



Milton Keynes Reader Service Business Plan

This business plan covers the 24-month period from 1 April 2017 to 31 March 2019. General information about the Milton Keynes Reader Service is available on the website (www.miltonkeynesreaderservice.org.uk) and in the Reader Service's annual reports and accounts which are also available on the Reader Service's and the Charity Commission's websites (www.gov.uk/government/organisations/charity-commission).

2. The business plan is structured into 5 sections:

- Section 1 – service delivery. A description of objectives, activities and targets associated with further development of the Reader Service's 'outward facing' work in supporting service users
- Section 2 – charity management. A description of objectives, activities and targets associated with the management of the Reader Service in order that it can deliver its outward facing work
- Section 3 – prioritisation. Those activities which should be prioritised should insufficient resources be available for all activities within the business plan
- Section 4 – risks. The key risks facing the Reader Service and the mitigating actions it should take

- Section 5 – delivery plan. A full list of activities set out in the business plan with responsibilities for leading the activities.

3. The business plan does not focus on the activities associated with the ‘day-to-day’ running of the Reader Service. However, it should be noted that those are the activities that consume the majority of its resources and deliver most benefit to service users. This is because the Reader Service is a long-established and successful charity with mature and proven business processes. The plan is focused on those additional activities needed to develop the level of service offered by the Reader Service and to respond to new challenges.

SECTION 1 - SERVICE DELIVERY

Services provided

4. The Reader Service should remain focussed on the current set of services it delivers i.e. assistance with reading/writing, shop & see and facilitation. There is no evidence that service users are asking for any other services, though this may be reviewed following some suggested work to look at the needs of potential service users who are younger adults and from black & minority ethnic (BAME) groups.

5. The Reader Service’s current policy of not assisting service users with medical visits will be retained.

Service Users

6. The number of service users is around 110, an increase of 100% over the last five years. The number is not static given that the majority of service users are elderly and the Reader Service has a constant flow of referrals.

7. The assessment of the Reader Service's qualitative impact is overwhelmingly positive as evidenced by surveys of service users, ongoing feedback from them and volunteers and the successful long-term nature of the relationships the Reader Service fosters between individual service users and volunteers which often last for many years. The Reader Service is mainly demand-led in that it responds to individual requests for assistance or to referrals from third parties such as social services.

8. However, the Reader Service lacks any objective insight into the quantitative impact it has on visually impaired and other disabled groups in Milton Keynes. It should therefore determine its quantitative impact by obtaining a better understanding of:

- the number of visually impaired people in Milton Keynes who might benefit from its services
- the segmentation of potential and current service users by age and ethnicity.

9. As a starting point, the Reader Service should use the RNIB Sight Loss Data Tool which provides data at a local authority level on the number of people registered blind or with severe visual impairment. It also provides other useful

data to assess trends such as the number of people from Milton Keynes who attend diabetic retinopathy screening.

10. Having conducted this analysis, the Reader Service needs to examine the effectiveness of current approaches to increase the overall number of service users. If necessary it will need to develop new approaches to increase numbers and to better reflect the age and ethnicity mix of service users to match the general population of potential service users.

11. The Reader Service should aim to have sent leaflets about its services and volunteering opportunities to all GP surgeries, opticians, sheltered housing and libraries in Milton Keynes by the end of Q3 2017 and possibly to all FE colleges by the end of Q4 2017 to improve its contact with young adults. Initial contact with Visually Impaired Children Taking Action (VICTA) (www.victa.org.uk) indicates that young visually impaired adults, being in general more technically adept than older people, have less of a need of a reading service though may still need assistance with on-line form-filling and e-commerce transactions. The Reader Service should build a relationship with VICTA to gain a better insight into the needs of young adults and develop plans to help meet them if the Reader Service judges this is within its capabilities.

12. The Reader Service should approach Milton Keynes Council for assistance in identifying how best to reach potential service users from black and minority ethnic groups. Given that the Council remains the Reader Service's principal funder, this could be an opportunity to remind the Council of the Reader Service's work by a letter to the leader of the

Council asking for assistance in reaching BAME groups given that they will have obligations to do so for Council services in general.

13. The Reader Service can link any contacts with young adult and BAME groups to its Talks Project programme.

Other users/customers

14. The Reader Service has long-established relationships with the Ambassador Theatre Group and Northampton Derngate Theatre to produce audio recordings of theatre programmes. These provided revenue of £2,274 over the last 12 months. The Reader Service should look at whether other local theatres/venues would also use these services such as The Stables, the Church of Christ the Cornerstone (for their concert programme) and perhaps local cinemas. Also as the Ambassador Theatre Group operates nationwide, there may be opportunities to provide the service for other areas served by the Group.

15. The Milton Keynes Museum may also be another potential user of both audio description and Braille services.

16. Following the introduction of NHS Accessible Information Standards, there may also be a need for recording and Braille services by Milton Keynes hospital and GP surgeries. The Reader Service should follow up its awareness raising at GP surgeries to attract new service users and volunteers with an offer to assist their compliance with the standards if they are willing to pay for services.

Volunteers

17. The Reader Service's services are mainly delivered via trained, security-cleared, unpaid volunteers and this will continue to be the operating model. The activities associated with recruitment, training, placement and on-going management of volunteers are not included in this business plan but consume a significant level of the Reader Service's resources.

18. The Reader Service has continued broadly to match volunteers to service user demands though there have been occasional periods where there have been waiting lists of either service users needing a volunteer or volunteers needing to be placed with service users. The Reader Service continues to conduct awareness raising activities to attract more volunteers. The Management Committee will need to ensure that the Reader Service can meet the demands of an increasing, and perhaps more diverse, number of service users. The use of two leaflets – 'how can we help' (aimed at potential service users and their carers) & 'how can you help us' (aimed at potential volunteers) should continue. No specific new activities in addition to the Reader Service's business-as-usual volunteer recruitment activities are envisaged in this business plan. It should be noted that a grant was secured to support the recruitment of 50 additional volunteers over the last two financial years. That target was met.

SECTION 2 – CHARITY MANAGEMENT

19. This section of the plan focuses on the management activities necessary to support the delivery of the Reader Service's services.

The Role of the Service Co-ordinator

20. The Reader Service has one paid member of staff (the Service Co-ordinator) contracted to work for 110 hours per month. Workload has increased considerably due to the need for more networking and to manage the increase in the number of service users & volunteers. The Reader Service is highly dependent on the Service Co-ordinator for its successful running. This is almost inevitable in the case of a small charity like the Reader Service. The desire to go beyond the recent doubling of the number of service users & volunteers will increase the risks to maintaining service quality if the Reader Service's resources does not match the demand for its services.

21. The Service Co-ordinator regularly works more than the contracted hours. The Reader Service should continue to pay the Service Co-ordinator in line with National Joint Council rates but rather than look to increase the number of contracted hours, the Management Committee should look to ways of reducing the burden on the Service Co-ordinator which currently results in the working of excessive hours. This should include:

- Establishing another part-time paid role. While some volunteers assist the Service Co-ordinator in administrative tasks, the employment of another member of staff would

provide a predictable level and type of support for the Service Co-ordinator which the current arrangements lack. It would also provide the Reader Service with some resilience should the Service Co-ordinator be unable to work the contracted hours and help with succession planning in the longer term. However, this would have cost implications at a time when the Reader Service is facing a significant increase in the cost of its office accommodation. The Management Committee should consider the cost implications first and subject to this analysis aim to have another part-time member of staff in post by the end of the 2017-18 financial year at the latest. The role should initially be offered on a fixed term basis of 12 months to limit the Reader Service's financial exposure and also to assess the effectiveness of the arrangement. This should be done after 6 and 9 months with a view to deciding whether to continue with either a rolling fixed term contract or permanent appointment or to discontinue the arrangement.

- More specific involvement of trustees and members of the Management Committee in delivering the business plan. Trustees and other Management Committee members need to take responsibility for leading and assisting the Service Co-ordinator for the delivery of specific areas of the business plan. It is recommended that the Management Committee formalises the concept of 'lead Management Committee members/trustees' for some of the activities in the business plan – particularly those relating to management of the charity. This would leave the Chair and the Service Co-

ordinator to take the lead on the more outward facing delivery and promotion of the Reader Service.

Funding

22. The Reader Service continues to be heavily dependent on Milton Keynes Council for a significant proportion of its funding, though this has reduced in recent years from around 50% to 30% in 2016-17. This has primarily been due to securing additional grants from third parties - both commercial and charitable, though these are often linked to specific activities such as volunteer recruitment. Other grant awarding bodies often only consider 'one-off' or capital projects rather than contributions to running costs. For an established charity like the Reader Service where the vast majority of expenditure covers running costs associated with service delivery this presents challenges.

23. Sources of increased funding which should be investigated include:

- Seeking more paid work for recording and Braille as discussed in paragraphs 14-16
- Grant applications – two successful grants per annum attracting ~ £3,000 p.a. in total should be a realistic target
- Corporate support – the Reader Service should be approaching Milton Keynes based businesses using its local delivery of services as a key selling point. In the past, the Reader Service has relied on ad hoc referrals based on the

knowledge of individual volunteers and others about likely sources of support.

24. The Management Committee should nominate two 'lead trustees' to submit more grant applications to attract ~£3,000 p.a. and to approach local businesses for support and sponsorship of ~ £2,000 p.a. This should sit alongside increasing the level of paid work for theatres and other potential users of recording and Braille services which should be part of the Service Co-ordinator's role. The Reader Service should seek to increase revenue from these sources by ~ £1,000 p.a.

25. The Reader Service should also put itself forward as a candidate to be the Mayor's Charity in the future. This should both attract potential service users and volunteers but also provide access to other sources of funding.

Premises

26. The Reader Service has moved to new premises in Margaret Powell House which are of much better quality than the previous office in Tinkers Bridge. This will also make it easier to build working relationships with other voluntary sector contacts in Milton Keynes who are also based there. This makes the need for additional funding an even higher priority. The Management Committee should accept the potential hit on the Reader Service's financial reserves if plans to increase funding are not as successful as they need to be in the short term. The Management Committee should review the financial position by the end of Q4 2017 and look

at options for reducing the Reader Service's running costs if necessary.

Walnut Tree Charity Shop

27. The Charity Shop is the Reader Service's second largest source of income. The shareholding of the shop is being reformed such that the Reader Service, as a charitable incorporated organisation, will hold one third of the shares in the company which runs the shop; Rethink (the other charity supported by the shop) will also hold one-third of the shares and the remaining third will be held by an independent director. This should minimise the risk that the shop may no longer support the Reader Service. The Reader Service, of course, continues to rely on the shop generating sufficient income to support the Reader Service at current levels.

Trustees/Management Committee members

28. Following the July 2017 Annual General Meeting, the Management Committee should review the experience and expertise of its members and explore options for bringing in fresh expertise such as approaching the Milton Keynes Chamber of Commerce. However, the Reader Service should maintain its policy of having a majority of elected trustees who are service users.

Policies

29. A lot of work has been undertaken to review and update the Reader Service's policies recently. There should be a 'light touch' review of policies by the end of the 2017-18

financial year to identify any policies which need to be amended. This review should be the responsibility of the Chair and the Service Co-ordinator but drawing up any new or amended policies identified by the review should be undertaken by a trustee/Management Committee member.

SECTION 3 - PRIORITISATION

30. The three most important activities set out in this business plan and therefore the ones that should be prioritised if resources are not available for all activities are:

- Submission of more grant applications
- Approaches for corporate sponsorship/support
- Recruitment of a second employee

SECTION 4 - RISKS

31. Given the Reader Service's size, a formal, comprehensive risk register listing the impact, probability and proximity of risks and mitigation actions along with an issues register for risks which have materialised is not considered necessary. However, it is worth noting those that the Management Committee does consider to be the most important risks:

- Loss of a major funding source – Milton Keynes Council and/or Walnut Tree Charity Shop. These would be high impact but are judged low probability at the moment. The principal mitigating actions are to maintain close liaison with the Council and key councillors, for the Reader Service to take formal ownership of one-third of the shares in the

company which runs the Charity Shop, establish other sources of funding and, by the end of Q4 2017, to have developed an orderly wind-up plan for the Reader Service should the worst happen that seeks to protect existing service users and volunteers as best as possible.

- Sudden/unplanned loss of the Service Co-ordinator – this is assessed as high impact but low probability. Recruitment of a second member of staff should help to mitigate the consequences of losing the Service Co-ordinator at short notice, however as noted elsewhere in the business plan this is not the primary reason for recruiting a second member of staff.
- Failure to match operating costs with revenue – high likelihood and medium impact. The Reader Service has sufficient financial reserves to cushion the financial impact of the move to Margaret Powell House in the medium term (over the next 3 years) if current sources of funding are maintained. However, if plans to increase funding are not successful the Management Committee will need to look at options for reducing costs.
- Failure to meet demand for services – medium likelihood, medium impact. The Reader Service has been successful in maintaining a sufficient stock of volunteers for service users

and no specific mitigating actions outside of the normal running of the charity are needed to manage this risk.

- Serious problem with a service user/volunteer – low likelihood, medium-to-high impact. No specific mitigating actions outside of the normal processes in place for running the charity – volunteer training & vetting, careful placement of service users & volunteers and monitoring of their relationships - are needed to manage this risk.

SECTION 5 - Delivery Plan

NB – Lead responsibilities are just suggestions at this stage and should be agreed by the Management Committee. ‘tbc’ is used where no lead responsibility has currently been identified.

Service Delivery

32. Better understanding of potential scale of the service user base

- Use RNIB Sight Loss Data Tool to update knowledge of the size and segmentation of the service user base (SH & tbc).

33. Increasing the number of service users and volunteers and increasing the proportion of service users who are young adults and from BAME groups

- Approach Milton Keynes Council to identify any champions for young adult and BAME residents and discuss

with them ways of engaging with these groups e.g. through the Talks Project

- Depending on the outcome of the above activity and Management Committee deliberation, develop engagement plans and monitor effect on number and type of service users
- Approach other potential users of recording and Braille services (tbc).
- Approach GP surgeries by end of Q4 2017 about helping them to comply with NHS Accessible Information Standards
- Young adults needs assessment by end of financial year
- Review impact by end of financial year and draw up specific follow on plans for the 2018/19 financial year (tbc).
- Survey new volunteers and service users on how they learned about our service – to be done as part of volunteer training and service user placement and review findings by end of financial year
- To have between 125-150 service users and volunteers by end of Q1 2019.

Charity Management

Second staff member

- Second staff member to be in post by the end of the 2017-18 financial year at the latest
- First review of arrangements six months after appointment

- Second review of arrangements nine months after appointment and Management Committee decision on future of the role

Funding

- Approach at least 5 companies/organisations which might be potential customers for recording and Braille services by end of Q4 2017
- Review of grant funding opportunities by end Q2 2017
- One grant application submitted by end of Q3 2017 with up to a further four by end of Q4 2017
- Review of progress by end of 2017-18 financial year
- Review of corporate sponsorship/support opportunities by end Q1 2018 to include specific actions to be undertaken in the 2018-19 financial year (tbc).
- Submit application to be Mayor's Charity by end of Q4 2017

Walnut Tree Charity Shop

- Register share in the shop with the Reader Service by Q3 2017

Trustees/Management Committee members

- Allocate 'lead trustees' for business plan delivery by August 2017

- Review trustees/Management Committee membership by end of Q4 2017
- Depending on the review, identify potential candidates to supplement the members of the Management Committee or training opportunities for existing members by the end of Q1 2018 Policies
- Conduct 'light touch' review of policies by the end of Q1 2018 Other
- Prepare an orderly wind-up plan in the event of a major loss of funding by end Q4 2017