	▲
	Provide support to, and the promotion of, volunteering	9	2 key outcomes	31 activities	32 activities	▲
	Social enterprises grow in Fife	13	1 key outcome	21 activities	19 activities	▲
	Third sector organisations feel better connected and are able to influence and contribute to public policy	16	3 key outcomes	27 activities	27 activities	▲
	Fife Voluntary Action is recognised for excellence	20	4 key outcomes	37 activities	37 activities	▲
TOTALS	**5 key themes**		**13 key outcomes**	**145 activities**	**144 activities**	▲

fife voluntary **action**

1. **Third Sector organisations in Fife are well governed, managed and deliver quality outcomes**					
Outcomes	Activities		KPIs	Apr – Dec '16 achievements	Last year's targets
1.1 Third sector organisations are successful and resilient - complying with legislation, demonstrating good governance and have skilled and informed staff and volunteers	1.1.1	Engage with appropriate key people in partner agencies and local third sector organisations to promote and develop the role and services of FVA	**250** meetings **50** events **5** consultations **4** surveys **90** e-mail bulletins **400** tweets **1,000** website/bulletin articles **40** FVA news items	254 50 8 1	180 35 4 2
	1.1.2	Provide support to a range of organisations on: good governance, statutory compliance, business planning, constitutions, recruitment of staff, recruitment of volunteers, financial management, policy development etc.	**12,000** enquiries **20** case studies **650** organisations **50** policies developed **30** start-ups **250** vacancies promoted **15** charities registered **5** development plans **5** community engagement consultations **5** staff recruitment cases	13,579 10 470	12,000 20 650
	1.1.3	Provide extensive one-to-one support to organisations in need of help or through crisis	**30** organisations	19	40
	1.1.4	Provide support to organisations in their recruitment of board members	**2** events **30** organisations **2** training sessions **1** website section **12** reviews supported	0 27 0 8	2 30 1 12
	1.1.5	Promote, deliver and evaluate a range of appropriate training opportunities through consultation and needs analysis	**1** training needs analysis **50** training sessions **520** participants **350** evaluations **12** training e-mail bulletins **150** training/learning website items	0 24 241 13	1 50 520 12

	1.1.6	Create, develop and publish a range of communications to inform the third sector in Fife through a variety of mediums, including policy briefings, newsletters, networks, website, social media, press etc.	**90** e-mail bulletins **400** tweets **30** press articles **20** briefings **10** publications **1,000** website/bulletin articles **100** presentations **40** FVA news items	49 296 12 17	90 1,500 30 6
	1.1.7	Produce information briefings on, and for, the local sector, on thematic topics such as welfare reform, services for children, older people etc.	**15** briefings	10	15
	1.1.8	Develop a directory of third sector organisations, with core date fields completed in the Milo database	**3,000** organisations	2,777	3,000
	1.1.9	Review and maintain all FVA media communications to promote good practice, current news, events and opportunities for the sector	**20** case studies **30** press articles **25** new website pages **50** updated website pages **100,000** visits	6 21 87,929	25 50 100,000
	1.1.10	Organisations are supported to improve their awareness and practice on equality and diversity	**1** briefing **10** website/bulletin articles		
	1.1.11	Support organisations in response to any concerns raised through SLA monitoring	**20** organisations	14	5
	1.1.12	Develop a range of governance checklist products to promote best practice	**1** toolkit **1** website section **3** leaflets **20** completed health checks		
1.2 Better partnership working	1.2.1	Research needs through consultations, surveys etc., to raise awareness with appropriate partners and stakeholders	**3** consultations **3** surveys **3** research projects	3 3 1	3 3 3
	1.2.2	Review and maintain website to include sections on partnership working, community planning and networks	**25** new website pages **50** updated website pages	1 21	25 50

through improved communication with a wide range of stakeholders	1.2.3	Promote collaboration and support opportunities to collaborate	**20** meetings **1** case study **2** briefings **3** new projects	17 1 6	3 1 2
	1.2.4	Develop thematic policy framework documents showing national and local policy and context	**3** frameworks	1	3
	1.2.5	Increase the profile of the third sector with partner agencies and within communities	**30** events **400** tweets **10** press articles **2** publications **40** website/bulletin articles	32 16 2	15 10 2
	1.2.6	Organise a variety of networking events and information sessions, forums, surgeries etc.	**20** forum meetings/events	10	20
	1.2.7	Support public sector partners to support the role of link officers	**8** meetings **1** training session **1** publication	8 1 0	2 1 1
	1.2.8	Support and provide, in partnership, a Creative Breaks Time to Live grants programme for unpaid carers in Fife	**75** grant applications **60** grant awards **30** grant evaluations	89 87 0	75 60 30
	1.2.9	Find ways of reaching organisations that don't engage with us with a view to promoting best practice in governance and compliance	**20** organisations **15** evaluations	10 0	20 15
1.3 Organisations are financially robust	1.3.1	Provide shared office and meeting space in third sector hubs	**4** hubs **25** tenants **2,500** room hires	4 21 2,114	4 29 1,200
	1.3.2	Host funding events/surgeries locally, fundraising sessions and form filling workshops	**40** meetings **2** events	13 1	20 2
	1.3.3	Provide information on a range of funding/tendering opportunities	**52** e-mail bulletins **150** website/bulletin articles	26 80	52 100
	1.3.4	Organisations are helped in identifying appropriate sources of funding	**80** organisations **90** funding applications	47 50	80 60
	1.3.5	Organisations have access to an affordable, high quality Independent Examination and payroll service	**25** evaluations **45** payroll clients	0 41	25 49

			60 IE clients **6** book-keeping clients	27 5	60 5
	1.3.6	Provide financial governance support to organisations	**15** organisations **4** training sessions **2** publications	8 3 1	20 6 2
	1.3.7	Deliver training sessions for Treasurers	**4** training sessions **18** participants	5 5	4 18
	1.3.8	Develop and host a large scale funders event	**150** participants **12** funders	160 11	150 10

2. Providing support to, and the promotion of, volunteering					
Outcomes	Activities		KPIs	Apr – Dec '16 achievements	Last year's targets
2.1 More people in Fife benefit from volunteering	2.1.1	Develop marketing strategy, information leaflets etc. to encourage people to volunteer and promote the benefits of volunteering activity and raise awareness of opportunities through e-mail bulletins, local press releases, website, posters, etc.	**20** e-mail bulletins **100** tweets **8** press articles **6** publications **15** website/bulletin articles	8 8 3	20 15 5
	2.1.2	Provide an introduction to volunteering presentation for potential volunteers and offer presentations to staff teams within organisations/businesses and support local Job Clubs, IT drop-ins and welfare reform hubs	**700** participants **100** presentations **20** informal drop-in sessions	46 360 24	700 100 20
	2.1.3	Support volunteers with higher support needs into volunteering by providing tailored one-to-one solutions	**20** clients	48	20
	2.1.4	Operate appropriate procedures to match volunteers with opportunities and support individuals to take up placement opportunities	**800** volunteers **2,000** matches **1,000** placements	452 1,016 547	800 2,000 1,000
	2.1.5	Develop a project proposal to involve ex-offenders and seek funding for a pilot	**60** clients	25	60
	2.1.6	Young people are assisted to volunteer and matched with suitable placements	**1,000** certificates **200** clients	468 124	1,000 200
	2.1.7	Promote volunteering to older people and/or those due to retire or recently retired	**15** participants **2** presentations	4 1	 2
	2.1.8	Track and evaluate volunteer experiences to identify progression, e.g. health, confidence, employability etc.	**300** evaluations **800** volunteers	373 452	300 800
	2.1.9	Promote Volunteers Week and develop a range of activities	**10** events **20** tweets **4** press articles **4** website/bulletin articles	12 4	10 4
	2.1.10	Recognise and reward volunteering by hosting a Volunteer Awards Ceremony	**15** tweets **3** press articles	3	5

			230 participants **170** evaluations **15** awards	270 16	250 14
	2.1.11	Promote Saltire Awards and the benefits of being involved in Youth Volunteering (12-25 years old), encourage participation to achieve Challenge (127) Approach (100) Assent(770) and Summit Awards (3)	**50** organisations **1,000** certificates **18** schools	55 468 18	50 1,000 18
	2.1.12	Encourage people to volunteer by developing and supporting the organisation of team challenges	**7** case studies **10** team opportunities **7** team challenges	4 4 5	7 10 7
	2.1.13	We support local employers, across sectors, and of varying sizes, to promote and support volunteering within their workforce (employer supported volunteering)	**4** case studies **6** organisations **40** volunteers	0 3 25	4 6 40
	2.1.14	Support NHS Fife to build on Investing in Volunteers, working closely with their volunteer champion and volunteer co-ordinators to support and evaluate progress	**5** meetings **5** case studies	4 1	5
	2.1.15	Deliver Kingdom Companions befriending service	**10** case studies **2** press articles **20** evaluations **50** volunteers **40** matches	9 43 80	12 100 23
	2.1.16	Promote the pledge system and volunteering as part of Fairer Fife Action Plan	**3** meetings **3** case studies **25** tweets **10** website/bulletin articles **150** referrals		
	2.1.17	Young people (16-19) at risk of not achieving a positive destination are given tailored support to volunteer and recognise their achievements	**45** placements **55** young people	46 55	35 50
	2.1.18	Deliver Footcare Fife service – recruiting, training and supporting volunteers to deliver a high quality, safe service	**6** case studies **2** press articles **3** training sessions **4** website/bulletin articles	0 3	6 3

			1 new website page **1** website section **25** volunteers **3,000** clients **5,000** appointments **12** venues	18 1,432 14	25 2,500 6
	2.1.19	Develop a project proposal to pilot a Timebank	**5** meetings **1** funding application **1** development plan	4	
2.2 Volunteering is safe and rewarding through inclusive, meaningful opportunities	2.2.1	Provide support to organisation on volunteering issues and assist with the development, including relevant policies recruiting and managing volunteers, supervision of volunteering roles, etc.	**240** organisations	216	220
	2.2.2	Support organisations to achieve Volunteer Friendly Award	**12** meetings **15** organisations **10** awards	3 9 5	12 15 10
	2.2.3	Work closely with DWP and other partners to make volunteering accessible to those seeking work and receiving benefits	**5** meetings **4** press articles **4** training sessions **1** publication	7 1 1 1	5 4 4 1
	2.2.4	Support volunteer involving organisations by providing relevant information, signposting for PVG/Disclosure related purposes	**50** organisations **1** briefing **3** website/bulletin articles	38 2 3	50 1 3
	2.2.5	Deliver a range of training programmes on volunteer management topics to organisations involving volunteers	**15** training sessions **150** participants	6 75	15 150
	2.2.6	Work with potential referrers and participate in partnerships, e.g. working with Local Planning Groups, Welfare Reform partnerships and other locality groups	**60** meetings	50	60
	2.2.7	Information held on the database is regularly monitored, reviewed and amended where required	**200** updated opportunities		
	2.2.8	Monitor and evaluate volunteer experiences to establish what benefits have been achieved	**15** case studies **330** evaluations	8 273	20 300

	2.2.9	Facilitate volunteer manager's forum to share good practice, promote networking and engage with key stakeholders	**12** e-mail bulletins **4** forum meetings/events	5 3	12 4
	2.2.10	Develop new types of opportunity to match unmet demand, especially in response to welfare reform hub developments and other policy developments	**15** new opportunities	9	15
	2.2.11	Promote FVA's volunteering support and development role with partner agencies, potential referrers and other interested groups	**150** participants **22** presentations	137 21	85 20
	2.2.12	Promote volunteering as a route to employment as part of Fife's third sector employment consortium – main focus will be on areas of greatest deprivation and those facing multiple barriers to employment	**10** presentations **40** informal drop-in sessions **80** placements **100** clients **20** job outcomes **40** referrals	4 36 71 66 34	10 40 80 100 20

3. Social enterprises grow in Fife

Outcomes	Activities		KPIs	Apr – Dec '16 achievements	Last year's targets
3.1 Organisations are supported to be more enterprising, resulting in increased income generation and greater social benefit across Fife	3.1.1	Develop joint awareness raising events and promote social enterprise in partnership with Fife Social Economy Partnership	**4** meetings **2** events **2** training sessions **2** publications **1** website section	2 1 0 0	4 2 2 1
	3.1.2	Maximise local benefit from Just Enterprise programme and other national offerings by bringing events to Fife, making appropriate referrals and joint working	**2** meetings **4** events	0 2	2 4
	3.1.3	Produce good practice information literature and ensure social enterprises know about FVA and our FSEP partners and the services we provide	**1** toolkit **4** publications	0 2	1 4
	3.1.4	Raise awareness of a socially enterprising third sector with partners – promote opportunities, successes and raise awareness of needs including ways of engaging and commissioning with third sector providers and potential providers	**4** meetings **2** case studies **10** website/bulletin articles	6	
	3.1.5	Provide existing capacity building support to social enterprises	**20** organisations	17	15
	3.1.6	Support existing organisations to be more socially enterprising	**4** events **10** organisations **2** publications	7 0	4 2
	3.1.7	Support new start-up social enterprises	**15** start-ups	11	20
	3.1.8	Support collaborations or mergers where the purpose is to tender for a contract	**2** meetings **1** event **2** new projects	0 2	2 2
	3.1.9	Ensure organisations have access to specialist business support services and information where FVA is not best placed to support them	**5** referrals	5	5
	3.1.10	Engage with, provide secretariat support and promote the work of the Fife Social Enterprise Network, including influencing and engaging in order to promote social enterprise interests	**2** publications **6** website/bulletin articles **4** forum meetings/events	0 2	2 4

3.1.11	Promote social enterprise successes locally	**10** tweets **5** press articles **2** briefings **2** publications **10** website/bulletin articles **2** updated website pages **4** FVA news items	1 12	2 12
3.1.12	Engage with communities and organisations to explore right to buy, asset transfers and other community ownership opportunities	**12** meetings **2** events **10** consultations **6** case studies	10 3 11 5	12 2 10 6
3.1.13	Engage with private sector organisations to promote trading opportunities	**3** meetings **2** events	3 2	2 2
3.1.14	Socially enterprising organisations are aware of, and contribute to, Fife's Town Centre Action Plans and Locality Planning	**5** contributions to plans	5	7
3.1.15	Develop trading area on our website for organisations to promote services and products	**1** website section **50** strategies/plans	0 3	1 50
3.1.16	Play a key role in Fife Social Economy Partnership	**4** meetings **1** event		
3.1.17	Work with public sector partners to promote and support community empowerment, including asset transfers	**5** meetings **1** strategies/plan **5** community engagement consultations	5	5
3.1.18	Support organisations with leases and asset ownership and management	**20** organisations **1** toolkit		
3.1.19	Provide dedicated capacity building and business development support to Fife's credit unions	**25** meetings **20** tweets **3** press articles **3** briefings **5** publications **12** website/bulletin articles **1** website section **5** presentations	3	5

	3.1.20	Promote credit unions and support growth in membership within third sector, communities and businesses	**10** meetings **50** tweets **3** press articles **3** posters **2** leaflets		
	3.1.21	Support the new CDFI and develop links to credit unions to benefit local citizens	**3** meetings	1	3

4. Third sector organisations feel better connected and are able to influence and contribute to public policy					
Outcomes	Activities		KPIs	Apr – Dec '16 achievements	Last year's targets
4.1 Fife third sector is supported to have a strong voice and their contribution is recognised and valued by the CPP	4.1.1	Attend and actively participate at relevant Fife Community Planning Partnership (CPP) meetings	**300** meetings	245	300
	4.1.2	Develop and maintain an appropriate communication plan, including a Community Planning section on FVA website and strong social media presence	**7** briefings **2** updated website pages **1** leaflet **8** FVA news items	1 1 7	0 0 1
	4.1.3	Facilitate and support voluntary sector forums: health and social care, children's services, mental health, Fife Third Sector Strategy Group and employability	**1** event **1** updated website page **30** forum meetings/events	2 21	30
	4.1.4	Fife third sector representatives secure places on local forums and partnerships and are supported by FVA in their role	**10** meetings	14	
	4.1.5	The sector has opportunities to contribute to consultations and policy development and FVA informs the sector about relevant consultations, survey monkeys and policy developments in a timely manner	**15** website/bulletin articles **15** consultations promoted **5** consultations supported	15 5	11 8
	4.1.6	Produce briefing report for community planning partners and publish on our website	**1** briefing	0	1
	4.1.7	Facilitate opportunities for CPP partners to gain better understanding of the TSI and the sector	**6** briefings **2** presentations	2 2	6 2
	4.1.8	Facilitate strong third sector involvement in local community planning in all 7 areas within Fife	**25** meetings	18	18
	4.1.9	Jointly deliver Third Sector Community Planning events with focus on local community planning	**3** events	4	3

	4.1.10	Develop and promote a programme of events relevant to the sector including training, open days, conferences, forum meeting dates etc.	**40** training sessions **650** website/bulletin articles **1** website section **50** forum meetings/events **10** FVA news items	750	504
	4.1.11	Local people are more aware of voluntary sector contribution through regular features in the local press and radio station about successes	**15** press articles	16	10
	4.1.12	Develop communication strategy to build the profile and create an open access approach	**1** strategies/plan	1	1
4.2 The third sector is fully involved in the delivery of high quality public services	4.2.1	Lead on ensuring that the third sector is recognised as a credible and valued partner locally	**4** case studies **4** publications	4 3	4 4
	4.2.2	Engagement in, and support for, the Third Sector Strategy Group to facilitate implementation of a variety of thematic policies	**2** events **10** website/bulletin articles **1** website section **10** forum meetings/events	1 1	2 12
	4.2.3	Promote and maximise third sector contribution to key policy areas such as poverty, children's services, mental health, housing, self-directed support etc.	**20** meetings **4** briefings	12 3	20 3
	4.2.4	Co-ordinate and support Community Capacity Building and third sector activity within the Integrated Care Fund	**12** meetings **2** publications	18 3	11 2
	4.2.5	Support public sector partners in their review of third sector service provision with a view to improving service delivery and securing further investment in third sector public service provision	**2** reviews supported	3	2

	Ref	Description	Target		
	4.2.6	Support public sector partners to review potential issues with funded activity to ensure any organisation experiencing difficulties receives timely and appropriate support	**12** referrals	13	
	4.2.7	Provide FVA performance reports to Fife's Third Sector Strategy Group and seek feedback and challenge	**2** publications	1	2
	4.2.8	Promote Fife CPP's Prevention Framework within the third sector	**1** event **2** publications	2 1	1 2
	4.2.9	Promote the content, values and ambitions of the Fairness Matters report and recommendations within the third sector	**2** events **12** tweets **2** publications **6** website/bulletin articles		
	4.2.10	Contribute to, and support the implementation of, the Fife Single Outcome Agreement/LOIP	**4** meetings **2** contributions to plans		
	4.2.11	Lead on the three third-sector led recommendations in Fairness Matters	**6** meetings **3** contributions to plans		
	4.2.12	Maximise the third sector's contribution to joint resourcing, prevention and early intervention	**6** meetings **1** publication **3** forum meetings/events	6	
4.3 Public sector partners are more effective through third sector support	4.3.1	CPP partners are supported to improve their awareness and practice on equality and diversity	**6** meetings **6** consultations **6** training sessions **1** publication	3 7 8 4	6 6 6 2
	4.3.2	Support health and social care (H&SC) integration	**18** meetings **4** events **21** website/bulletin articles	31 3 39 13	18 4 32 10

and challenge				**10** forum meetings/events		
	4.3.3	Contribute to the work of the Fairer Fife Commission in partnership with Fife's Third Sector Strategy Group to promote the sector's role and contribution to alleviating poverty		**10** meetings **20** tweets **4** press articles **2** publications **12** website/bulletin articles	3 6 4	2 2

5. We are recognised for excellence

Outcomes	Activities		KPIs	Apr – Dec '16 achievements	Last year's targets
5.1 Our people are more skilled and are supported to deliver high quality services	5.1.1	Hold regular staff meetings	**10** meetings	6	10
	5.1.2	Support HR Sub-Committee to lead on staffing matters and review progress	**6** meetings	4	6
	5.1.3	Adopt Healthy Working Lives	**8** events **1** development plan		
	5.1.4	Review skills matrix and staff structure to ensure we can deliver against our plans, implementing training where required	**2** publications	0	2
	5.1.5	Operate effective and consistent support and supervision system with annual performance appraisals	**180** meetings		180
	5.1.6	Review health and safety policy, staff handbook and terms and conditions of service	**1** consultation **1** publication **12** policies developed	1 1 6	
	5.1.7	Build on Volunteer Friendly (VF) Award – seek continuous improvement	**4** events **4** forum meetings/events **1** strategies/plan	1 2	4 4
	5.1.8	We review our development plans for staff, volunteers and Board members	**1** consultation **20** training sessions **1** publication **20** evaluations		
	5.1.9	Review Board make-up and seek to recruit new Directors to fill any identified gaps	**2** training sessions **6** applications	1 3	2
	5.1.10	Hold Board of Directors meetings regularly as well as relevant Sub Group meetings	**6** meetings **6** HR meetings **10** finance meetings	4 4 9	6 6 10
	5.1.11	Develop and implement a system for reviewing Board performance	**1** publication	0	1
	5.1.12	Review premises and develop proposals to maximise benefit from our offices and facilities	**2** publications	4	2

	5.1.13	Review our approaches to equality and diversity in recruitment, training and support to ensure we operate to best practice	**1** publication **1** policies developed		
	5.1.14	Develop and deliver an ICT strategy for each building	**4** publications	1	5
	5.1.15	Develop and implement an internal communications strategy and plan	**1** evaluation **1** strategies/plan		
	5.1.16	Recognise our volunteers, train them, support them and involve them	**2** events **2** training sessions **1** evaluation		
5.2 We can demonstrate the difference we make	5.2.1	Maintain and review evaluation system to focus on outcomes and end-user experiences	**50** case studies **400** evaluations		
	5.2.2	Develop customer relationship management procedures for responding to, and managing, enquiries/requests for information, help, complaints, compliments etc.	**350** helpdesk tickets **280** tickets closed within 3 days	314 202	100 80
	5.2.3	Plan to achieve EFQM Committed to Excellence Award	**4** meetings **1** training session **1** publication		
	5.2.4	Produce and publish case studies showing impact on clients	**50** case studies	17	35
	5.2.5	Collect feedback from clients, respond accordingly and produce summary report with improvement actions	**1** survey **1** publication **100** returns	0	100
	5.2.6	Implement and review communications strategy and plan to promote our brand, values, services and successes	**1** strategies/plan		
	5.2.7	MILO database used to support workplan	**4** meetings		
	5.2.8	Publish an annual report on performance	**1** publication		
5.3 Our services are better because we learn from others	5.3.1	Attend relevant TSI network meetings	**8** meetings	8	
	5.3.2	Attend national Social Enterprise networking and learning events	**6** meetings	3	6
	5.3.3	Attend and contribute to national volunteering practice forums	**4** meetings	4	
	5.3.4	Attend national health and social integration practitioner's networks	**6** meetings	3	
	5.3.5	Attend appropriate networking events	**140** events	131	90
	5.3.6	Attend conferences and training/learning sessions	**50** events	42	25

5.4 We seek to improve our financial stability	5.4.1	Develop new project proposals which meet with our objectives and local need	**5** new projects	7	5
	5.4.2	Research possible sources of funding	**5** funding applications **1** strategies/plan	5	5
	5.4.3	Generate income from meeting room hire, desk hire, office space hire and tenant services	**25** tenants **2,500** room hires	25 2,114	20 1,200
	5.4.4	Review financial procedures manual	**1** policies developed		
	5.4.5	Hold regular Finance Sub Committee meetings and provide up to date, accurate reports on financial performance and financial risk management	**10** finance meetings	9	10
	5.4.6	Hold monthly internal financial management meetings to review all aspects of financial performance	**12** meetings	10	12
	5.4.7	Maintain project budgeting and review system	**10** publications **1** strategies/plan		