



Scottish Union of Supported Employment

SUSE Strategy & Business Plan 2018-2021



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Organisation Information

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1. Executive Summary

The Scottish Union of Supported Employment (SUSE) is the national representative body for supported employment providers and anyone interested in ensuring that disadvantaged people across our country have the opportunity of a working life.

A review of SUSE's operating environment concluded that with Scottish Government's long-standing commitment to the Supported Employment Framework and the launch of both its Fair Start Scotland employability programme and A Fairer Scotland for Disabled People Employment Action Plan in 2018, there is a once in a generation opportunity for SUSE to shape the future of employment services for people with disabilities and fundamentally improve the life chances of thousands of people who have been marginalised in our communities

SUSE undertook a strategy review and development exercise in 2018 that reset its vision and mission and established 6 organisational goals for the next 3 years:

Vision: A Scotland where people with disadvantages have access to supported employment to find and retain paid work.

Mission: To increase the availability, quality and impact of supported employment services in Scotland.

Goals:

1. SUSE is an efficient, effective, and financially viable organisation.
2. SUSE is recognised as the lead body for supported employment and the representative body for supported employment providers in Scotland.
3. SUSE is developing the capability of our members and ability of the supported employment workforce.
4. SUSE is working with our members to improve the quality of supported employment services in Scotland.
5. SUSE is stimulating, initiating, facilitating and supporting new projects and services to ensure supported employment provision evolves to meet the changing needs of employees and employers.
6. SUSE is working with members and others and encouraging them to work with each other, to advance supported employment provision in Scotland.

Linked to these goals, SUSE has specified a total of 36 aims and related strategies to be achieved and implemented by 2021, with 14 of its strategies prioritised for the first year of its business plan; these relate to planning and management; membership offer; income generation; standards of provision and practice; wider engagement.

This plan describes how SUSE will implement its organisational strategy in terms of existing and proposed services, project and initiatives; management approach and key resources; and financial model.

A number of business risks associated with the implementation of this business plan have been identified relating to finance, the achievement of its objectives and the reputation of the organisation, along with corresponding mitigating/ forward actions.

2. Introduction

2.1 About SUSE

The Scottish Union of Supported Employment (SUSE) is the national representative body for supported employment providers and anyone interested in ensuring that disadvantaged people across our country have the opportunity of a working life. We bring organisations together to campaign, network, improve how we work and share our experiences. Our aim is to support people with disadvantages to find and retain paid work by increasing the availability, quality and impact of supported employment services in Scotland.

This is a critical time for our sector. In April 2018 the Scottish Government launched the Fair Start Scotland programme, which over the next 3 years offers the potential to expand supported employment services across Scotland. In addition, it has produced an action plan to tackle the Disability Employment Gap in Scotland (at present only 43% of disabled people are working, compared to 80% of their non-disabled peers). This is a once in a generation opportunity for SUSE to shape the future of employment services for people with disabilities and fundamentally improve the life chances of thousands of people who have been marginalised in our communities

2.2 A brief history

SUSE started in 1995 and has played a leading role in the employability sector in Scotland most notably by working with government to develop a Supported Employment Framework for Scotland (2010), intended to ensure that providers are working to a consistent model and clients have a guarantee of a quality service. Our organisation had a strong reputation and was at the forefront of campaigns to ensure people with disabilities had access to employment opportunities. For most of its existence we have been run by a voluntary board, made up of trustees from member organisations.

In 2017 significant changes took place at SUSE. A new Chairperson took up post and the board decided to create a CEO role to lead the organisation and get it back on track. This leadership model has worked well for other membership organisations and has allowed them to better represent their stakeholders to policy makers and end their reliance on volunteers.

2.3 Progress this year

In the past year we have improved the governance of our organisation. We have developed a new mission statement and vision, recruited new trustees, revised our Articles of Association, developed and launched a new membership offer and improved the management of finances and risk. We have also reinvigorated SUSE as a campaigning and lobbying organisation and we hosted a successful annual conference. We are once again seen as a credible voice with the Scottish Government, local authorities and funders. For example, we are playing a leading role in the Scottish Government's Expert Advisory Group on the Disability Employment Gap and our CEO is chairing a similar group on their behalf for social enterprises. We have also recently training civil servants who are implementing the government's new Fair Start Scotland programme. Six local authorities have joined SUSE since we launched our new membership offer with several more in the pipeline.

The Big Lottery project was completed and ultimately generated useful outputs: an Inclusive Workplace Award and complimentary training for employers; an innovative Peer Support for Work model; a Good Practice Guide for Employers; a high profile DuoDay event and a new website – www.suse.org.uk This will include a searchable database of services, training and events for our sector – a unique resource in Scotland.

3. Operating Environment

3.1 Policy and Strategy Context

Recorded unemployment in Scotland is at a historic low, yet there are still large numbers of people in poverty and people with disabilities or long term conditions are still at a real disadvantage in the jobs market. Increased automation and the impact of Brexit are expected to have a significant impact on the labour market in the years ahead.

This is also a period of significant change in the employability landscape in Scotland. It has been estimated that over £630m is spent on employability each year, including funding for colleges. The Scottish Government are reviewing this spend and it is likely that there will be major changes in place by 2021. There are hundreds of employability providers across Scotland but many people with disabilities do not have access to good quality services in their local area and there is still too little support for people when they are in work. SUSE has an opportunity over the next couple of years to influence the changes that will take place by ensuring the voices of our members and the people they support are heard. In this section we have summarised the current policies and initiatives that influence our approach:

Employment

Fair Start Scotland (2018)

Fair Start Scotland is the devolved employment services that replaced the Work programme and Work Choice. The new service is delivered in nine contract areas across Scotland to reflect the reality of Scotland's geography, regional economies and population spread. The Scottish Government describes Fair Start Scotland as “being delivered collaboratively across a range of private, public and third sector delivery partners including a range of specialist providers to ensure people receive the right type of support for them. (It) has been developed by listening to the views of people who rely on employment support”.

The Scottish Government will spend £96M on Fair Start over 3 years to 2021. It is intended to support 38,000 people in that period, around 30% of whom are expected to move into work. The programme includes a supported employment element, described as “an internationally recognised 'place and train' model enabling disabled people to learn on the job with support from colleagues and a job coach”. Up to 4000 people could participate in a supported employment programme through Fair Start over the next 3 years.

No-one Left Behind (2018)

Published in March 2018, No-one Left Behind is the Scottish Government's action plan for achieving the integration and alignment of employment support services in Scotland. The report notes that “many groups continue to face real challenges in the labour market. These groups include disabled people (employment rate of 42.8% compared to 80.2% for nondisabled people); people recovering from substance misuse, people experiencing homelessness, and people with convictions”. The plan has 14 actions. Of particular relevance to the work of SUSE are:

Action 1 - Engage with people and organisations in a discussion on the future of the employability system in Scotland and publish our findings.

Action 2 - Work with Local Government partners, to develop a joint action plan that will identify and address emerging employability themes which will include a focus on improving integration and alignment of employability provision at a local level to help simplify the landscape.

Action 4 - Pilot a Single Health and Work Gateway service in Fife and Dundee to help disabled people and people with health conditions access support at an early stage.

Action 5 - From Summer 2018, the Scottish Government will work with partners within the Single Gateway pilot areas of Fife and Dundee to agree a plan to trial additional mental health support.

Action for Jobs - Supporting Young Scots Into Work: Scotland's Youth Employment Strategy (2012)

The Youth Employment Strategy was published in June 2012. It pulls together a range of actions across government and beyond aimed at tackling unemployment in Scotland's younger generation including:

- Development of a cohesive all-Government, all-Scotland effort to increase youth employment.
- A clear and targeted approach to support young people along the journey to employment.
- The development of progression opportunities with the apprenticeship programme.
- Targeted support to enable young people gain employment in growth areas such as energy.
- Intensive support for those furthest from the labour market through SDS' 'My Work Coach'.
- Financial incentives to employers to employ young people from disadvantaged groups.
- Intensive support services for disengaged young people.
- Targeted funding for Glasgow, Renfrewshire, North and South Lanarkshire and North and East Ayrshire.

Disability Employment

A Working Life for All Disabled People – The Supported Employment Framework for Scotland (2010)

In February 2010, the Scottish Government launched the framework for supported employment. This was a clear endorsement of the model as the preferred route for people with disabilities to be supported to enter and sustain employment. above. The foreword of the report states that *“national and local government are committed to creating a more successful country, with opportunities for all of Scotland to flourish. In order to achieve this we need to ensure that people who can work, and want to, are given the opportunity to do so. We know, however, that for many disabled people there continue to be barriers which deny them this opportunity”*.

The Scottish Government and COSLA worked together with a wide variety of partners to develop this framework. It represents a starting point for everyone to move towards a more consistent service model of supported employment. Since the launch of the framework however the number of supported employment services has fallen.

Disability Employment Gap Action Plan (2018)

The Scottish Government has committed to halving the Disability Employment Gap. Only 43% of disabled people of working age are in work compared to 80% of their non-disabled peers. In many cases the problem is even greater. Less than 10% of people who have learning disabilities are in work and only 20% of people who experience mental ill health and 25% of people with a visual impairment have the opportunity of employment. The Employability Policy team at Scottish Government has developed an action plan intended to halve the employment gap by 2038. SUSE and several of our members are active participants in the development of the action plan.

Disability

A Fairer Scotland for Disabled People (2016)

The Scottish Government's plan has five long-term ambitions and 93 actions intended to change the lives of disabled people in Scotland and ensure their human rights are realised. The Delivery Plan sets out the Scottish Government's approach to policy for disabled people. It is based on the social model of disability as opposed to the medical model. It is also rooted in the UNCRPD and in the aim of the independent living movement, which is that disabled people can live the life they choose, participating equally alongside other citizens in their families, communities, workplaces and wider society, with the support they need.

The plan includes a specific commitment to *“continue to promote the Supported Employment Framework and model for disabled people to learn on the job with support from colleagues and a job coach. We will require providers of future employment services to offer a diverse menu of options including supported employment”*

The Scottish Strategy for Autism (2011)

In 2011, Scottish Government published its Autism Strategy, which aims to improve the lives of the 50,000 people in Scotland with an ASD diagnosis. In addition to the £10m funding to help and support people with autism and their families, the strategy commits to a further £3.4 million investment which will be used to:

- Recruit local authority Autism Coordinators to support local authorities.
- Support the Scottish Autism Services Network in workforce capacity-building.
- Improve access social care services for people affected by autism.
- Create a development fund of £1 million per year.
- Develop new drop-in services for people with autism across Scotland.

Curriculum for Excellence

Curriculum for Excellence is the national curriculum for Scottish schools for learners from age 3 to 18. It aims to achieve a transformation in education in Scotland by providing a coherent, more flexible and enriched curriculum. The curriculum includes the totality of experiences which are planned for children and young people through their education, wherever they are being educated. It aims to develop four capacities, helping children to become:

- Successful learners
- Confident individuals
- Responsible citizens
- Effective contributors.

Developing the Young Workforce (DYW)

Developing the Young Workforce (DYW) is a seven-year programme (2014-2021) that aims to better prepare children and young people aged 3–18 for the world of work. This programme builds on the foundations already in place through Curriculum for Excellence. The main aim of DYW is to reduce youth unemployment by 40% by 2021. Education Working for All, the final report of the Commission for Developing Scotland's Young Workforce, was published in June 2014. The Government's response to this report was published in the form of the Youth Employment Strategy in December 2014. The strategy includes milestones for the seven-year programme across all sectors, challenging schools, colleges and employers to embrace the recommendations and implement the measures required to effect lasting change. Equality, inclusion and STEM subjects are highlighted as areas of importance with over a third of all key milestones relating to these areas.

3.2 Market Profile

It is difficult to accurately predict the potential market for SUSE membership and products. In 2016 SCLD carried out far reaching research into current supported employment services for their report *Mapping the Employability Landscape for People with Learning Disabilities in Scotland*. This is the closest we have come in our sector to establishing a definitive list of what is available, how much resource is devoted to supported employment services, how many people are employed and how many people are supported. Unfortunately, a number of providers did not supply full details of their services so we have to infer from the information we have what the potential market might be.

However, the introduction of Fair Start Scotland in 2018 does represent a new market for SUSE's services and allows us estimate potential demand. 4,500 people will be recruited to the Intense Strand of FSS each year and in theory up to a third of these should be offered a supported employment service. Our best estimate is that there are around 35-50 organisations in Scotland that deliver services consistent with the Supported Employment Framework, including local authorities and providers of Project Search and IPS. Around half of these providers will be current SUSE members and active in our network. There will be huge variety in the size of these organisations, their workforces and the number of people they support into work each year. There are probably only a couple of hundred supported employment practitioners in Scotland.

Also, there are potentially scores more organisations who deliver employment services of some kind for people with disabilities or long-term conditions. These may use some elements of the

supported employment model, could be statutory services such as Modern Apprenticeships or employment programmes based in education settings, social enterprises or supported businesses. There are also a huge number of services for other vulnerable groups and jobseekers that could benefit from exposure to the best practice and principles of supported employment. In addition, mainstream providers are increasingly under pressure to make their provision more accessible and open up opportunities for people with disabilities. There are therefore potentially hundreds of employability workers that could benefit from the training that SUSE (and our members) can provide and a great many organisation we can work with to build their capacity.

Membership

Based on the information in our Annual Accounts SUSE had 23 paying members in 2015 (the last full year in which membership subscriptions were collected). The highest figure we are aware of is 38 members in 2008. In addition to the subscriptions members pay they also represent our most important market for the services and products SUSE can supply. Growing the membership in the period to 2021 is therefore vital for the achievement of this plan and the sustainability of the organisations. Opportunities for growing membership include:

- 26 local authority with supported employment services; we aim to recruit the majority as members.
- The balance of 16 from 24 Fair Start Scotland providers.
- Scotland's colleges, which provide a wide range of employment related provision for people with disabilities.
- Providers of other types of employability model for disabled people in Scotland (e.g. supported businesses of which there are 24, Social Firms of which there are approximately 110, and social enterprises of which there are approximately 1,000-3,500).
- Mainstream providers, particularly those that deliver Modern Apprenticeships or the Employability Fund, of which there are approximately 326.
- Expanding our geographic reach beyond our traditional membership base in Central Scotland.

While there is some demand for an Individual Membership of SUSE we are not targeting this in our membership offer in the short-term. In the next year we will define the potential benefits for individual members and what a membership offer might look like.

Service Quality: Training, Qualifications, Quality Mark

There is an urgent need to better understand the training needs of employability practitioners in the sector and what is currently happening to address these. Anecdotal evidence suggest that training budgets have been cut and new recruits to the sector do not always benefit from structured and relevant training.

To date approximately 120-150 practitioners in Scotland have completed the Professional Development Award in Supported Employment but it is likely that many of the practitioners who have gained the award have now left the sector or no longer work in front line supported employment roles. With the introduction of Fair Start and routine staff turnover in services it is reasonable to assume that there will be a couple of hundred practitioners who would benefit from undertaking the PDA.

As noted in the Membership section of this plan there are also many organisations who are involved in supporting disabled jobseekers on the employment journey. These may be providers

of mainstream programmes or social enterprises. While these staff may not want or need the full PDA there will certainly be elements of the supported employment framework that they could be trained in. In support of this market opportunity, feedback from SUSE's member survey in 2017 indicated strong support for SUSE supporting workforce development.

In the member survey 88% of respondents also told us that their organisation would be interested in gaining a quality mark for their supported employment provision. This is particularly relevant given the inclusion of Supported Employment in the Fair Start programme specification. Members have been clear that they do not want the definition of what is supported employment to be diluted or altered and there needs to be a tool for measuring the fidelity of services to the Supported Employment Framework.

3.3 SUSE SWOT Analysis

Key implications for SUSE of its external operating environment are summarised in *Table 3.1* along with our assessment of relevant internal factors as identified by its Board and staff, and feedback from the most recent member survey. This current position for the organisation is used to inform our forward strategy.

Table 3.1:

Strengths	Weaknesses
<ol style="list-style-type: none"> 1. Experienced staff team – lobbying, relationship building, sector knowledge. 2. Core operating costs have been minimised. 3. Respected and influential membership (experts in their field). 4. Organisational governance has been significantly improved. 5. Strong understanding of the needs/deficits of the sector. 6. No competing Scottish based organisation. 7. Access to decision makers. 8. New membership offer has been well received. 	<ol style="list-style-type: none"> 1. Members have limited budgets for training/qualifications. 2. SUSE has limited resources to develop the business. 3. Membership has been historically low (and limited to supported employment providers). 4. Limited relationships with employers/business community. 5. Few Local Authorities were past members of SUSE. 6. Limited knowledge of conducting research to a high standard. 7. SUSE does not have a track record as a training organisation. 8. A number of Fair Start providers are not SUSE members. 9. Supported businesses and social enterprises have not historically engaged with SUSE in large numbers.
Opportunities	Threats
<ol style="list-style-type: none"> 1. Current lack of training provision for members to purchase. 2. Desire and need for more networking among members. 3. Sector wants an honest broker due to historic lack of co-operation among providers. 4. Potentially large audience/market for SUSE’s message. 5. Potential to grow associate memberships. 6. Scottish Government’s Disability Employment Gap Action Plan. 7. SUSE to become the voice of disability employment in Scotland. 8. Relations with Scottish Government Employability Team. 	<ol style="list-style-type: none"> 1. Some organisations in the sector may feel SUSE is not needed. 2. Limited take up of membership offer would affect our credibility/ influence and future viability. 3. Supported Employment services are reducing. 4. Lots of competition for funding. 5. Reputational damage from MTSOP lottery project. 6. Member expectations may exceed reality of what is possible. 7. UK wide organisations are now operating in Scotland (ERSA, BASE, Business Disability Forum).

4. Strategy Overview

In the past year our board and members have developed a renewed vision and mission for SUSE. These are:

4.1 Vision, Mission, Values

SUSE Vision

A Scotland where people with disadvantages have access to supported employment to find and retain paid work.

Mission

To increase the availability, quality and impact of supported employment services in Scotland.

Values

- We are led by our members
- We are inclusive
- We are a learning organisation
- We are committed to excellence
- We maintain the fidelity of the supported employment model.

4.2 Charitable Objects

Earlier in 2018 we revised SUSE's Articles of Association. These were approved at an EGM in June 2018 and have been lodged with OSCR. These defined our charitable objectives as:

- The relief of poverty and distress by working to increase the availability, quality and impact of supported employment services in Scotland by ensuring individuals with disadvantages have access to supported employment to find and retain paid work.
- Develop the supported employment workforce and the capabilities of the membership, keeping them informed, offering support and development opportunities and promote learning;
- Be the voice of the membership and establish the supported employment model as a fundamental element of employability in Scotland;
- Work with others and support the membership to work with each other, to research what works and bring people together who share the values and ambitions;
- Champion new initiatives and pilot new approaches and challenge the status quo;
- Work with the membership to improve supported employment services in Scotland, support the members to grow, promote excellence and influence policy developments.

4.3 SUSE Strategy 2018-21

In order to fulfil our vision and mission, we have identified 3 core themes for the organisation in the next 3 years.

- CONSOLIDATION of the business and our core customers.
- INCOME GENERATION from building sector capacity.
- PROGRESSION in building and maintaining the value of the supported employment model.

Consequently, we have identified 6 strategic objectives, and broad strategies for achieving these objectives.

1. **ORGANISATION: SUSE is an efficient, effective, and financially viable organisation.** We resource and manage the organisation to deliver our strategic objectives in a sustainable manner
2. **REPRESENTATION: SUSE is recognised as the lead body for supported employment and the representative body for supported employment providers, in Scotland.** We are the voice of our members, influencing policy development, and have established the supported employment model as a fundamental element of employability in Scotland.
3. **EVOLUTION: SUSE is developing the capability of our members and ability of the supported employment workforce.** We keep our members informed, support them to grow and develop, and promote learning in supported employment.
4. **TRANSFORMATION: SUSE is working with our members to improve the quality of supported employment services in Scotland.** We develop and maintain the standards of the Supported Employment model and promote excellence in supported employment service delivery.
5. **INNOVATION: SUSE is stimulating, initiating, facilitating and supporting new projects and services to ensure supported employment provision evolves to meet the changing needs of employees and employers.** We pilot new approaches and challenge the status quo, acting as the catalyst for improvement and change.
6. **COLLABORATION: SUSE is working with members and others, encouraging them to work with each other, to advance supported employment provision in Scotland.** We research what works and bring people together who share our values and ambitions.

Linked to these goals, SUSE has specified a total of 36 aims and related strategies to be achieved and implemented by 2021. Further detail of SUSE strategy is contained in *Appendix A*

SUSE has identified 14 of its strategies that it wishes to prioritise in the next 12 months. These are listed in *Appendix B* and relate to: planning and management; membership offer; income generation; standards of provision and practice; wider engagement.

5. Services and Activities

5.1 Service / Activity Portfolio

A summary of SUSE's service / activity portfolio is provided in *Table 5.1*.

Table 5.1:

Service /Activity	Target Market	Key Features	Key Benefits
Membership	Local authorities, MA providers, social enterprises, supported businesses, voluntary sector providers, support services.	2 forms of membership developed – benefits to be tailored to each potential market segment.	Grows SUSE's influence and potential market for services; Income generation.
Training	Local authorities, social enterprises, supported businesses, voluntary sector providers.	Tailored programmes adapted from existing FSS & SE courses. Brokerage for members to deliver training.	Contributes to SUSE agenda as Centre of Excellence; Income generation.
PDA	Social enterprises, supported businesses, voluntary sector providers.	Dedicated training for each purchaser, up to 30 candidates each year.	Contributes to SUSE agenda as Centre of Excellence; Income generation.
Conference	Local authorities, MA providers, social enterprises, supported businesses, voluntary sector providers, support services.	Opportunities for showcasing, promotion, networking.	Builds SUSE network and credibility; Allows us to influence policy makers.
Member Events	SUSE Members, potential members	2 thematic and 2 geographic each year.	Contributes to membership offer.
Masterclasses*	SUSE Members	Responds to identified needs as they arise.	Contributes to membership offer.
Project Brokerage	SUSE Members	Source new funding, creating consortia, testing new ideas.	SUSE leads of innovation and learning; Income generation.
Consultancy*	Social enterprises, supported businesses, voluntary sector providers	Tailored support focussed on better results and workforce development.	Contributes to SUSE agenda as Centre of Excellence; Income generation.
Evaluation/ Benchmarking*	SUSE Members	New tools developed or potential partnership with member.	Builds a resource of best practice and achievement; Income generation.
Quality Standard	SUSE Members	Dedicated tool endorsed by members and funders.	Contributes to SUSE agenda as Centre of Excellence.
Inclusive Employer Award	Employers	Delivered by members, includes dedicated training resource.	Strategic partnerships with employers.

*indicates proposed service / activity for future development

5.2 Marketing Communications

Effective marketing communications will be key if we are to achieve the goals outlined in this plan. We aim to create a network of like-minded organisations that can work together to learn, grow and influence the development of employability provision in Scotland.

In the past year we have created a new logo for SUSE and have established branding that is used in all of our communications including member bulletins and emails. The new branding is used across the SUSE website that was launched in July 2018.

In the next 3 years we will grow our trading income, promote supported employment and establish SUSE as an influential organisation. The marketing communications that will support this include:

- We will carry out direct marketing to current members for events, training opportunities and our annual conference. This will mainly through the website, LinkedIn, Twitter and email.
- SUSE will maintain a high profile presence on social media, particularly Twitter and LinkedIn. We have 500 followers and will grow this in the years ahead.
- Our new Social Media Strategy (developed by Third Sector Lab) has built our capacity and given us new approaches. We are better able to develop engaging on-line materials which capture attention and spread our message.
- We will publish blogs and think pieces on social media and we will encourage our members to do likewise on our behalf.
- SUSE will host an annual conference for our members and interested stakeholders. We will reserve a number of places at each event for organisations that we wish to encourage to take up membership or work with us going forward.
- We will respond to consultations and ensure our comments are publicised. This will include developing the capacity to issue press releases (or working with members to do so).
- SUSE will participate in selected conferences and events to publicise our organisation and promote our work e.g. the SCVO Gathering. These are invaluable marketing and networking opportunities.
- In the Membership section of this plan we have identified various targets to grow our membership (e.g. social enterprises, Modern Apprenticeship providers). We will develop a plan to promote SUSE to these organisations. If possible we will attempt to work with partner organisations such as Social Firms Scotland and the Scottish Training Federation.

5.3 Service / Activity Projections

SUSE forecasts significant growth in its generated income from implementation of its business strategies. The focus over the next 3 years will be on growing membership volume and income, training and PDA delivery, and the introduction of new quality standard and consultancy products. We anticipate that growing the membership of SUSE will create a virtuous circle by increasing our market for training and the PDA.

While SUSE's annual conference, masterclasses and member events will be expected to at least break even or perhaps make a small net financial contribution, their primary purpose is to raise and maintain SUSE's profile and provide member value. As such, the income from these services/activities will remain relatively flat for the period of this plan. SUSE also anticipates generating project management fees from the management of funded projects but this income is included as grant-funding in Section 7.

6. Management and Resources

6.1 Legal Structure and Governance

Incorporated in 2000, SUSE is a Company Limited by Guarantee and registered as a Scottish Charity with OSCR (Office of Scottish Charity Regulator). Company membership is open to:

- Full members: organisations who deliver supported employment or employability services
- Associate members: organisations who have an interest in supported employment and support the aims of SUSE, but also who may not deliver employability services directly

The management of the company is the responsibility of its Board of Trustees (who are also directors for the purposes of company law) who are elected by members or co-opted by the Board for their expertise under the terms of its Articles of Association. In the past year SUSE has revised its Articles to ensure they are fit for purpose going forward. It has also been actively recruiting new trustees as part of a wider modernisation of SUSE. The Articles allow for 6-10 trustees, the majority of whom must be member directors, and SUSE currently has two vacancies. Its trustees are:

- Jamie Rutherford (Chair), Director of Employment, ENABLE Scotland
- Ian Bruce (Vice Chair), NTO Equality Manager, Skills Development Scotland
- Andrew Strong, (Treasurer), Assistant Director (Policy & Communications), Health & Social Care Alliance Scotland
- Carol Montgomery, Head of Hansel 3e, Hansel Alliance
- Angela Hamilton, Team Manager, Fife Council Employment Service
- Stephen Black, Head of operations, Momentum Scotland
- Ashley McCloy, Business Development Manager, Enterprise Mentoring
- Michelle Fisher, Employability Officer, Inclusion Scotland

The Board governs the organisation in accordance with its Articles in order to achieve its charitable purposes, as stated in Section 4. The Board has the power to delegate to sub-committees to implement policy and strategy; day-to-day strategic and operational management of the organisation is the responsibility of its Chief Executive Officer.

6.2 Risk Management

The trustees identify and review the risks to which the charity is exposed and ensure appropriate controls are in place to provide reasonable assurance against fraud and error. The trustees have a risk management strategy which comprises:

- An annual review of the risks the charity may face
- The establishment of systems and procedures to mitigate those risks identified
- The implementation of procedures designed to minimise any potential impact on the charity should any of these risks materialise
- All necessary insurance cover is in place

An overview of SUSE's risk assessment for the life of this business plan is in *Section 8*.

6.3 Organisational Performance Management

In order to monitor and evaluate business performance SUSE has identified 12 Key Performance Indicators for which it has set targets for the next 12 months. These are summarised in *Table 6.1*. KPI performance will be reported to the Board at its quarterly meetings; supporting performance indicators will be used to support operational activity.

Table 6.1:

Strategic Objective	KPI (Measure)	Target	Measurement Tool
1. Organisation	a. Total income (as agreed by the SUSE board) b. Grant funded project Outputs (e.g. Workforce Equality Fund) c. Surplus / deficit	a. £73,800 in 2019/20 ⁽¹⁾ b. On Plan c. With 5% of forecast.	a. Quarterly income / expenditure reports b. Funder reports c. Quarterly financial forecast update
2. Representation	d. Awareness/ knowledge of target audience of supported employment and SUSE e. No. of unique organisations engaged f. Penetration of employability organisations g. No. of members	d. Baseline plus 10% e. 150 annually f. 15% of 1500 orgs annually. g. 70 in 2020/21	d. Brand awareness sample of OSCR database ⁽²⁾ e. CRM system ⁽³⁾ f. CRM system ⁽³⁾ g. CRM system ⁽³⁾
3. Evolution	h. Member satisfaction i. No. of services/ activities, piloted/ launched in a 12-month period	h. 75% i. 3 annually	h. Annual member survey / event feedback i. CEO board report.
4. Transformation	j. Uptake of supported employment quality standard	j. 4 in 2020/21.	j. CRM system ⁽³⁾
5. Innovation	k. No. of project challenge competitions	k. 2	k. Project Specifications
6. Collaboration	l. No. of Active Partners (e.g. project delivery)	l. 6	l. Partnership Agreements

Notes

(1) to be agreed with the board.

(2) we may look at another measure of this.

(3) we will look at a CRM system, but currently use Excel

6.4 Management and Staffing

SUSE’s organisational structure is illustrated in *Figure 6.2*, while *Table 6.3* provides details of its current and proposed workforce.

Figure 6.2:

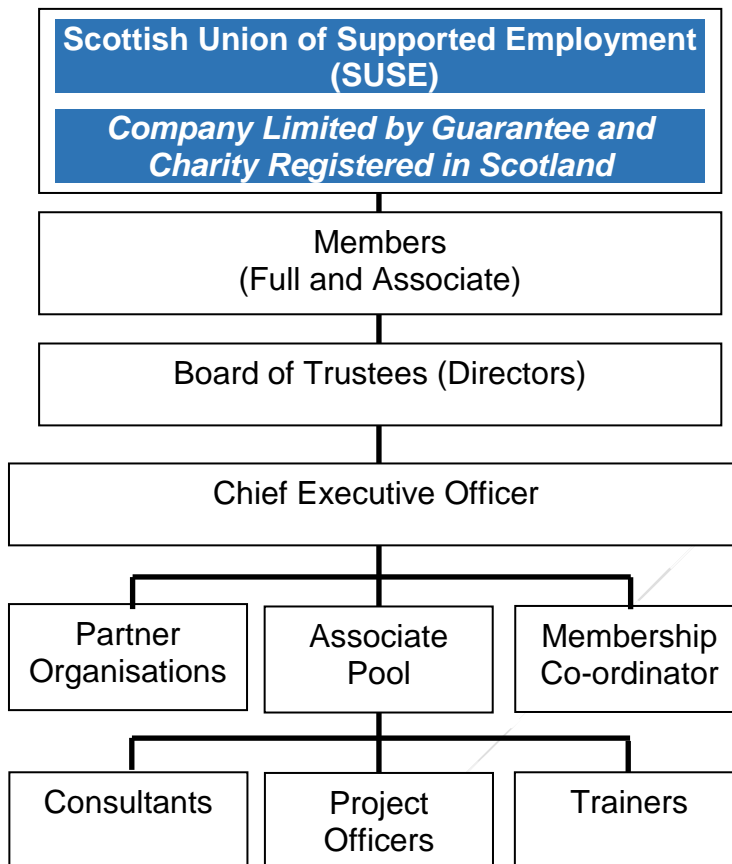


Table 6.3:

Job Role	Number	Hours/week	Key Functions
Chief Executive Officer	1	21	Overall responsibility for strategic and operational management of the company; strategy planning and implementation; business development; project development; income generation; financial management; managing and coaching staff; agreeing and monitoring work plans; liaison with partners and suppliers; overseeing reporting and evidence gathering; leading on dissemination.
Membership Coordinator	1	21	Company governance and administration including record keeping, evidence and data gathering and collation; member and event administration and communications; social media and website co-ordination, organising dissemination; supplier liaison.
Consultancy / Sessional	TBC	TBC	SUSE will not increase the number of permanent staff in the next 3 years but may recruit consultants and staff on limited term contracts when this is necessary (and funding has been identified). This is not included in financial projections at this time.

6.5 Learning and Development

A range of skills, experience and qualifications is required in order for SUSE to operate as an efficient and effective organisation. On appointment, Trustees receive information on roles and responsibilities from the OSCR website detailing the legal and financial obligations required of all Trustees. Each new trustee meets with the Chair and project staff to learn about SUSE. If appropriate Board members also undergo external training to ensure all standards of service are achieved. SUSE supports its staff to develop in line with the professional and technical standards for their role and the needs of the organisation. It carries out regular performance appraisals to include a skills assessment and training needs analysis.

6.6 Other Resources

SUSE does not have its own premises as we have a small staff team and can rent meeting or training rooms as we need them. Our permanent address is Deafblind Scotland, 1 Neasham Drive, Kirkintilloch, East Dunbartonshire, G66 3FA. We have a dedicated phone number for members. We have access to 2 desks at Deafblind's offices.

We have a small amount of equipment - each staff member has a PC and we own 2 laptops. The Membership Co-ordinator has a company mobile phone.

There are no staff vehicles. Staff use their own cars and submit monthly expense claims.

6.7 Key Systems and Processes

SUSE has developed extensive financial protocols that meet best practice standards. These have been reviewed and agreed with our accountants. We use the SAGE accounting system.

- An approved suppliers list is maintained.
- SUSE's payroll is administered by SCVO.
- Our website is hosted and maintained by Cole AD.
- A company Risk Register is updated quarterly.
- Appropriate systems are maintained for operations and HR such as holiday and sick leave records.

The SUSE Board meets quarterly. The board receive a number of regular reports at these meetings:

- CEO Report
- Membership update
- Quarterly finance report
- Risk Register

6.8 Key Partners / Suppliers

There are a number of supply and project partners key to the successful operation of the organisation. These are listed in *Table 6.4* along with a brief description of the nature of the partner relationship.

Table 6.4:

Key Suppliers/ Partners	Relationship
Brett Nicholls Associates	Accountancy services, annual accounts, quarterly finance review.
Senscot Legal	Legal services
Cole AD	Website hosting, maintenance and development.
SCVO	Administration of monthly payroll.
Verus HR	Ad-hoc human resources advice and support.
Deafblind Scotland	Premises
Lugo	IT support
Stewart Financial Services / Scottish Widows	Management / supply of staff pensions
Canada Life	Group life insurance

7. Finance

7.1 Financial Performance

A summary of SUSE's financial performance in the last 3 years is provided in *Table 7.1*.

The income / expenditure noted below reflects the increasing activity carried out in the Big Lottery *More than the Sum of the Parts* and *Access to Employment* SDS projects. SUSE was able to build up its reserves during this period as we completed all of the project elements and drew down management fees.

Table 7.1:

Financial Year	March 2016	March 2017	March 2018
Unrestricted Income	£3,020	£271	£27,232
Restricted Income	£227,339	£158,395	£316,446
Total Income	£230,359	£158,666	£343,678
Staffing Costs	£53,161	£70,705	£118,214
All Other Expenditure	£125,923	£126,370	£107,956
Total Expenditure	£179,084	£197,075	£226,170
Surplus/ Deficit	£51,275	-£38,409	£117,508
Total Funds	£114,422	£76,013	£193,521
Unrestricted Funds	£5,143	£15,980	£81,367

7.2 Financial Projection

The Trustees have agreed that SUSE will maintain reserved equivalent to 3 months of operating costs. The business plan is intended to bring SUSE to a break even position in 2021/22.

7.3 Sources of Income

The comparatively high level of grant-funding projected for 2018-19 reflects the tail-end of SUSE's BLF project. From 2019 onwards we are seeking core funding. This core funding is also forecast to continue annually at a similar level for the duration of this business plan. At the same time, SUSE will seek opportunities to bid for grant-funding for relevant projects within which it will seek an appropriate project management fee as a contribution to overheads.

The value of generated income is as that previously described in greater detail in *Section 5*. Over the course of this business plan SUSE will work to change the proportion of total income from trading from 12% to 68% through implementation of its business strategies and this will become SUSE's primary source of income in the long-term. While this is a significant increase in trading income it should be borne in mind that BLF funding has been the main source of funds for SUSE in recent years and no emphasis was given to generating income from trading in this time.

While no income from donations is forecast SUSE will explore opportunities for this as and when they arise (e.g. corporate fundraising for specific projects such as the Inclusive Employer Award).

Going forward SUSE will look to secure core funding either from a grants or trusts. We have not included any assumptions about this potential income in our projections.

7.4 Key Expenditure

Our aim will be to ensure that core costs are kept to a minimum. The annual running costs for the charity with the current staffing structure is in the region of £71,500. This includes member events and premises, but not the annual conference which will be cost neutral.

There will be additional costs for online licenses, services such as payroll and accountancy; pensions and insurance. These will rise in line with inflation over the 3 year period. There will be no website hosting or maintenance costs until 2020.

8. Business Risk Assessment

The Trustees have assessed the major risks to which the company is exposed, in particular those related to the operations and finances of the company and are satisfied that systems and procedures are in place to mitigate SUSE's exposure to the major risks. This is summarised in *Table 8.1*.

Table 8.1:

Risk	Status	Consequences	Mitigating/Forward Actions
1. Failure to secure core funding	Medium	More staff time devoted to income generation and delivery.	Business Plan will not fail because of this but it makes alternative trading income more vital.
2. Quality Standard not taken up by sector	Medium	Damage to reputation. SE Framework would be undermined.	Members to be fully involved / consulted about development process – early Adopters to be identified.
3. Grant funding not secured at expected volume	High	SUSE has less value to members. SUSE is not sustainable.	High volume of applications following extensive research to identify likely funders.
4. No demand for SUSE training	Medium	Negative impact on income targets. Plans for a Centre of Excellence will not be achieved.	Marketing to potential purchasers, gather testimonies with positive feedback. Promote at conferences and events.
5. SUSE is unable to deliver the PDA	High	Major impact on income targets. Plans for a Centre of Excellence will not be achieved.	Develop relationship with appropriate partner for assessment centre services. Have contingency if member org cannot work with us.
6. Low take up of membership – SUSE does not attract members beyond core group.	High	SUSE is not as influential as we need it to be. Small marketplace for our services.	Extensive marketing beyond supported employment providers, target social enterprises and mainstream providers.
7. Failure to comply with GDPR	Medium	Potential prosecution, loss of member and funder confidence.	Systems are in place, need to ensure these are adhered to as the organisation grows. Look at purchasing a CRM programme.
8. Membership offer / delivery does not meet expectations.	Low	Damage to reputation, gradual drop off in memberships.	Good communication with members to inform of activities, provide opportunities to get involved.
9. No demand for consultancy, evaluation services.	Medium	Negative impact on income targets. Plans for a Centre of Excellence will not be achieved.	Marketing to potential purchasers, gather testimonies with positive feedback. Promote at conferences and events.

Appendices

Appendix A: SUSE 3-Year Strategy

Appendix B: Prioritised Strategies for Year 1

Appendix A

SUSE 3-Year Strategy

SUSE Strategy 2018-21						
Vision	A Scotland where people with disadvantages have access to supported employment to find and retain paid work.					
Mission	To increase the availability, quality and impact of supported employment services in Scotland.					
Values	Led by our members; Inclusive; A learning organisation; Committed to excellence; Maintain the fidelity of the supported employment model.					
Objectives	CONSOLIDATION		INCOME GENERATION		PROGRESSION	
	Organisation	Representation	Evolution	Transformation	Innovation	
	<p>1. SUSE is an efficient, effective, and financially viable organisation.</p> <p>We resource and manage the organisation to deliver our strategic objectives in a sustainable manner</p>	<p>2. SUSE is recognised as the lead body for supported employment and the representative body for supported employment providers, in Scotland.</p> <p>We are the voice of our members, influencing policy development, and have established the supported employment model as a fundamental element of employability in Scotland.</p>	<p>3. SUSE is developing the capability of our members and ability of the supported employment workforce.</p> <p>We keep our members informed, support them to grow and develop, and promote learning in supported employment.</p>	<p>4. SUSE is working with our members to improve the quality of supported employment services in Scotland.</p> <p>We develop and maintain the standards of the Supported Employment model and promote excellence in supported employment service delivery.</p>	<p>5. SUSE is stimulating, initiating, facilitating and supporting new projects and services to ensure supported employment provision evolves to meet the changing needs of employees and employers.</p> <p>We pilot new approaches and challenge the status quo, acting as the catalyst for improvement and change.</p>	<p>6. SUSE is working with members and others, encouraging them to work with each other, to advance supported employment provision in Scotland.</p> <p>We research what works and bring people together who share our values and ambitions.</p>
Aims	<ul style="list-style-type: none"> a. Secure a significant volume of member organisations from across Scotland. b. Operate a balanced delivery model of staff and associates, supported by appropriate processes and systems. c. Maintain a robust governance infrastructure including a board of expert and experienced directors. d. Deliver a high-quality member service and achieve increased member satisfaction year on year. e. Achieve financial breakeven on SUSE annual conference. f. Generate an annual operating surplus and maintain an appropriate level of financial reserves. g. Manage SUSE's business risks. 	<ul style="list-style-type: none"> a. Position SUSE as the representative body for supported employment providers, providing channels to policy influencers and decision-makers b. Increase awareness and understanding of the role of the Supported Employment model in the employability landscape c. Establish evidence for supported employment practice and impact d. Gain recognition and endorsement for the supported employment model by leading Scottish employers. e. Establish SUSE as an effective campaigning organisation 	<ul style="list-style-type: none"> a. Provide regular high-quality advice and information for our members. b. Establish SUSE as the learning organisation for supported employment in Scotland, enabling continuous improvement for providers and practitioners. c. Lead on workforce development for the supported employment sector. d. Establish the SUSE website as a learning hub for supported employment practitioners. e. Provide the necessary support for practitioners to achieve recognised qualifications. 	<ul style="list-style-type: none"> a. Establish a Quality Standard for supported employment services in Scotland. b. Increase the number of supported employment service providers in Scotland working to an accredited quality standard. c. Enable supported employment practitioners to become and remain accredited employability professionals. d. Establish SUSE as the professional body for supported employment practitioners. e. Establish SUSE as the Centre of Excellence for supported employment in Scotland. 	<ul style="list-style-type: none"> a. Develop the Supported Employment model for people in high-value jobs b. Establish the transferability of the Supported Employment model and support its replication to other beneficiary groups c. Facilitate pilot projects with our members that improve supported employment practice outcomes and impact d. Support replication of good practice models and services e. Incubate new supported employment services for adoption and development by others f. Anticipate future changes in the labour market and the implications for supported employment 	<ul style="list-style-type: none"> a. Develop and maintain channels for members to communicate, cooperate and collaborate b. Identify contract and project opportunities for members, partnerships and consortia c. Stimulate and facilitate opportunities for service co-design and co-production d. Support our members to develop partnerships and consortia. e. Increase the volume of funders and commissioners engaging with partnerships and consortia
	Strategies	<ul style="list-style-type: none"> 1. Produce and update a rolling 3-year strategy and annual plan 2. Regularly gather information and feedback from members and stakeholders, to share and to inform continuous improvement 3. Maintain financial reserves equivalent to 3 months operating costs 4. Conduct annual SUSE member survey 5. Regularly review and plan to address its business risks 6. Develop and deliver an employability evaluation and benchmarking service (e.g. supported employment in FSS) 7. Develop a business case for SG core funding 	<ul style="list-style-type: none"> 1. Conduct and commission research into supported employment (e.g. integration) with appropriate partners (e.g. EUSE, BASE, University) 2. Lead or participate in marketing communication campaigns for Supported Employment 3. Establish and maintain relationships with leading employers in Scotland via employer networks, SUSE members, and the Inclusive Workplaces Award 4. Host an annual SUSE conference 5. Offer a paid-for membership product across a range of categories 6. Produce member/ SUSE value reports 7. Effectively campaign on Supported Employment to Scottish Government, Local Authorities and funders. 	<ul style="list-style-type: none"> 1. Distribute regular bulletins and updates 2. Host member events 3. Review members' workforce development needs 4. Develop and deliver proprietary training in Supported Employment 5. Establish and manage a learning hub on the SUSE website 6. Identify and promote the take-up of relevant qualifications that enhance supported employment practice 	<ul style="list-style-type: none"> 1. Establish and promote a quality standard for Supported Employment organisations. 2. Maintain the PDA in Supported Employment. 3. Work with Scottish Government to ensure the quality of Supported Employment provision in the Fair Start programme. 4. Engage with SSSC on supported employment being recognised as qualifying CPD 5. Work with clients and representative organisation to improve supported employment services. 	<ul style="list-style-type: none"> 1. Develop pilot projects with SUSE members (e.g. linked to integration agenda) 2. Map supported employment model against growth labour markets (e.g. childcare, energy efficiency) 3. Adapt and further develop, existing ideas and products (e.g. Project Search) 4. Design and manage a new service development 'challenge' competition 5. Share across the employability sector, learning and knowledge from pilots and existing service delivery 6. Write and disseminate 'think pieces' on supported employment innovation and application

Appendix B

Prioritised Strategies for Year 1

- **Planning and Management**

- 1.1 Produce and update a rolling 3-year strategy and annual plan
- 1.5 Regularly review and plan to address its business risks

- **Membership Offer**

- 2.4 Host an annual SUSE conference
- 2.5 Offer a paid-for membership product across a range of categories
- 3.1 Distribute regular bulletins and updates
- 3.2 Host member events
- 5.4 Design and manage a new service development 'challenge' competition.

- **Income Generation**

- 1.7 Develop a business case for SG core funding
- 3.4 Develop and deliver proprietary training in Supported Employment

- **Standards of Provision and Practice**

- 3.3 Review members' workforce development needs
- 4.1 Establish and promote a quality standard for Supported Employment organisations.
- 4.3 Work with Scottish Government to ensure the quality of Supported Employment provision in the Fair Start programme.

- **Wider Engagement**

- 6.1 Effectively engage with SLAED and Local Authority supported employment providers
- 6.4 Participate in larger public and third sector networks (e.g. Senscot, Social Firms Scotland)