

Energise: Advance

An online tool to help you manage your governance and compliance activity

Built around a model of transparency and continual improvement, it allows everyone in your organisation to actively engage with improvement.

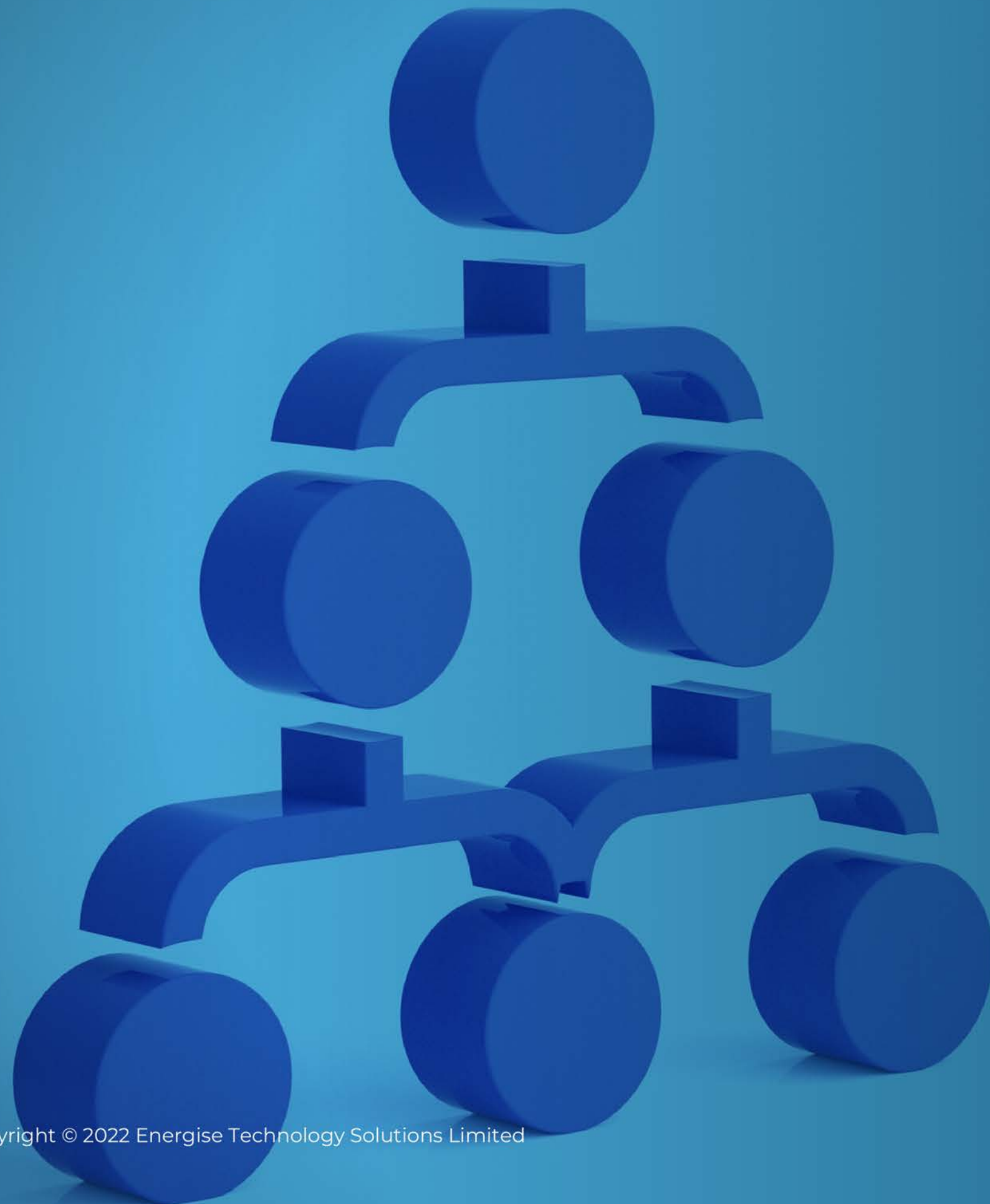


Organisational quality

At Energise, we see compliance and governance as part of a quality improvement lifecycle. Frameworks such as the Charity Governance Code or Ofqual's Conditions of recognition are all quality frameworks which can help us measure our organisation's performance.

Energise: Advance provides a number of predefined frameworks, so you can get up and running really quickly, or you can create your own custom frameworks based around your organisation's vision and values.

Frameworks can be customised to capture whichever outcomes and statements your organisation needs.



Organisational structure

Every organisation is different, both in size and structure. That's why we made Energise: Advance flexible enough to mirror how your organisation is structured.

Create organisational units, teams or geographic locations and assign them the quality frameworks that are right for them.

Core elements

Compliance

Manage your compliance against pre-configured frameworks or create your own to mirror your organisation's vision and values.

Collaborate across your whole organisation to track progress and impact.

Action planning

With features such as the ability to quickly formulate action plans, create control frameworks, and engage in collaborative activity while identifying and recording risks. Action planning provides your charity with a cost-effective solution to manage your risks and assurance requirements.

Risks

Build a risk register to meet your requirements collaboratively. It enables risks to be amended, saved and reconfigured quickly as and when needed, allowing everyone in your organisation to get involved while eliminating the headache of admin and errors.

Meetings

Meeting management enables team members to pull together all actions and risks in one central place and compile meeting attendance reports. It provides actionable steps that can be undertaken in a simple, easy-to-manage system.

Conflicts of interest

Energise: Advance allows you to track and monitor any conflicts of interest that you might have in one central place and be updated accordingly with regulations and frameworks as they change. It is considered good practice for a charity's governing document to include provisions to deal with conflict of interest situations. Each charity should be keeping a register of all these conflicts so they can be managed and mitigated.



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Where organisations responded by providing an actual figure spent per month on regulatory compliance (45%), responses ranged from £500 to upward of £12,000, with the average being £4618 per month.

Feel the Weight - February 2022
Federation of Awarding Bodies

Compliance

Energise Advance helps trustees to manage their charities' relationships with the Charity Commission, with a view to achieving their desired outcomes in a cost-effective manner.

The compliance functionality lets you and your team members view the up-to-date frameworks and regulations to ensure robust compliance. You can create your own frameworks or select from a pre-existing template. Examples include:

- Charity Commission
- CQC
- Ofsted

The screenshot displays the Energise Advance Compliance interface on a tablet. The top navigation bar includes the Energise Technology logo, user information (Neil Cullen), and a 'Show all' button. The main content area is titled 'Ofqual - General Conditions of Recognition'. On the left, a sidebar shows a tree view of the 'Ofqual's General Conditions of Recognition' categories, including A - Governance, B - The awarding organisation and Ofqual, C - Third parties, D - General requirements for regulated qualifications, E - Design and development of qualifications, F - Providing qualifications to purchasers, G - Setting and delivering the assessment, H - From marking to issuing results, and I - Appeals and certificates. The main content area displays the details for 'Ofqual's General Conditions of Recognition', including a 'Meets requirements' status, a 'Details' tab, and form fields for Outcome, Status, Next review date, Owner, Team, and Location. Below these are sections for 'Overall statement', 'Strengths', and 'Areas for Improvement'.

Actions

All actions
Centre Support
Digital Strategy
Education Strategy
HR
IT
QA
Trustees/Senior Leadership

Other (9)

#	Status	Title	Priority	Due	Site
19	In Progress	Send annual Col and self declaration to external EQAs	Medium	19/10/2022	Development
20	In Progress	Updates to 3rd party contracts to include information assurance requirements	High	19/10/2022	Development
21	In Progress	Review employment contracts	Low	21/11/2022	Development
22	In Progress	Prepare Ofqual Q3 data submission	High	22/10/2022	Development
23	In Progress	Submit Ofqual 2022 SOC	Low	19/10/2022	Development
24	In Progress	Feedback on funding change proposals	Medium	19/10/2022	Development
25	In Progress	Attend Ofqual webinar on updates to conditions of recognition	High	19/10/2022	Development
26	In Progress	Review business continuity plan	Low	19/10/2022	Development
27	In Progress	Update induction training for new EQAs	High	19/10/2022	Development

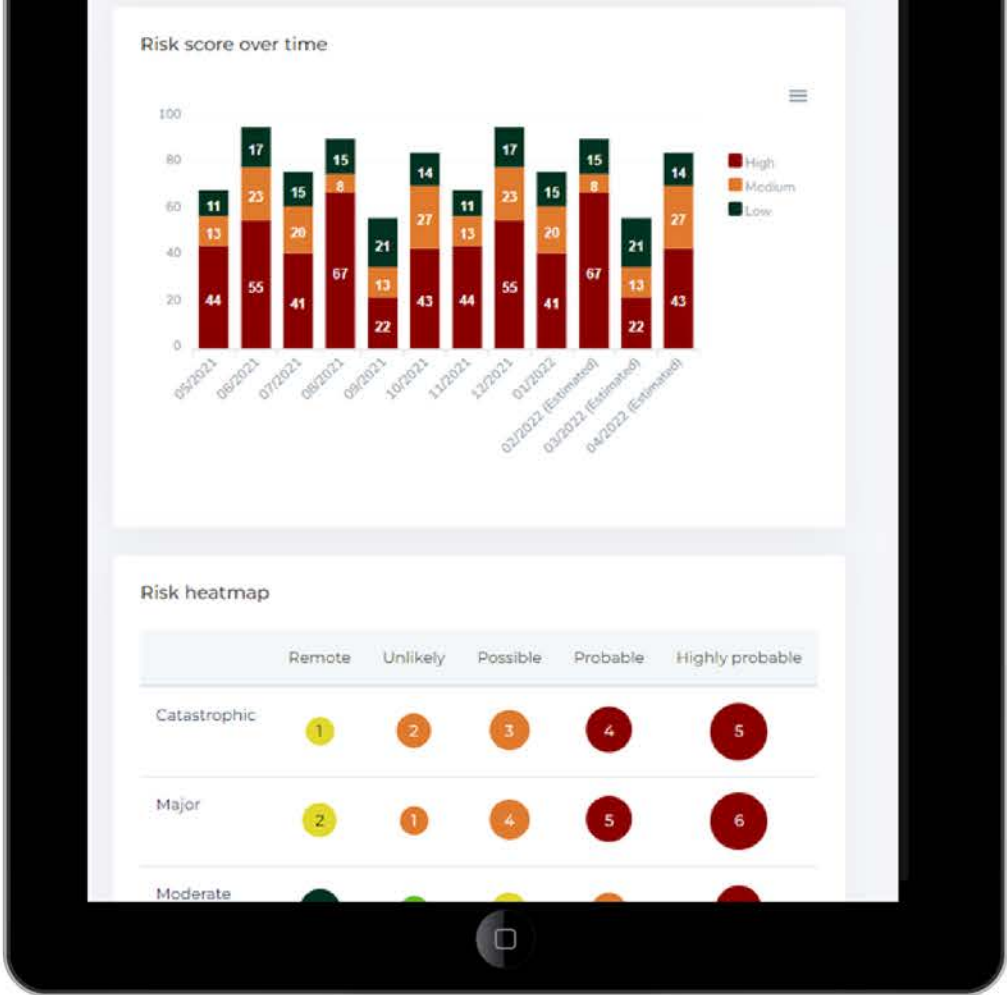
Action planning

With features such as the ability to quickly formulate action plans, create control frameworks, and engage in collaborative activity while identifying and recording risks, the Action Planning function provides your charity with a cost-effective solution to manage your risks and assurance requirements, for both small and large charities.

Risks

The risk management function allows you and your team members to build a risk register to meet your requirements collaboratively.

It enables risks to be amended, saved and reconfigured quickly as and when needed, allowing everyone in your organisation to get involved while eliminating the headache of admin and errors.



The screenshot shows the 'Risks' dashboard in the Energise Technology system. It features a table with columns for #, Status, Category, Title, Impact, and Probab... (Probability). The table lists 32 risks, each with a unique identifier, status (Open), category (Operational or Environmental), title, impact level (High, Low), and probability level (Medium, High).

#	Status	Category	Title	Impact	Probab...
1	Open	Operational	Inadequate website testing leads to customer complaints and profit loss	High	Medium
2	Open	Operational	Theft of materials, intellectual property or equipment	Low	Medium
3	Open	Operational	Project schedule is not clearly defined or understood	Low	Medium
8	Open	Operational	Acts of God for example, extreme weather leads to loss of resources, materials, premises etc.	High	Medium
30	Open	Operational	Consultant or contractor delays	Low	Medium
30	Open	Operational	Increased workload creates conflict with team goals	Low	Medium
31	Open	Operational	Estimating and/or scheduling errors	Low	Medium
32	Open	Environmental	Project design and deliverable definition is incomplete	High	High

The screenshot shows the 'Edit risk' form in the Energise Technology system. The form is titled 'Project design and deliverable definition is incomplete' and has a status of 'High' and a probability of 'High'. It includes fields for 'Next Review Date' (11/11/2022), 'Site', 'Location' (Building A), 'Team' (Thames/Senior Leadership), 'Risk Category' (Environmental), 'Root Cause Category' (Disaster recovery), 'Status' (Open), 'Impact Level' (High), and 'Probability Level' (High). There is also a 'Description' field with a rich text editor.

A scenic landscape featuring a range of mountains under a sunset sky. The sun is low on the horizon, casting a warm, golden glow over the scene. The mountains are silhouetted against the bright sky, and the foreground shows rocky terrain with some vegetation.

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Risk is an everyday part of charitable activity and managing it effectively is essential if the trustees are to achieve their key objectives and safeguard their charity's funds and assets.

Charities and risk management (CC26)
Charity Commission

December Leadership meeting

> Meetings > Edit Meeting

02/11/2022

Monthly leadership meeting to discuss finance, operations and strategy

Attendees

Neil Cullen

Attending ▾

Mark Saunders

Attending ▾

Peter Hosey

Attended ▾

Minutes/Notes

Save

13 ▾

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Documents

Upload document

Name	Uploaded	Size	Ow...	
marshwalk-sunset-bill-barber.jpg	03/11/2022	0.03 MB		
test_image.gif	03/11/2022	6.25 MB		

Meetings

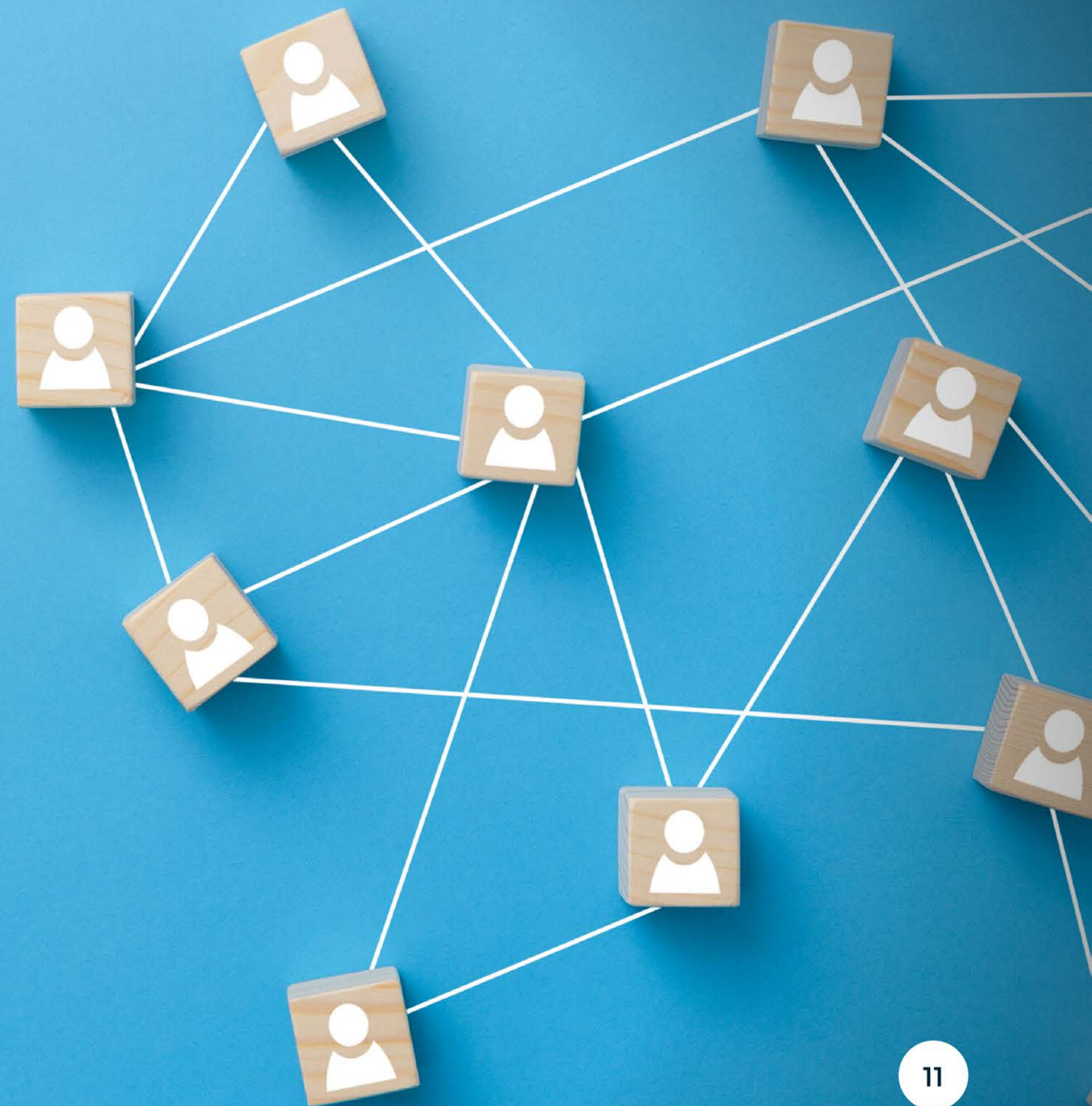
The meeting management function allows team members to pull together all actions and risks in one central place and compile meeting attendance reports.

It provides actionable steps that can be undertaken in a simple, easy-to-manage system.

Conflicts of interest

A conflict of interest is any situation in which a trustee's personal interests or loyalties could, or could be seen to, prevent the trustee from making a decision only in the best interests of the charity.

It is good practice for a charity's governing document to include provisions to deal with conflict of interest situations and a charity should be keeping a register of all these conflicts so they can be managed and mitigated. Energise: Advance allows you to track and monitor any conflicts of interest that you might have in one central place and be updated accordingly with regulations and frameworks as they change.





Providing technology solutions for charities, not-for-profits and education providers - helping them to deliver exceptional service to their users

Get in touch

www.energisetechology.co.uk
hello@energisetechology.co.uk

Book a demo

If you'd like to know more about how Energise: Advance can help your organisation manage governance and compliance in an integrated and collaborative way, we love to speak to you.

We can be contacted through email, our website or through social media channels.

www.energisetechology.co.uk
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