

Find a Solution
West of Scotland Regional Equality Council (WSREC)
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West of Scotland Regional Equality Council

Supported and funded by





1. Executive Summary

This research project has been conducted with the aim of finding solutions for income generation within the West of Scotland Regional Equality Council (WSREC). An internal resource assessment identified limited staff time and a lack of funds within the organisation. This provided our basis for creating innovative solutions. A combination of the findings from the internal resource assessment, strategic tools and market analysis led us to identify eight potential income generating ideas including:

- ✿ Children's Summer Programme
- ✿ Training
- ✿ Friends of WSREC
- ✿ Historical Site Visits
- ✿ ID Cards
- ✿ Interpretation Services
- ✿ Selling Goods
- ✿ Eco-Friendly Craft Workshops

These income generating activities possess varied levels of risk with differing potential returns. In addition, we conducted research on the possibility of WSREC creating a social enterprise. The social enterprise would take the form of a charity shop providing employment opportunities for ethnic minority individuals. We hope that with the research we have conducted WSREC will be able to generate income to achieve sustainability and self-sufficiency.



2. Abstract

This report is the outcome of an eight-week research project conducted by two University of Glasgow students for the West of Scotland Regional Equality Council (WSREC). The project was funded by the Glasgow University (GU) Settlement as part of their annual Find a Solution initiative. The aim of the research was to identify potential income generating activities to enable the sustainability and self-sufficiency of WSREC.

3. Acknowledgements

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INTRODUCTION



4.1 University of Glasgow Settlement

The University of Glasgow Settlement has facilitated twenty-two 'Find a Solution' placements since 2008. Each year, the Settlement recruits pairs of students to work alongside various third sector organisations and provide solutions to identified problems. The students produce a written report of the work and present their findings to an invited audience at the University of Glasgow in September.

4.2 West of Scotland Regional Equality Council (WSREC)

The West of Scotland Regional Equality Council (WSREC) is dedicated to promoting a society free of discrimination, inequality and exclusion. The organisation was created in 1971 with a specific focus on eradicating all forms of racial discrimination in accordance with Race Relations Act 1976. The organisation expanded its reach in response to the Equality Act 2010 and committed its efforts towards working with age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation.

The organisational aims of WSREC are clear and confident. They are devoted to eliminating discrimination, in all its forms, across the West of Scotland. A firm belief in reducing inequality and promoting a culture of human rights coincides with the desire to encourage strong community relations between all people of all communities. WSREC has also identified the importance of providing training as a tool for eliminating discrimination.

These long-term aims are achieved by providing equality services, information and signposting to victims of discrimination, working in partnership across all sectors and communities, identifying gaps for equality groups within the public sector and creating projects with the resources to tackle inequality and discrimination.

The organisation is based in the West end of Glasgow and employs 25-30 full-time, part-time or sessional staff and hosts around 20 volunteers. The former school building that WSREC calls home is also a hate crime Third Party Reporting Centre in partnership with Police Scotland. The community garden developed by the Lets Cook, Grow & Sew Together project is another example of how the physical space has been developed to help achieve the organisations aims.



Current projects:

3CH- Aims to challenge prejudice by focusing on the impact of hate beliefs and behaviours and bringing disparate communities together.

EMbrace- Empowers and enables young people from the migrant Roma communities in Glasgow from Central and Eastern Europe to be more confident, enterprising and healthy by running a programme of arts and health based activities.

Good Community Relations Project (GCRP) – GCRP Hate Crime delivers media campaigns and awareness sessions to encourage third party reporting, and supports victims of hate crime and discrimination.

Let's Cook, Grow & Sew Together – Engaging people from diverse communities in challenging climate change and reducing carbon emissions. Offers behaviour changing tools such as: growing in the community garden, foraging, low carbon food workshops, furniture refurbishing, eco driving, swap shops, sewing lessons and zero waste awareness sessions.

Living Equality – Supports diverse communities and community organisations to positively advance the Public Sector Equality Duty (PSED) across West of Scotland within the public sector.

Minority Ethnic Employment & Training Support (MEETS) - Supports individuals from minority ethnic backgrounds, in particular, those who face substantial barriers, to increase their skills and confidence in entering employment or further education. This is achieved through a range of accessible training and one to one support activities.

Minority Ethnic Silver Surfers (MESS) – The project aims to help minority ethnic older people in Glasgow to feel less isolated and to use technology in a way to help them live a more independent life.

Qurbani Food Initiative - Provides an opportunity for the Muslim community to fulfil its Qurbani obligation of dispersing one third of their meat to the poor and needy.

Roots Scotland – Increases knowledge, appreciation and enjoyment of the historic environment by minority ethnic communities in Scotland.



4.3 Challenges to Third Sector Funding

Charities have lost more than £3.8bn in grants from government over the last decade and, at the continued rate of decline, there will be no government grant money for charities by the next general election (Allcock Tyler, 2016). In the UK, 40% of charities that were dependent on government funding have had to cut services and across the sector new funding sources are the major issue for 71% of respondents (Consultancy.uk, 2016).

The size of the sector and the social significance of non-profit organisations highlight the importance of the inclusion of non-profit issues in management theory. Peter Drucker argued that forty years ago, 'management' was a negative word in non-profit organisations. It meant 'business' to them, and the one thing they were not was a business. However, specialised knowledge of management is increasingly critical today. Existing management concepts, tools and methods have been developed and adapted in an attempt to make them relevant for the third sector. Strategic management is useful in non-profit organisations identifying strengths and weaknesses. This may increase non-profit organisations credibility, which will strengthen their financial and human resource base (Domanski, 2011).

In an effective system, innovative non-profits with the best management and social change agendas would grow in scale and scope while less effective and efficient ones would diminish and eventually disappear. A study found that mechanisms for directing funds to non-profit organisations are much less developed. Donors and foundations cannot secure reliable or consistent data to compare the performance of non-profits and surveys of non-profit executives indicate that they spend more than half of their time raising money and focus little on short-term financial performance. As a result, they fail to build capabilities in strategy, leadership, fundraising, performance measurement and organisational development (Kaplan and Grossman, 2010).

4.4 Challenges to WSREC Funding

One of the greatest challenges WSREC faces is the ability to secure the future of the organisation. Funding remains problematic despite aims to increase organisational enterprise activities in their five year business plan and receiving income of £582,674 during the 2015-2016 financial year (WSREC, 2016). Funding organisations that support WSREC services do



not account for full cost recovery during project delivery. Funders may not allow for more than 10% of the amount granted to be used for overheads and line management, forcing WSREC to spend core funds and decrease their reserves.

The organisation is fully aware of the assessments and research that could begin to resolve the funding issue. However, there is no staff member with the additional time to undertake the project, hence their application for Find a Solution. The challenges to WSREC funding endangers the self-sufficiency and sustainability of the organisation.



4.5 Research Objectives

- ✿ Integrate with the organisations interest in a values based economy, equality issues and socially conscious business development
- ✿ Identify key skills and abilities through an internal resource assessment
- ✿ Identify essential organisational development
- ✿ Identify realistic enterprise activity
- ✿ Provide additional marketing/research-based insight and recommendations
- ✿ Contribute to the organisational development of and identify the path to increasing WSRECs sustainability and self-sufficiency



Weeks 1 & 2
Internal Resource Assesment



Weeks 3 & 4
Stategic Analysis



Weeks 5 & 6
Strategy Exploration
Interacting with experts



Weeks 7 & 8
Strategy Exploration Continued
Report Writing/Presentation Preperation
Handover to WSREC



INTERNAL RESOURCE ASSESSMENT



We began our research project by coordinating an internal resource assessment. This was conducted to gain a deeper insight into current income generation within WSREC and ideas from staff regarding future income generation.

5.1 Core Staff Interviews

We conducted interviews with sixteen members of core staff to assess the resources available, as well as the opinions of WSREC stakeholders regarding income-generating activities (IGAs). Sixteen members of core staff were interviewed between 05/07/16 and 12/07/16. The interviews were conducted in WSREC offices and took the structure of informal discussions based around a set of questions that were, by majority, open-ended (Appendix A). An informal discussion was used to allow the staff to discuss their personal opinions as well as give specific details.

5.2 Findings

When asked to identify possible IGAs within WSRECs projects, participants adopted a positive approach and were able to provide a variety of ideas. Although there were a notable number of suggestions made, there were a number of common concerns voiced. Firstly, due to funding regulations of the individual projects, the staff are salaried from within allocated project funds and their work is committed to specific goals, activities and outcomes. This means that they cannot begin unrelated work such as income generation for WSREC within that salary. Another concern that aired during this section of the interviews was that generating spare income does not align with WSRECs free, inclusive and accessible provision of services to minority communities. IGAs within individual projects would also have initial costs such as additional training for staff and start up investment.

Participants were then asked to identify possible IGAs that the organisation as a whole could undertake. There was a notable amount of reference made to the expertise and skills already existing within the organisation. Another, less positive, notable common reference was made to the additional human resources, funding and time commitment necessary for IGAs to be planned, implemented and sustained. The IGAs identified were:

- ✿ Deliver sewing, gardening and recycling skills training in the form of Eco-Friendly Craft workshops



- ✿ Deliver/repackage training related to WSREC expertise
- ✿ Deliver a children's summer programme
- ✿ Provide interpretation services
- ✿ Deliver art and historical workshops/site visits with language specific guided tours
- ✿ 'Friend of WSREC' membership scheme
- ✿ Design and produce staff ID cards for sale
- ✿ Charity shop outlet

Of the sixteen staff interviewed, ten could not identify an IGA that had occurred in WSREC. One member of WSREC staff explained that instead of generating its own income, the organisation relies heavily on funding. Another member of staff believed that income generation within WSREC required full-time commitment and could not succeed as a side project. It is apparent that income generation is not a consistent strategy of the organisation.

Participants were asked to discuss what they believed the main benefits that a sustainable IGA would bring to WSREC. Nine of the sixteen participants gave job security and the ability to retain staff and skills as a key benefit. Participants explained that staff are employed within their project and are unemployed when the project funding ends. This has previously led staff to lose focus in the last few months of a project, as they are concerned with securing work for the future. Income generation would create a buffer zone that could allow core staff to work sessional hours until new project funding is secured. This reduction in staff stress would improve the quality of their work.

Another key benefit identified was the prospect of becoming more self-sufficient and decreasing reliance on funders. This would allow the values of WSREC, rather than the funder, to drive its agenda and allow WSREC to offer more services in response to current events, new demands and changing social environments. Being able to provide a greater number of tailored services would aid WSREC's long-term goals of developing society in discrimination free and inclusive ways.

5.3 Limitations

The interviews were recorded by one of us while the other asked questions. The written recordings of participant's answers may have been written in shorthand to keep up with the



sometimes fast pace of dialogue. A solution to this may have been to circulate the questionnaire via email and ask for electronic responses. Participants sometimes took a different meaning from the questions and this prompted us to clarify some terms and questions that may have promoted a bias response from participants.

5.4 Senior Management Interviews

We sent the Deputy Director of WSREC, a set of questions to which she electronically responded (Appendix B). When asked what the financial challenges facing WSREC were and why they needed additional surplus income she replied:

“An increase in project delivery has meant more resources are being used from core funds i.e. telephone, internet, postage, payroll etc. Funders do not always support 100% full cost recovery and this can have an impact on the organisations finances. In recent years, any reserves that we have are being used for events such as away days, audits and annual reports. Our management structure pay is not fully supported by a particular fund although GCC funding does support part salaries. We need to make up staff salaries from management costs allocated to projects and again this is an area of concern as we need to ensure that we maintain the income through grant generation to a level which is sufficient to cover staff salaries. The impact of this not happening would be management would need to cut working hours and the management structure would therefore be affected by less resources available to support all WSREC staff.” (Khan, 2016)

In regards to the costs involved in creating an income generating activity or social enterprise the deputy director stated that:

“There is a very limited budget at the moment. WSREC staff are raising funds through a charity fundraiser in September and some resources could be made available through this. Alternatively we could look into start up costs through funding opportunities.” (Khan, 2016)

As the deputy director discussed, the organisational fundraiser being piloted in September 2016 could create some funds for initial costs, however she did state a preference for low



risk solutions with maximum effectiveness. Deputy director identified a number of potential IGAs:

“We have a number of projects like Cook Grow and Sew and 3CH which deliver goods through products and training. There has been talk about opening a charity shop which would support social enterprise activities through volunteer development and retail experience for minority ethnic communities. We have a garden which is beginning to grow sustainable foods and we have experts within many crafts that could be utilised for income generation.” (Khan, 2016)

It was apparent from the interviews that WSRECs staff are limited for time, with the majority tied to projects. WSREC appears to have strong enough internal systems for a new effort. However, WSREC does not appear to have a sufficient cash flow to risk on new projects.



STRATEGIC ANALYSIS

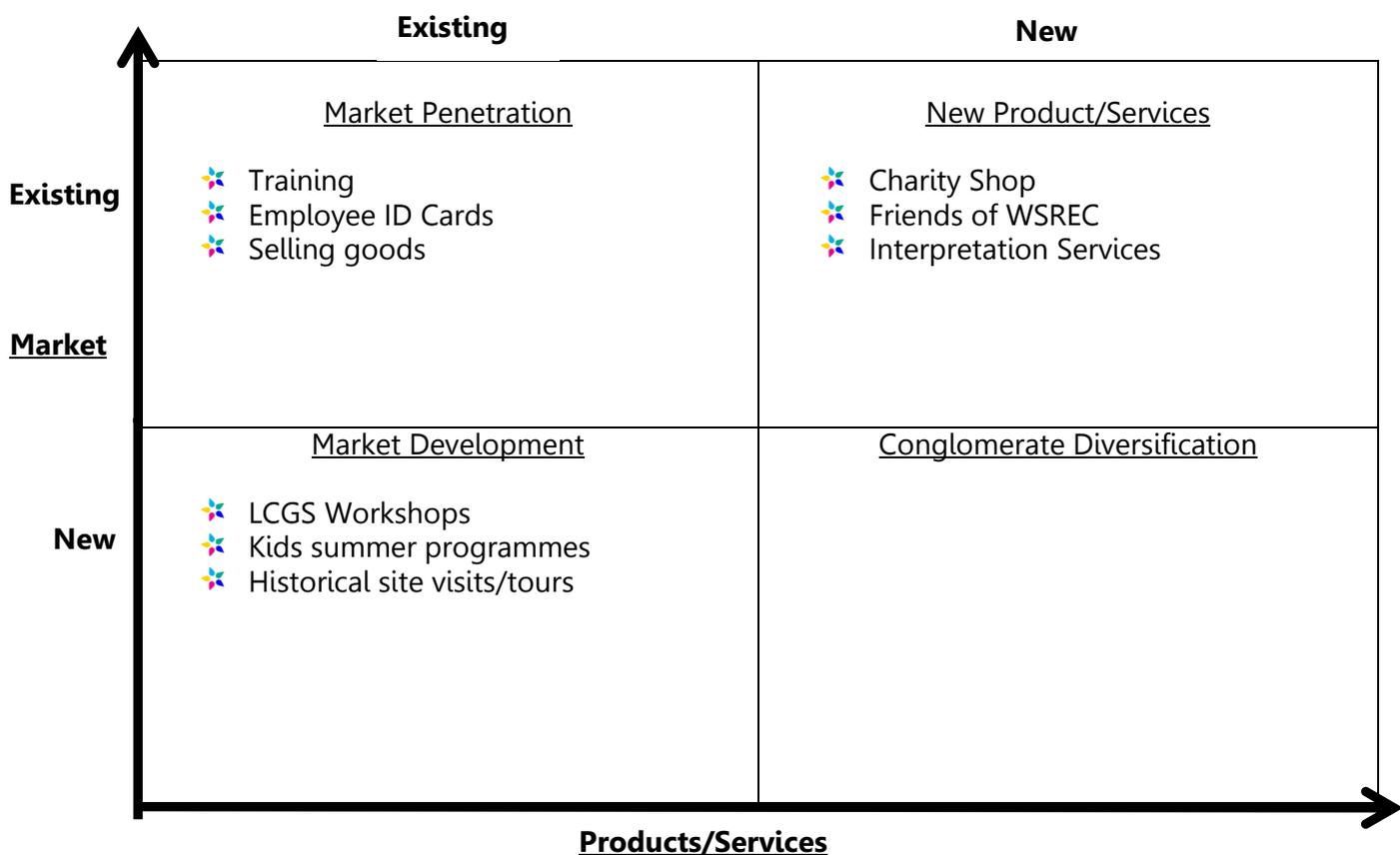


We chose to undertake strategic analysis on the potential income generating activities available to WSREC in order to ensure that we provide reliable solutions and to give the organisation an insight into the business tools that are often not utilities by third sector organisations.

6.1 Ansoff Matrix

The IGAs that were identified by both WSREC core staff and senior management have been plotted onto an Ansoff Matrix that categorises them into suitable product and market growth strategy areas (Figure 1). The Ansoff Matrix is a strategy tool that illustrates four different directions for growth (Johnson et al. 2013). An organisation usually adheres to market penetration strategies but can decide to develop their products/services in a new market or create new products/services for an existing market. These strategic decisions are known as related diversification.

Figure 1





WSREC has three possible IGAs that require market penetration strategies and three that would benefit from market development strategies. There are three IGAs that require growth of new services in existing markets. The strategies identified in this matrix will be referred to during the assesment of individual IGAs.

6.2 Risk Matrix

The Risk Matrix (Appendix C) reveals the distribution of risk across an organisations innovation portfolio. An IGA is positioned on the matrix listed below (Figure 2) based on its score on a range of factors. We will conduct an evaluation of each of the income generating activities by using the ranking system below to serve as IGA coordinates on the risk matrix (Day, 2007).

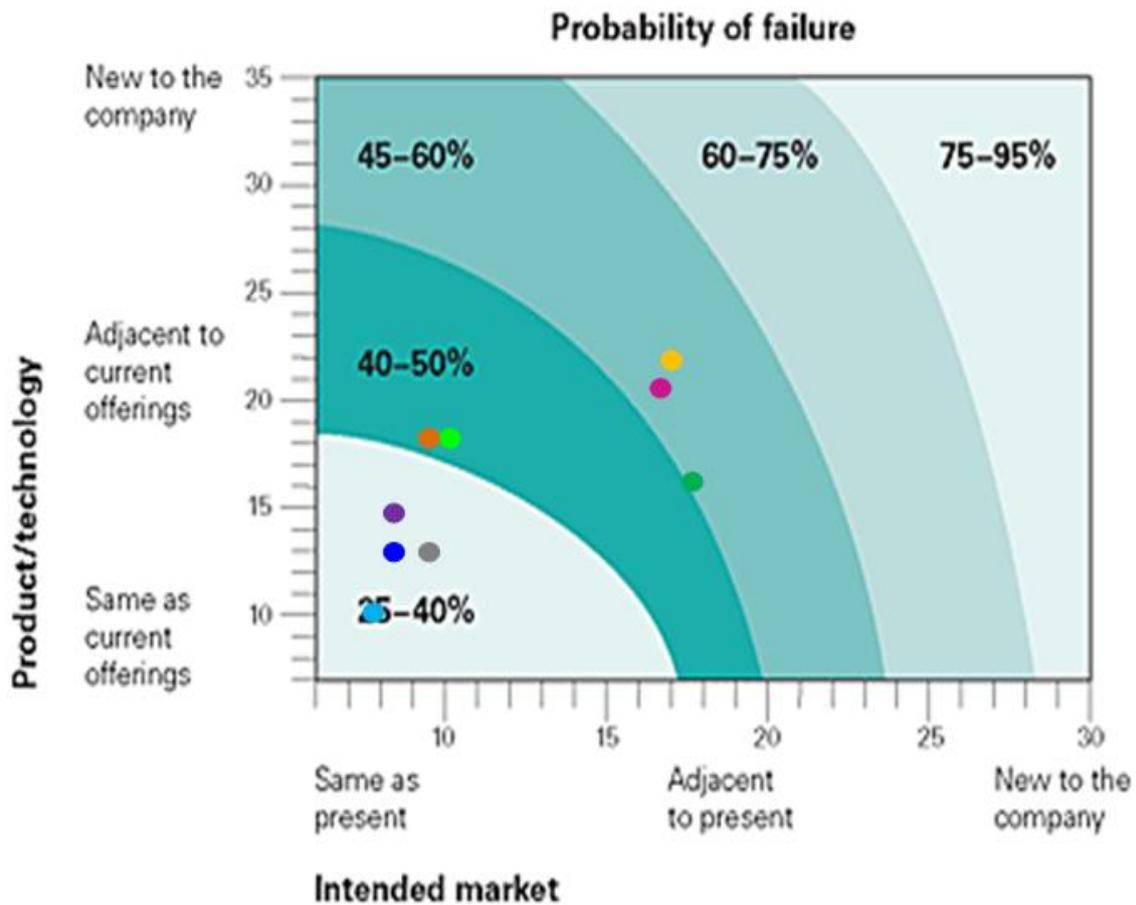
Figure 2

| Innovative Solution | Intended Market (X) | Product/Service/Technology (Y) |
|-------------------------------------|----------------------------|---------------------------------------|
| Charity Shop | 18 | 21 |
| Children's Summer Programme | 19 | 15 |
| Training | 6 | 8 |
| Friends of WSREC | 8 | 13 |
| Historical Site Visits | 18 | 19 |
| ID Cards | 7 | 11 |
| Interpretation Services | 11 | 17 |
| Selling Goods | 10 | 11 |
| Eco-Friendly Craft Workshops | 10 | 16 |

The IGAs have been plotted onto the risk matrix based on their score regarding the intended market and the product/service (Figure 3).



Figure 3



Children's summer programme, historical site visits and charity shop outlet all fell within the highest risk rating, between 45-60%. Eco-friendly craft workshops and interpretation services showed the median potential for risk, between 40-50% of risk. Training, ID Cards, selling goods and a Friends of WSREC scheme have been forecasted to involve less risk, between 25-40%.



6.3 Traffic Light Risk Indicators

The potential risk for each activity in WSRECs innovation profile acts as useful criteria that can allow WSREC to make informed decisions. We have used a traffic light system to illustrate clearly the risk of potential income generating ideas that were identified in the risk matrix.

Green indicates a low level of risk associated with implementing a particular income generating activity:

| | |
|------------------|---|
| Training |  |
| ID Cards |  |
| Selling Goods |  |
| Friends of WSREC |  |

Yellow indicates a moderate level of risk associated with implementing a particular income generating activity:

| | |
|------------------------------|---|
| Eco-Friendly Craft Workshops |  |
| Interpretation Services |  |

Red indicates a high level of risk associated with implementing a particular income generating activity:

| | |
|-----------------------------|---|
| Children's Summer Programme |  |
| Historical Site Visits |  |
| Charity Shop |  |

This section has identified the suitable growth strategies using the Ansoff Matrix and the related risk for each IGA. The next section will analyse each IGA using the Real-Win-Worth screen (Appendix D) (Cited in Day, 2007).



INCOME GENERATING ACTIVITES



High Risk

7.1 Children's Summer Programme

The central location of WSRECs enclosed building could host a summer programme for children with the dual focus of being environmentally friendly. It could be an imitation of the programme offered by Let's Cook, Grow and Sew Together. WSREC conducted a children's summer programme in summer 2016 and it attracted twenty-four children.

There is a potential market for this activity as a high number of parents work during the school holidays and they require a form of childcare provision. An affordable and central summer programme with an environmentally friendly focus matches a wide range of markets. There is a high level of competition therefore the demand of a children's summer programme would be dependent on the quality and reputation it gains. Due to the necessity of the product and the wide range of competitors there should be no hostility to market entry. The service could satisfy the market based on the positive feedback received from the most recent programme.

WSRECs experience in the promotion of equality and diversity will be attractive to parents of potential summer camp attendees. The central location and old schoolhouse building is accessible and promotes trust. The environmentally friendly focus of the programme is a unique selling point. It may also attract the help of volunteers who are interested in a career in childcare or teaching. This advantage can be sustained as WSRECs mission, location and environmental focus is not due to change.

The product already exists but would have to be quality checked and tailored to a new market. Marketing will be essential to maintaining awareness of the product.

WSREC staff have the ability to provide a wide variety of activities for children. WSREC has a different environment to competitors that may be appealing to families as there is a significant emphasis on equality and environmental issues. They have a well-suited building with a hall, outdoor space and security entrance that is in a great location in the West end of Glasgow. This is an invaluable resource that would otherwise have a high cost attached. Despite these resources, WSREC do not have staff available to facilitate a children's summer programme.



There are high risks associated with this option. The forecasted returns depend on the cost of staff salaries, which will exist but could be reduced with the recruitment of PVG checked volunteers. The environmental focus of the summer programme should help to maintain a low budget. Working with children means that all staff and volunteers must ensure perfect health & safety procedures and be PVG checked. Volunteers with relevant qualifications in childcare and teaching could help to reduce the risk of difficulty in creating brand trust. As this programme is responsible for children, the parents will expect a high quality that must be maintained throughout. Children must be taught ethically and the programme cannot have any political leanings beyond being environmentally friendly. WSREC would be entering into a brand new market and would therefore have to gain an understanding of the market and adapt over time. A children's summer programme has the potential to generate income but has high risks associated with it that do not align with the low risk preference of senior management.

7.2 Eco-Friendly Craft Workshops

Medium Risk



WSREC could sell interactive workshops that provide individuals with skills such as sewing, up cycling and zero waste cooking. Workshops will give individuals the opportunity to develop skills and increase their commitment to the environment. The workshops are already being provided by the Lets Cook Grow and Sew Together project. However, it would require additional staff or volunteers out with this project to conduct workshops.

'Rags to Riches' in the Govanhill Baths, for example, has shown its success, winning multiple awards for their up cycling workshops conducted multiple times per week. They are located in the Southside of Glasgow. Although similar courses are offered across the city, WSRECs central west end location and building with a community garden gives them a competitive advantage. However, WSREC has affiliations with competitors and this must be taken into consideration.

WSREC could understand and respond to the market. They have a high level of creativity regarding environmental management so they could adapt the existing courses. The budget will be low as there is no space rental involved, refreshments can be provided from the community garden and materials will be recycled and second-hand. However, the cost of



participating would have to cover the staffing costs as WSREC do not have staff available to facilitate these workshops despite having the expertise to train facilitators.

There are medium level risks associated with this option as the product is already designed and can be imitated at a low cost however there are staffing costs that may be high and affiliated competitors must be considered. It could support WSRECs growth strategy as it has potential to generate sustainable income.

7.3 Friend Scheme

Low Risk



The concept of a friend scheme is that individuals, groups or businesses can become friends of WSREC and in doing so support the organisation financially and receive benefits and insight into WSRECs work.

Friend schemes exist in a number of sectors such as arts and heritage, health and social care, the environment, education and leisure (Bussell and Forbes, 2006). Although the majority of literature discussing friend schemes relates to the arts and heritage sector it is still relevant in relation to WSREC as a third sector organisation.

Gee (2011) explains that friend schemes can be managed in-house using staff that handle administration duties, income and expenditure. In this format, membership income is paid directly to the organisation. It is advisable that an organisation that already has charity status they would do well to keep a friend scheme in-house (Gee, 2011).

Friend schemes fall into two categories, to generate revenue that an organisation can use and to cultivate loyalty to an organisation (Horan, 2001). They require an organisation to treat friends as a high priority group rather than an administrative burden. A key challenge regarding friend schemes is achieving the correct mix of membership benefits and membership price levels. Management must also be aware of the time involved in sustaining a friendscheme, as it requires managing a database, recruitment, renewal and communication.

A large database of private sector companies who have made a pledge to equality and diversity is being produced by WSREC and signals that there is a potential private sector



market for a membership. Therefore, a friend scheme aligns with current WSREC strategy as described by a member of WSREC core staff Caroline McKoen (2016):

“WSREC is working hard to diversify its income away from government funding and we are approaching companies and employers in and around Glasgow who might be interested in becoming part of a network of ‘friends’ or supporters of our charity.

In order to find new sources of funds for WSREC, we have begun research into developing external relations with companies in our catchment area that are committed to equalities. At the same time we are looking at packaging our diversity and equality workshops to sell them in a competitive marketplace.

We now turn to the private sector and offer them the opportunity to support our work in challenging discrimination, reducing inequality and promoting good relations between all communities.

Options include:

- Making a donation to our core funds
- Joining our mailing list
- Offering work place tours
- Exhibiting at WSREC job fairs and meeting with our trainees
- Arranging training on equalities and diversity, hate crime, positive outreach, etc.”

This current strategy could be transformed into a long-term income generating activity such as a friend scheme, rather than an individual campaign. The relationships being built with private sector companies could be offered to a wider market and as a result increase possible returns. SCVO (2016) stated that nine out of ten people in Scotland supported a charity in 2015. The survey of 1000 individuals also showed that 77% who supported a charity in 2015 donated money. This shows that there is also a market for individual donors (SCVO, 2016).

There is a need for a friend scheme, as WSREC requires income generation and long-lasting sustainable working relationships across sectors. The current increase in hate crime/intolerance has also placed a focus on equality and diversity therefore individuals,



groups and businesses are seeking ways to show support. This social change allows WSREC to turn their expertise to their advantage and help secure core funds as well as promoting their mission.

Membership prices would apply. There are a variety of pricing methods available:

- ✿ Annual membership fee
- ✿ One-off membership fee
- ✿ Monthly membership fee
- ✿ Joint membership fee
- ✿ Student membership fee
- ✿ Family membership fee
- ✿ Tiered system according to membership benefits
- ✿ Life membership

All of the above can be fixed rate, sliding scale or a donation.

Unlike the arts and heritage sector that offers free tours and early ticket purchases as benefits, WSREC will be attractive to individuals, groups and businesses that are interested in supporting equality and diversity. Therefore, benefits should educate individuals on the issues surrounding equality and diversity in the West of Scotland, provide an insight into the work of WSREC and give members a chance to support WSREC in tackling inequality and discrimination financially. Such membership benefits would ensure demand from the relevant individuals.

We suggest benefits for individual friends to include:

- ✿ Quarterly newsletter
- ✿ AGM invite
- ✿ Access to board meetings
- ✿ Opportunities to participate in WSREC training courses
- ✿ Friends networking events such as a coffee morning or supper club
- ✿ Annual gifts

We suggest benefits for private sector friends should include:



- ✿ Sponsorship opportunities
- ✿ Networking opportunities
- ✿ Updates on equality and diversity developments
- ✿ Volunteering opportunities
- ✿ Brand partnership

Private sector companies that have made a commitment to equality will benefit from the membership as it allows them to achieve their organisation aims, boost employee morale, attract the best talent, and improve employee retention. The membership can also improve marketing, generate positivity around a brand, and help to define corporate identity. Therefore it is highly likely that they will find the scheme attractive.

A friend scheme can be designed and published in-house. However, for it to be successful it will need to be marketed effectively. This requires a marketing strategy aimed at the design of the scheme, promotion, communication and pricing. It will allow individuals, groups or businesses to support equality and diversity. High quality benefits will complement and ensure customer satisfaction. WSREC have the appropriate management. If the friend scheme is conducted with existing staff time constraints it is critical that the following tasks are undertaken professionally:

- ✿ Management
- ✿ Newsletter/Communications
- ✿ Benefits
- ✿ Planning of friends events
- ✿ Promotion of the scheme
- ✿ Updating the database
- ✿ Income and expenditure

Few minority ethnic charities in the West of Scotland offer a friend scheme. WSREC are experts in equality and diversity with 45 years of experience and current affairs have created a demand for equality support. This advantage could be sustained provided relationships with friends are nurtured, for example, through excellent communication. The scheme should be adapted to changing environmental contexts and friends needs. WSREC have adequate resources including substantial contacts and high staff commitment. However, resources are not superior due to timing and funding constraints but this should not affect



the success of a friend scheme as superior resources are not the selling point, the competitive advantage lies in equality and diversity expertise.

The costs of membership should be substantial enough to cover the costs of benefits provided with excess left over to contribute to WSREC core funds. There is also an opportunity to add gift aid to donations given via PayPal or direct debit. There are minimal risks associated with the friend of WSREC scheme. The workload must be distributed evenly and not affect the current work of WSREC. Also, a friend scheme may not give the expected returns immediately. However, we believe it will be effective in the long term. It supports WSREC's growth strategy, as it is a low risk option that has potential to generate sustainable income.

Evaluation questions are a potential tool for WSREC to assess and adapt a friend scheme and ensure that it is achieving maximum effectiveness (Appendix F).

Resourcing Scotland's Heritage offer a training course on creating and managing a friend scheme. The course includes practical tips and exercises to support organisations to grow key potential unrestricted funds to support your work. This course would cost £60 for one individual. For further information contact louise.downing@scotheritage.org or 0131 556 3353.

7.4 Historical Site Visits

High Risk



The historical site visit and tour templates from the Branching Out and Roots Scotland project could be used to provide a similar service for an allocated cost. Although historical site visits is a saturated market there are a lack of tours that offer a wide range of translation services. Interpretation services provided on the guided tours would give WSREC a competitive advantage.

In order to provide guided historical site tours it would require at least one member of experienced staff to conduct the tour. WSREC staff have limited time and we feel that this would be difficult to implement. Despite having a wide variety of languages spoken in WSREC, these would have to be adapted to historical site visit interpretation. WSREC has



limited expertise in doing historical site visits compared to the competitors. It is a very saturated market and not WSRECs speciality.

It would be difficult for a competitive advantage to be sustained. WSREC staff have limited time and organisations that are renowned for their excellence will be more attractive to tourists. The competitors are established and therefore would not feel significantly affected from a small organisation joining the market.

It is a completely new market and it would take time to develop an understanding of it. There are significant costs associated with a tour:

- ✿ Coach
- ✿ Refreshments
- ✿ Entry Fees
- ✿ Staff costs
- ✿ Insurance

Therefore, the fee would have to be high and there would have to be significant demand. It has the potential to generate income but the risks involved, such as major competition, foster a high level of risk and reduce the potential of this option.

7.5 ID Cards

Low Risk



WSREC have the resources to design and produce employee ID cards for sale. They have a card printer and experience in producing the final product that is a designed and printed ID Card with lanyard and plastic case. The competitive advantage would be that the money is supporting a local community organisation that promotes equality in society, rather than a corporate organisation. However, competitors are large-scale office and stationary suppliers therefore there may not be competitive crossover.

The forecasted returns would be greater than the costs as it costs £0.50 to create an ID Card with a lanyard and a cover. These could be sold for between £3.50 and £4 for double-sided ID Cards and £2 for the cardholder and breakaway safety lanyard.



We conducted a survey to identify demand for this product (Appendix E).The survey was designed to gain insight into the nature and preferences of employee ID card provision within the third sector in Scotland. Three out of the nine respondents used ID cards that they produced in-house. The five participants who did not use ID cards said they were unnecessary as the organisations were too small.

Despite all respondents saying they would prefer to buy ID cards from a third sector organisations rather than private sector, we identified no need for the provision of ID cards within the third sector.

The lack of demand for employee ID cards in the third sector led us to undertake research regarding the demand in the private sector. We called door-to-door to local private sector firms and identified that there was no demand for employee ID cards. These organisations have a small number of employees and secure doors causing employee identification to be unnecessary. As a result of our findings, it is apparent that there is not a significant demand for employee ID cards in Glasgow. Despite having low risk associated with it, this option does not appear to be sustainable enough or enjoy enough demand to contribute towards the core costs of WSREC.It is unlikely that a competitive advantage could be sustained due to the initial low demand as illustrated by our survey.

7.6 Interpretation Services

Medium Risk



WSREC could utilise its diverse language pool as interpretation services for sale. There is a need for this service due to the increase in non-native English speakers residing in West of Scotland. Companies or organisations that require interpretation services could be charged for the service.

Interpretation services are often hired to be effective in resolving communication issues in order to continue operations; therefore quality and professionalism are desired. This may deter clients from investing in a newly formed interpretation service. For this reason WSREC interpretation services may be more suited to smaller, local organisations.The languages spoken within WSREC are a superior resource but the individuals would have to be trained in interpretation in order to compete in the market.



WSREC does have a diverse range of languages within its organisation. However, a similar third sector equality organisation provides interpretation as an established social enterprise, and there are a high number of private sector interpretation services. Due to the high competition, a competitive advantage would be difficult to sustain. Established private sector interpretation services would not necessarily be affected by entry to market, however third sector competitors with similar missions to WSREC must be considered.

Despite catering to a similar market as its current operations, WSREC would have to tailor this new product to rival competitors. The costs associated with providing interpretation services are management admin, staffing, training and marketing strategy. Due to the high level of competition, the demand required to make a profit may not exist.

There are medium level risks associated with this option and the costs involved in staffing, training and marketing may not be returned due to a saturated market. There is also a close relationship to third sector competitors, which must be considered.

7.7 Selling Goods/Slogan Tote Bags

Low Risk



Deputy Director stated in her interview that there are a number of projects such as Lets Cook, Grow & Sew Together and 3CH that deliver goods and products through training. Selling goods was mentioned regularly throughout the core staff interviews also.

Creating a low cost product such as a canvas tote bag with statements about the current social sphere promoting equality in light of the recent political affairs would be attractive to consumers that have no existing knowledge of WSREC. This would allow the product to be sold in the WSREC offices but also at events, online and through local suppliers. There is a competitive advantage because the organisation supports equality as its core value and therefore its product is a genuine continuation of creating an inclusive society. There is always however the threat of larger producers when selling goods.

We believe this would be more effective in generating income than the products created through WSREC projects as the labour-intensive nature of production was mentioned during core staff interviews as an issue. In order to sell goods from Lets, Cook, Grow & Sew Together volunteers would be needed to assist production due to the lack of free staff time.



A slogan tote bag however would require no labour within WSREC. WSREC has produced tote bags for individual projects and therefore has knowledge of suppliers. A central West end location is also beneficial for approaching local retailers. The costs will be low for production and therefore returns will be greater. If sales are low, WSREC can adapt and change the product to boost demand.

Tote bags are in demand due to their affordability and multi-purpose use. The West end of Glasgow has a large student population who are often politically engaged and therefore slogans promoting WSRECs mission may be well received. There is a potential market, as consumers will be enticed by the additional factor of supporting a charity as well as a social cause.

The tote bag would include WSRECs logo but place more focus on a slogan that promotes equality and diversity.



7.8 Training

Low Risk



WSREC have previously been successful in selling training in equality and diversity. Due to the current social environment, there is a need for many employers and organisations to respond to the increase in hate crime caused recent political decisions such the United Kingdom's decision to leave the European Union. There has also been a push towards equality and diversity in the workplace since the Equality Act 2010.

There is a potential market for this product as training is required across third, public and private sectors. It was also noted by a member of core staff that public sector equality duty makes it compulsory for statutory sector bodies to undertake equality and diversity training. The need for the product exists; however there is high competition and public and private



sector organisations may seek training from highly qualified individuals. Therefore, WSREC would have to create training packages that were highly professional.

A training team would need to be recruited from existing WSREC staff. A member of core staff explained that training would have to be professionally packaged, marketed, and delivered. The product should satisfy the market if a high level of quality and professionalism is adopted.

Highly skilled staff are available to design and conduct training. However, this would have a cost attached, as any training conducted would have to do so out with individual project salaries. The building provides spaces for training to take place, although some clients may prefer a facilitator to travel to their premises. WSREC's longstanding experience is a superior resource that will be recognised by potential clients.

WSREC's projects are currently operating in this social environment and can therefore forecast rising issues and needs. Consistent feedback from clients will also allow evaluation of training.

The forecasted returns should be greater than the costs as beyond staff costs the skills and materials exist. The training could be designed and marketed in-house at a low cost. The price charged could be high as training can be bespoke. There are low risks forecasted for this IGA as the skills and human resources already exist and the need for the product exists. One risk associated with selling training is that if the quality and professionalism is not sufficient it may not fulfil the consumer's needs.

WSREC core have identified a range of training that could be repackaged and sold to the market. There are training courses that already exist within WSREC.

3CH project currently offers Equality and Diversity Training for Practitioners. The training is designed to be delivered within three hours and is for anyone working with young people or community groups. The charge for this has been estimated at £200 generally and possibly £160 for other charities.

Let's Cook, Grow & Sew Together currently provide healthy eating cookery courses themed around local produce and low waste. The cost for this is the cost of a sessional staff, at an



hourly rate of £9.62, depending on how long the session is for, and refreshment costs which works out to be roughly £3 per head.

Potential training could be designed for:

- ✿ Equality and diversity in the workplace
- ✿ Increasing diversity workforce
- ✿ Equality and diversity recruitment
- ✿ Racism
- ✿ Homophobia
- ✿ Islamophobia

An idea that was generated by a member of core staff was that WSREC could up skill employees that were willing to deliver training. This would have the additional benefit of enhancing the output of their individual projects.



SOCIAL ENTERPRISE



In addition to creating a potential income generating ideas we have conducted research on WSREC becoming a social enterprise. This social enterprise would take the form of a charity shop.

8.1 Charity Shop

High Risk



A potential social enterprise is a charity shop outlet for WSREC that will generate income that will contribute to core funds. The outlet would also serve the social purpose of providing employment opportunities and valuable work experience to WSREC service users, particularly individuals from minority ethnic communities. There is a need for such a service because individuals from ethnic minority communities and non-native English speakers are actively discriminated against in the job market.

The charity shop would require a suitable location with passing trade, senior staff to manage the charity shop and the employability and training program. If a location with regular passing trade is selected for the charity shop and prices are affordable potential customers will buy the goods it hosts. There is a significant market for charity shops as increasing numbers of individuals shop in charity shops due to their affordability.

The unique selling point is the employability and training it offers to individuals from minority ethnic backgrounds. WSREC could publish case studies of individuals who have benefited from the opportunities within the charity shop.

WSREC has individuals who can utilise the training within the charity shop. However, WSREC is not currently a social enterprise. This will be a significant change to the organisation and will require support in order to create a successful charity shop. Senior management will require training on social enterprises. It is difficult to predict whether the returns will be greater than the costs. This is dependent on the location of the shop, the items in the store, how it is managed and the profits. A charity shop has the potential to foster long-term growth. However, it is dependent on the commitment to social enterprise that WSREC is willing to make, as they would have to accept a higher risk with the potential for sustainable future income.



A useful training session that may help WSREC gain an understanding of social enterprise is being held on the 13th September 2016 in Glasgow. Starting a Social Enterprise is a half day training course that helps organisations decide if a social enterprise model suits them and what is involved in the process. The course costs £42. More information can be found at <http://www.gsen.org.uk/content/events/272-starting-a-social-enterprise/> or by contacting training@gcvs.org.uk.

Loan funding could support the creation of a charity shop. Although it is a move away from the traditional grant funding used by WSREC it would guarantee start-up investment for a social enterprise. Social Investment Scotland (SIS) aims to help third sector organisations in Scotland that experience difficulties in securing finance from banks and other sources. Their investment has supported successful social enterprise Social Bite. As well as providing repayable loans to charitable organisations, social investments also desire a social return. They believe a good social investment is one that maximises its impact in sustainable ways, be it economically, socially or environmentally. WSREC appears to be eligible for SIS loan funding as long as its constitution allows borrowing. We recommend that WSREC researches social investment as a means to create a sustainable source of revenue, more information can be found at <http://www.socialinvestmentscotland.com/>.

Another potential source of funding for a charity shop social enterprise is Social Firms Scotland. They define a social firm as a social enterprise that creates employment, work experience, training and volunteering opportunities for individuals who face barriers to employment. This appropriately fits the brief of a WSREC charity shop that enhances employment support for individuals from minority communities. Social Firm Scotland assists new business start-up, transformation of charity projects and social franchising, more information can be found at <http://socialfirms.org.uk/>.



ADDITIONAL RECOMMENDATIONS



In addition to the potential income generating activities, we would like to provide further recommendations to help WSREC generate income.

9.1 Funding

After conducting research on potential income generating ideas we have identified that the majority of activities require funding to some extent. Therefore, we recommend locating funding from potential funders including:

- ✿ Big Lottery Fund 'Investing in Ideas'
- ✿ Heritage Lottery Fund 'Resilient Heritage'

9.2 Fundraising Officer

The internal resource assessment identified WSRECs staff as having very limited spare time. The income generating activities discussed throughout this report require time input and commitment to ensure their success. Therefore, we recommend a part-time paid fundraising officer. The ideal candidate will have previous experience fundraising and marketing within the third sector. Although there are not available funds to support this role immediately WSREC should remain alert for funding opportunities.

9.3 Marketing and Promotion of WSREC

WSREC could create a strong online voice using social media and blogging. WSREC has a strong social media presence, updating individuals on activities and events being held at WSREC. In addition to this we recommend that WSREC make official comments on current affairs including Brexit. We believe that this will promote the beliefs of WSREC and increase the awareness of the organisation. As well as social media sites, the organisation could manage a blog that discusses current affairs and advise on how to overcome intolerance such as hate crime. This strategy would align with the suggested production of goods such as slogan tote bags that respond to negative social trends and promote equality. In addition, we recommend that the newsletter be published quarterly. This will increase the presence of WSREC and allow possible Friends of WSREC and the wider community to gain an insight into the work WSREC has been doing.



9.4 Organisational fundraisers

We recommend WSREC organise fundraisers at least twice a year. Fundraisers will raise awareness of the work WSREC, increase team morale and generate income. In September, WSREC staff will climb Ben Nevis to raise income. In addition to this, we believe organisational fundraisers that have the potential to be the most successful include:

- ✿ Community Festival
- ✿ Swap shop

These have been selected as they allow an unlimited number of individuals to attend the event.

WSRECs Let's Cook Grew Sew Together recently held a Swap Shop in the office building that had around 120 individuals attended. Therefore, we believe that a Swap Shop could be held outside of the project to generate income. This would require involvement from all members of staff and has the potential to generate a one-off income payment. A community festival could take multiple themes including a winter or a summer festival. This fundraiser would require involvement from all members of staff to increase awareness of the work of WSREC and generate a one-off income payment.

9.5 Training Events

We recommend that until a potential fundraising officer is employed that WSREC send its staff on courses that may improve their knowledge of fundraising strategies. The member of staff that goes on the training course can then share this with the whole core staff at the Monday morning meeting.

The Foundation for Social Improvement (FSI) is conducting training courses in Glasgow on the 12th October 2016. Charities are eligible for free FSI membership if you are a registered UK charity with an annual turnover of less than £1.5 million. The training can be booked online and the resources used during the training are extended to participants afterwards.

Two of six appear highly relevant to WSRECs future income generation strategy: Developing Corporate Relationships and Direct Donor Marketing. Both are full day courses and require a



£50 deposit, £40 of which is returned on attendance and £10 is retained as a booking fee. More information can be found at <http://www.thefsi.org/services/training/glasgow/>. We recommend that one member of WSREC staff each attends both these courses.



PROJECT REFLECTION AND CONCLUSION



10. Project Reflection

A major obstacle in our research was time constraints. We struggled to arrange appointments to meet with multiple third sector organisations within the project time as the majority of contacts were extremely busy and due to the season there were many on annual leave. Additionally, we struggled to achieve sufficient response rates of completed surveys. If we had a longer time period to conduct the research it may have been possible to increase our survey responses and meet with a greater number of organisations. On reflection we understand that despite our earlier frustration this is no fault of our own. The pressure third sector organisations are currently under has led to increased time constraints that we witnessed first hand within WSREC.

Another difficulty we faced was creating innovative income generating ideas to support WSRECs core funds. Initially we fostered ideas of social enterprise but the majority of these proved unworkable as the internal resource assessment made it apparent that despite WSREC having considered a range of income generating activities it had been lack of resources and funding that prevented them from materialising. This led us to involve a mix of solutions that foster varying risk and could be achieved using existing WSREC resources. The restraints experienced in our project have taught us that social research is something far harder than we have ever undertaken in our university experiences to date.

The project presented us with continual challenges throughout the eight weeks. However, through reflection, we have presented solutions to WSRECs funding issues that we believe have the potential to resolve the core fund deficit.

Overall, we are both extremely grateful for the opportunity to take part in such an educational and worthwhile project. We hope that the information we have presented will benefit WSREC in generating income that supports their core funds, and as a result, enhances the important work that they do. The skills we have gained from this project have been invaluable to our education and work experience. Working alongside WSREC staff has inspired us and we have been motivated by their commitment and passion for supporting minority communities. Their work is more relevant than ever considering the rise in intolerance and social divide in modern society and we hope they are successful in continuing to work towards their social mission of creating an inclusive society free from discrimination.



Although the project is finished we would like to take this chance to say that we are willing to give continued support to WSREC in any way that we can. Income generation is essential to allow WSREC to continue contributing to supporting equality and diversity.

11. Conclusion

The aim of this report has been to provide WSREC with a variety of potential income generating activities, each with different levels of risk, in the hope that the organisation can select the most suitable solution according to their resources and capabilities. The solutions we have identified include eight potential income generating activities and a social enterprise that can be used to generate core funding. We believe that the organisation can benefit from the solutions provided in this report and successfully generate income that will support the self-sufficiency and sustainability of WSREC.



Appendix A: Interview Questions

The questions asked were as follows:

1. What languages do you speak?
2. Can you give a general overview of your project (activities, users, funding)?
3. What are the goals of the project?
4. Within your project do you see any opportunity for income generation?
5. Within WSREC as a whole, do you see any opportunities for income generation?
6. Can you give details of any income generation within WSREC that you are aware of since joining?
7. Please give your opinion on the following IGA's:
 - a. Developing training
 - b. Selling goods
 - c. Advertising space
 - d. Existing space rental
 - e. Organisation fundraisers
 - f. Individual project fundraisers
8. Could you rank the three most feasible IGA's in order of preference?
9. Are there any IGA's/social enterprises in Scotland that you are aware of?
10. What do you believe the main benefits that a sustainable IGA would bring to WSREC?

Please give your opinion on the following IGA's:

- a. Developing training
- b. Selling goods
- c. Advertising space
- d. Existing space rental
- e. Organisation fundraisers
- f. Individual project fundraisers

Could you rank the three most feasible IGA's in order of preference.



Appendix B: Interview with Deputy Director

The purpose of these questions is to investigate the feasibility of particular Income Generating Activities against the knowledge and lived experience of WSREC core staff.

| | |
|-------------------|--|
| Name | Ghzala Khan |
| Position | Deputy Director |
| Languages spoken? | English, (oral and written) Urdu and Punjabi (oral only) |

| | |
|--|--|
| <p>What are the main reasons for WSREC requiring additional surplus income? What are the financial challenges? How do they affect the organisation as a whole?</p> | <p>An increase in project delivery has meant more resources are being used from core funds i.e telephone, internet, postage, payroll etc. Funders do not always support 100% full cost recovery and this can have an impact on the organisations finances. In recent years, any reserves that we have are being used for events such as away days, audits and annual reports. Our management structure pay is not fully supported by a particular fund although GCC funding does support part salaries. We need to make up staff salaries from management costs allocated to projects and again this is an area of concern as we need to ensure that we maintain the income through grant generation to a level which is sufficient to cover staff salaries. The impact of this not happening would be management would need to cut working hours and the management structure would therefore be affected by less resources available to support all WSREC staff.</p> |
| <p>Can you provide us with a brief history of Income Generation within WSREC? (books, training packs, ID cards, equality & diversity training)</p> | <p>ID cards – this is a service we offer, however not marketed widely. We find small organisations using this service from time to time. Books – we have some resources from years ago – many of them are linked to us when we were a racial equality council and before the Equality Act 2010. Although these resources are still available to buy they</p> |



| | |
|---|--|
| | <p>are now outdated.</p> <p>Training packs – we have staff delivering training through funded projects almost on a weekly basis. These are not charged as funding covers the resources for these to happen and are built into funding applications as part of outcomes. A prime example of this would be the 3CH project delivering youth practitioner training to schools and youth clubs. Additionally we do deliver equality training from time to time and do charge for this but this is on a needs only basis as we currently do not employ a training officer who could regularly market this service.</p> <p>A few years ago an intern did organise a training pack on the areas for training delivery, however lack of resources has stopped us marketing this fully.</p> |
| <p>What budget is available for investing in Income Generating Activities in WSREC?</p> | <p>There is a very limited budget at the moment. WSREC staff are raising funds through a charity fundraiser in September and some resources could be made available through this. Alternatively we could look into start up costs through funding opportunities.</p> |
| <p>Do you think it would be feasible existing WSREC staff to coordinate an Income Generating Activity alongside their workload?</p> | <p>Yes – for some staff.</p> |
| <p>Given a business plan was produced for a long-term sustainable income generation activity, do you believe that WSREC could implement it?</p> | <p>Given the time and resources, WSREC would endeavour to implement in the areas that involved little risk and maximum effectiveness.</p> |
| <p>Please include any other thoughts on Income Generation in WSREC.</p> | <p>We have a number of projects like Cook Grow and Sew and 3CH which deliver goods through products and training. There has been talk about opening a charity</p> |



| | |
|--|--|
| | <p>shop which would support social enterprise activities through volunteer development and retail experience for minority ethnic communities. We have a garden which is beginning to grow sustainable foods and we have experts within many crafts that could be utilised for income generation.</p> |
|--|--|



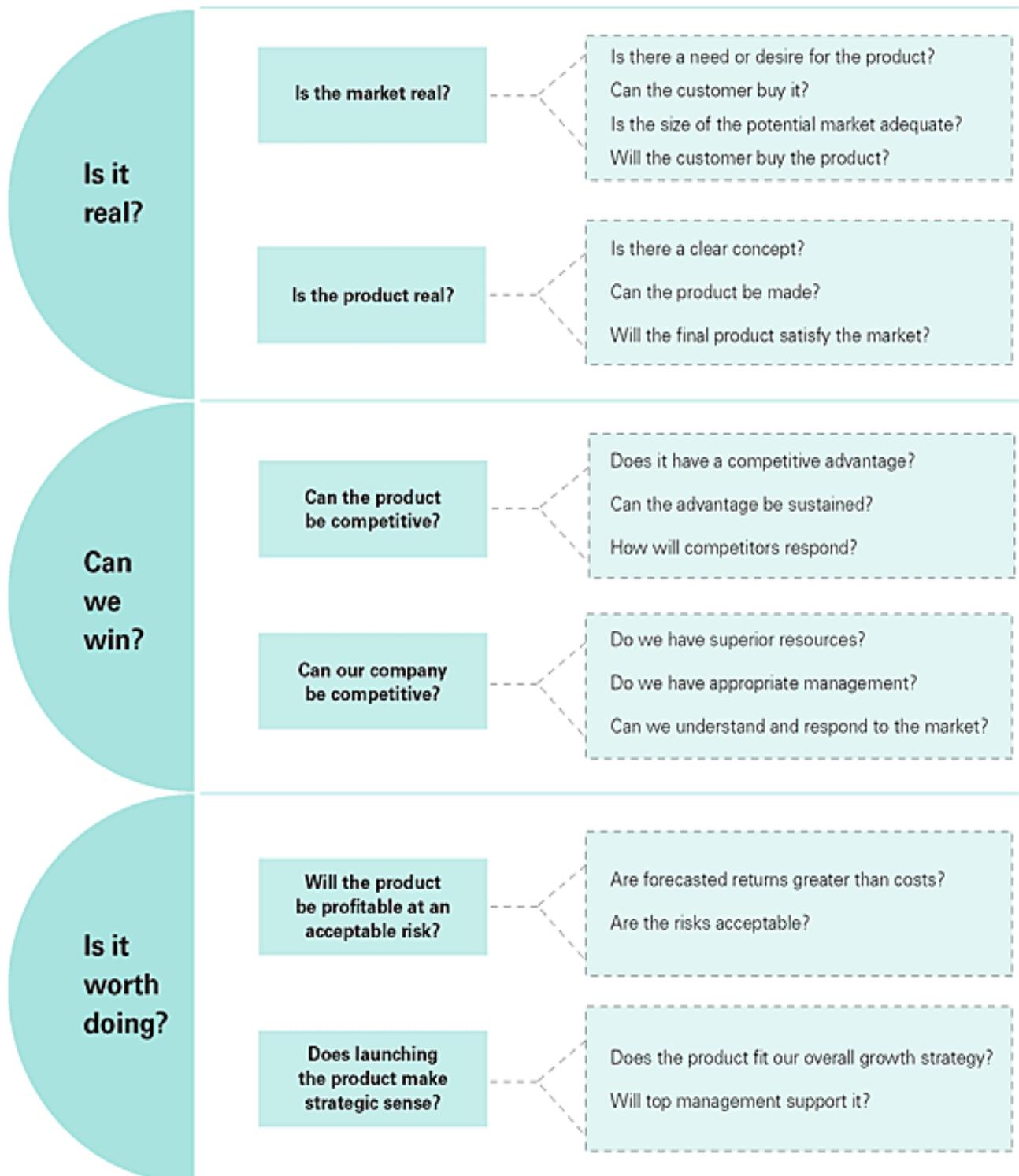
Appendix C: The Risk Matrix

| | Intended Market | | | | | |
|--|--|--|---|---|---|--|
| | ...be the same as in our present market | ...partially overlap with our present market | ...be entirely different from our present market or are unknown | | | |
| Customers' behavior and decision-making processes will... | 1 | 2 | 3 | 4 | 5 | |
| Our distribution and sales activities will... | 1 | 2 | 3 | 4 | 5 | |
| The competitive set (incumbents or potential entrants) will... | 1 | 2 | 3 | 4 | 5 | |
| | ...highly relevant | ...somewhat relevant | ...not at all relevant | | | |
| Our brand promise is... | 1 | 2 | 3 | 4 | 5 | |
| Our current customer relationships are... | 1 | 2 | 3 | 4 | 5 | |
| Our knowledge of competitors' behavior and intentions is... | 1 | 2 | 3 | 4 | 5 | |
| | TOTAL (x-axis coordinate) | | | | | |

| | Product/Technology | | | | | |
|--|--|---|--|---|---|--|
| | ...is fully applicable | ...will require significant adaptation | ...is not applicable | | | |
| Our current development capability... | 1 | 2 | 3 | 4 | 5 | |
| Our technology competency... | 1 | 2 | 3 | 4 | 5 | |
| Our intellectual property protection... | 1 | 2 | 3 | 4 | 5 | |
| Our manufacturing and service delivery system... | 1 | 2 | 3 | 4 | 5 | |
| | ...are identical to those of our current offerings | ...overlap somewhat with those of our current offerings | ...completely differ from those of our current offerings | | | |
| The required knowledge and science bases... | 1 | 2 | 3 | 4 | 5 | |
| The necessary product and service functions... | 1 | 2 | 3 | 4 | 5 | |
| The expected quality standards... | 1 | 2 | 3 | 4 | 5 | |
| | TOTAL (y-axis coordinate) | | | | | |



Appendix D: The Real-Win-Worth





Appendix E: ID Card Survey

1. What is the name of your organisation and what is your job role?

2. Are staff in your organisation required to wear ID Cards?
 - Yes
 - No

3. If yes, does your organisation...
 - Produce ID Cards in-house
 - Purchase ID Cards from an external supplier

4. If yes, what are the main reasons for your staff requiring ID Cards?

5. If no, what are the main reasons for staff not requiring ID Cards?

6. How regularly does your/would your organisation purchase ID Cards?
 - For every new employee of the organisation
 - In response to a change in information, e.g. new logo, new address
 - Annually
 - Other (please specify)

7. Does your/would your organisation require ID cards with security features e.g. barcode, hologram
 - Yes
 - No

8. What price would you expect to pay for an ID Card Package that included the design and printing of ten ID Cards complete with lanyards and protective holders?
 - £10-£15
 - £15-£20
 - £20-£25
 - £25-30



9. Which supplier is more appealing to your organisation in relation to purchasing ID Card Packages?

- An established private sector supplier
- An ID Card service provided by an active and established third sector community organisation

10. If you would consider providing further information on request regarding this research please provide your email in the comment box below.



Appendix F : Evaluation Questions for Friend Scheme

(FT solutions, 2015)

http://www.ftolutions.co.uk/pdfs/perfect_membership_scheme.pdf

Joining

- 1) Has the number of new joiners increased, decreased or flat lined over the past 3 years?
- 2) Can you join online?
- 3) Is all of your promotional membership literature regularly proofed?
- 4) Do you use social media channels to promote membership recruitment campaigns?

Membership Renewal, Growth and Upgrading

- 5) Do you have a structured renewal schedule, process and campaign in place?
- 6) Is it simple and straightforward for your members to renew?
- 7) Have renewals increased, decreased or flat lined over the past 3 years?
- 8) Can members renew their membership online?
- 9) Is your renewals literature personalised?
- 10) Is your renewals literature content segmented?
- 11) Have you checked renewal literature copy recently to ensure it is up-to-date?
- 12) How often do you send out a membership survey?
- 13) Do you link measurable actions/accountability to key membership survey results?
- 14) Do you use social media channels to communicate retention and renewal content/information?
- 15) Do you proactively market membership upgrading to eligible members?
- 16) Can your members upgrade online?
- 17) Do you provide membership globally?
- 18) Have you considered more than one scheme type? Corporate / Affiliate

Processing and Reporting

- 19) Are you using a flexible and secure CRM/database?
- 20) Are opt-out subscription payment options incentivised?
- 21) If you send out hard copy renewals are you utilising bulk postal discounts available?
- 22) Does subscription income cover the cost of supplying membership services and benefits? If subsidised via other areas can it be justified?
- 23) Are you sending renewal confirmations electronically or in the post?



- 24) Fixed or rolling membership joining – Are you sure this is the optimal scheme type?
- 25) Can you confidently say that your current scheme type is optimal?
- 26) Do you regularly report on membership renewal/recruitment figures?
- 27) Is it simple and straightforward to retrieve current recruitment and retention figures?

Value & Convenience

- 28) Is the value of membership perceived by members to be higher than the annual financial cost?
- 29) Do you provide segmented member benefits to your members?
- 30) When evaluating member benefits do you consider member personas?
- 31) Have you actively explored improving your member value proposition (MVP)
- 32) Have you ever evaluated your online member value proposition?
- 33) Can your members pay via a number of convenient payment methods?
- 34) Can members pay via opt-out payment methods? E.g. recurring credit/debit card or Direct Debit
- 35) Have you considered the various price/value ratios via membership grade?
- 36) Is your organisation featured on HMRC List 3? (UK only)
- 37) Do you feature FAQs on renewal/joining literature or on your website?

Return or Exit

- 38) Has the number of lapsed increased, decreased or flat lined over recent years?
- 39) Do you send out an exit survey in place? Do you regularly check results?
- 40) When was the last time you delivered a lapsed member marketing campaign?
- 41) Do you know the average lifetime of membership and actively use this information?

Competition

- 42) Do you have competitors?
- 43) Are there any online social networking groups that have appeared outside of your organisation's ownership/remit?
- 44) Have you checked your offering and fees against your competitors/alternatives?



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