Good Practice in **Go For It**

A toolkit to support your project

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How to use this toolkit:

This toolkit is in four sections and we hope you'll find it useful to revisit each of them at different times as you progress in the development of your project. If you try to get them all sorted on day one then you'll probably pack up and go home!

Much of the information has been identified by existing projects, or our support workers, as key elements that should be considered in the development of your work. There are also pointers from people, as it's always easier to learn from other's mistakes if you can! Links within each section are provided to other resources and sources of help. These are not exhaustive lists by any means, but offer a place to start or to help you overcome those sticking points that occur along the way. You will also find additional website resources in **Appendix 1.** (N.B. Web addresses change frequently, but all websites in this Toolkit were correct as at 20 July 2015. If the link does not work, then the information may still be found by going to the main web page or doing a web search).

This toolkit is certainly not definitive or exhaustive. We would always encourage you to seek out the many sources of support that exist for people working in their communities. We have tried to give signposts to other resources, but look around locally: seek out local voluntary organisations in your area who might be able to offer you support; ask your Councillor what local authority workers could help you; look for partners who could bring specialist expertise; find other projects that are doing something similar - visiting them really does help fire people up and stimulate new ideas and connections. Get out and gather as many ideas as you can, and blend them with your own unique experience of your community.

Finding the right path

Research

Research, whether formal or informal, is essential, both about your community and about your intended project. The first thing to decide is what you want to know. That will determine what kind of research will help you find that out. That sounds simple, but a lot of money can be wasted finding out something you already knew or weren't interested in.

Most groups will require some support to carry out the necessary research, and costs involved will vary according to what is needed. It could be as simple as visits to projects already at work, or alternatively a complex, consultant-led process might be what is needed. Different approaches, formal and informal, can find out information such as: what the needs and resources in your community are; who else is working in this field; and whether there is a gap in provision or something additional that you can do. Research will also identify any potential partners and stakeholders.

Research should gather key statistics for the people and infrastructure that exist, highlighting points that are especially relevant to your plans. Talking to local authority services and other agencies can provide valuable information on their focus and plans. In addition, talking to potential beneficiaries, such as: local people, neighbours, nurses, doctors, teachers, youth workers, social workers, and church members, will help you find out about their thoughts and needs, which is every bit as important as the formal information.

This process will help you to be very clear about **what difference you want to make** and who for; these are your **outcomes**.

Resources:

Using 2011 Scottish Census data, the Statistics for Mission Group (**http://www.churchofscotland.org.uk/resources/stats_for_mission**) produced a file of maps and data for every Church of Scotland parish! To find the information for your parish, type your postcode into the Church Finder (**http://cos.churchofscotland.org.uk/church_finder/**), press submit, and in the further information column for your local church, click on the Parish Statistics file. You can also download: "Who is my neighbour?" (**https://www.resourcingmission.org.uk/resources/statistics-mission**) to help understand your community better.

Community Profiling: The Transformation Team, based in Glasgow, can produce a profile for your area, including statistics to help you make decisions about your work. This service may be chargeable. **www.transformationteam.org**

You'll also find useful statistical and profiling information at: **http://www.scotland.gov.uk/Topics/Statistics/SIMD and/or http://www.scotpho.org.uk**

The Community Research Toolkit is an easily read guide on to how to carry out research. Visit: **www.transformationteam.org** and follow the Resources link. The Transformation Team also provide training courses, which will develop your research skills.

Try an Internet search on "Social Return on Investment" or "Social Audit".

Visit the 'Third Sector Interfaces' section of the Voluntary Action Scotland website for details of local Interfaces in your area. Each local authority area in Scotland has an Interface, which helps support, promote, develop and represent voluntary organisations and community groups: **http://www.vascotland.org/tsis/what-is-a-tsi**

Go For It can tell you about projects we fund who might be worth a visit; have a look on our webpages (**http://www.churchofscotland.org.uk/serve/go_for_it**) or call us: 0131 225 5722. FiSCAF (Faiths in Scotland Community Action Fund) are also happy to help in this way: e-mail **info@fiscaf.org**

Points to Consider:

- Using other people's research can be a useful short cut to get up to date information. Find out if there are any reports that have recently been completed as this will save you time, energy and money!
- But remember, you generally learn more from things you find out yourself: if you need professional help, perhaps they could train you to do the research…
- **Go For It** can help you pay for research costs via our Small Grants programme. Visit: **http://www.churchofscotland.org.uk/serve/go_for_it/** and follow the Grants link.

Ownership

To get a project off the ground, it is invaluable that the people with an interest in what you are proposing are involved in the development. "Stakeholders", or any people or groups who will benefit from, influence or otherwise be connected to the work, should have been identified in the research. There can be many different people and views within this group, from cheerleaders to opponents. They will have an effect on the work you can do, so it is worth working to get them on board from an early stage. Stakeholders might include: service users or customers, churches, your local Presbytery, potential staff/volunteers, potential funders, community groups, public sector bodies or professionals related to your project. Sometimes the most unexpected people can also become valuable partners.

Find out what each group can bring to your work in the way of time, resources and expertise. Commitments may change over time with groups being more or less involved, but clear communication is priceless. One way to get a commitment to your project, especially from organisations, is to use a questionnaire to gauge their opinions and level of support. We have included some suggestions in **Appendix 2**.

Resources:

An in-depth consideration of partnerships and participation can be found on the Partnerships Online website: **http://www.partnerships.org.uk/guide/ideas.htm**

Points to Consider:

- Forming a start-up Committee/Steering Group might be a good idea at this point, to bring all of your ideas together and help decide on the way forward.
- Good communication will ensure that these new partnerships develop in a positive way, with trust.

Working out who is not going to be a partner is essential too, but think about how you could keep relations open nonetheless.

Prayer

Your church(es) will have its own traditions and habits of prayer – how can you harness these to your developing project and take the opportunity to stretch out into new ones too? Our impact is radically changed if we have an expectancy that God will work through us. Praying keeps us in that place, so it's good to be intentional about building it in, not (just) as a secret habit, but an open, inclusive and on-going process. Finding ways to build praying for the project into the congregation's existing life and worship will encourage fuller and deeper relationships, which will nourish the work over the years.

Can you build time for seeking God into the times that people meet together to develop the project? This doesn't need to be off-putting – think about who will be there and what will help them to engage. For example, if some don't believe in God or prayer, then time can still be given to silent reflection and people encouraged to share what has 'come up' for them. In this way we can begin to share our prayer life with those who don't pray, as well as benefit from their deeper reflections. It can help to give such reflection a focus, whether that is a question, an image or object: in Luke 13:34 Jesus speaks to Jerusalem and yearns to gather its people to himself, but knows their unwillingness; what is Jesus saying as he looks at your town? Prayer consequently becomes not simply a holy bit to top and tail a business agenda, but an integrated part of the work you are doing.

Resources:

The Church of Scotland Future Focus programme is a facilitator led resource that includes looking at the congregation, its links to the community and how to take forward this relationship: **http://www.resourcingmission.org.uk/resources/future-focus**

Try an Internet search on 'creative praying'.

Points to Consider:

- If you can build in the practice of prayer at the beginning of your project, you will be better placed to deal with the dilemmas and challenges that will certainly come your way.
- Engagement with the congregation can strengthen your purpose as the project progresses, and build the life of both the church and the wider community.
- Ask around to find other people who have experience in the area of prayer – if they come from a different tradition to what you're used to you can still benefit from their ideas.

Building a platform

Governance

This sets the framework and operating environment for all your work, so think it through at the beginning and keep revisiting it as your work progresses. Governance is the **strategic, legal, policy, and financial oversight** of a project, and is a collective responsibility – you will need a Committee. It is helpful to distinguish between governance and management: for example, governance is setting and reviewing strategy, management is implementing and reporting back on strategy; governance adopts and holds people accountable to policy, management prepares, implements and reports against policy.

You should have a constitution; a clear written document stating your purpose, structure, ways of working and recording procedures. There are many different structures you could use – you need to think what will help you (and your partners) make the difference you want to make most effectively. Whatever structure you adopt, you must be clear who has responsibility for governance.

For example, if the work is to be a project of a church, then you might appoint a Steering Group or Management Committee who report to the Kirk Session. In this case, the Committee may do most of the work around strategy, policy etc, but the Kirk Session will have the responsibility to watch that this is done legally and adequately. Alternatively, it may be useful to set up a new, self-governing entity (e.g. a Scottish Charitable Incorporated Organisation) to do the work, for example when there are several partners, or if the project is distinct from, or would be limited by, the core work of the parent body. The operating structure should suit your vision, objectives, and needs.

Committee members need to understand their collective responsibilities, as well as the individual roles and responsibilities of those with key positions: e.g. Chair, Treasurer, or Secretary. You should provide an information pack of what is expected of them, but remember there may be recent legislative or other changes that affect your work, so existing members need to keep up to date.

Resources:

For governance, trustees and organisational structure information, the Scottish Council for Voluntary Organisations has a range of fact sheets on a variety of topics:
http://www.scvo.org.uk/information/

For information on becoming a registered charity or a Scottish Charitable Incorporated Organisation (SCIO), the Office of the Scottish Charity Regulator offers guidance for trustees:

http://www.oscr.org.uk/managing-your-charity/trustee-duties

For a Community Toolkit, visit the following website from Dundee Voluntary Action:
http://www.d-v-a.org.uk/resources/community-toolkit/

Points to Consider:

- Choose the best governance structure according to the current requirements of your project – remember the structure can be changed later if necessary. Always check that you are complying with regulations.
- Set up a Committee with written guidelines on roles, so that everyone understands their role and how the group will operate.
- If you have a sub-Committee, ensure that they know to whom they are reporting and their boundaries.
- Take professional advice before you commit to a new form of constitutional body. It may seem costly, but might save heartache and money later on.

If there are skills gaps in your Committee, it is important identify new people who could fill them. Also bear in mind that the people who set up the project may not necessarily be the best ones to run it in the long term.

Resources

In order to operate your project, you will need resources: things, money and people. What have you got already and where will the rest come from?

What resources will you need to get once (capital) and what will you need to keep finding and using each year (revenue)? What venue(s) do you need? Will alterations be needed to the buildings? Do you need special equipment for your group? Where can you borrow it from or will you need to buy it new? What level of staffing will you require? Can your project be initially run by volunteers? What are the key pieces of work that need a member of staff?

How can you make the most of existing people and skills? Can partners help, especially at the start up stage? Someone will need to carry out basic administration and promotions, so what resources do you have for this?

What can you get without money? Can you share with others?

The answer to some of these questions will be guided by the objectives setting stage, as you balance the delivery of the project, the resources that you have, and the available finances.

Resources:

"Letting it Happen" is a useful resource for thinking through the management and use of buildings: **http://www.churchofscotland.org.uk/__data/assets/pdf_file/0017/3248/priority_handbook.pdf**

Points to Consider:

- Remember to think about how you can use what you already have.
- Sharing can get you further faster, but always keep communication clear.
- Be honest about what you need to do the job – there's no value in exaggerating or in underplaying your needs.

Finance

Start by developing a good system. Find people with skills in figures and spreadsheets, and get some help in setting up a **simple, relevant and understandable** system, that fits the size of the project and the structure of your organisation.

Once you have a clear system, you need to identify who is responsible for the various elements – the governing Committee are responsible for the whole system, but one or more individuals will need to make it work. The system needs to: keep an accurate day to day record of money coming in and going out; set budgets (see later section) and compare the actual flow of money to what was predicted; regularly report the up-to-date situation to the Committee; and present annual accounts according to the relevant legal requirements, for example for a registered charity or Company, and according to your constitution.

If your project is part of a larger organisation, some of these functions may already be provided by existing post holders, or you could request their assistance.

Resources:

The Scottish Council for Voluntary Organisations offers a guide to financial reporting: **http://www.scvo.org.uk/running-your-organisation/finance-business-management/**

For a Community Toolkit, visit the following website from Dundee Voluntary Action: **http://www.d-v-a.org.uk/resources/community-toolkit/**

Points to Consider:

- Set up a system to record money in and money out. Keep a record of separate project funds, as funders may want a breakdown of their work.
- Annual accounts will have to be prepared, externally examined and presented. If your project is part of a larger organisation, find out who you are responsible to.
- Invite someone with the necessary skills to join the Committee as Treasurer. This is especially important if your project is independent from any other organisation.
- Insurance cover and the associated costs must be checked. It may be that you are covered by existing policies, but if you create a separate entity, this may not be the case. The Church of Scotland Insurance Company can offer guidance and advice: **www.cosic.co.uk**

Employment

Taking on paid staff (part-time or full time) is a big step: it is often seen as providing all the answers to delivering a project, but it also brings new challenges. Good management practice and preparation are key to the success of the relationship. Before you start recruitment, you will need to have a job description and person specification, and a draft written statement of employment terms & conditions. Some of these can be sourced as generic templates, but remember to make them fit your situation. It is essential that you are well informed about the legal requirements of both recruitment and employment, as well as the requirements of your funders. Simply hoping for the best can be destructive for the people involved and extremely costly for the organisation; good practice makes a better project. We have included some useful information to help your recruitment planning in **Appendix 3**.

Ensure that you have thought through line management and supervision: the employee needs to know to whom they are responsible and how to get support when it is needed. It may be that external support is sought for this, or the Management Committee could undertake training to deliver this in-house. It is also good practice to have regular support and supervision meetings with your employee(s), to discuss their work.

Pension provision also needs to be considered, both under the conditions of **Go For It** grants, and under legislation now in force. You will also need to obtain Employers' Liability Insurance and register with HMRC.

Resources:

Glasgow Council for the Voluntary Sector Employers Advice Service offers information and briefing sessions on every aspect of employment. This is a subscription service, but **Go For It** will pay for the first year if you receive a Main Grant:
http://www.gcvs.org.uk/services/employers-advice/

ACAS (Advisory, Conciliation and Arbitration Service) offer information and training for employers: **http://www.acas.org.uk/index.aspx?articleid=1461**

The Dundee Voluntary Action guide also provides information on employment and people management:
http://www.d-v-a.org.uk/resources/community-toolkit/

The Pensions Service provides information about a range of issues and pension schemes:
www.thepensionservice.gov.uk

More information on pensions, including the legislation changes, can also be found at:
http://www.thepensionsregulator.gov.uk

The HMRC website is also a good source of information and advice: **http://www.hmrc.gov.uk/**

The Good Moves website is the recruitment advertising hub for the voluntary sector in Scotland. For one fee, adverts will appear on the Good Moves website, in Third Force News, and on the Scottish Council for Voluntary Organisations' website:
www.goodmoves.org.uk

The Scottish Council for Voluntary Organisations offer a payroll service, but there would be a charge for providing this: **http://www.scvo.org.uk/deal/payroll-members/**

The 'Third Sector Interfaces' section of the Voluntary Action Scotland website has details of local Interfaces in your area. Each local authority area in Scotland has an Interface, which helps support, promote, develop and represent voluntary organisations and community groups:
http://www.vascotland.org/tsis/what-is-a-tsi

Go For It can advertise project vacancies on our webpages. There is no charge for this service. Simply e-mail vacancy details to: goforit@churchofscotland.org.uk

Points to Consider:

- If you are unsure about the employment process, get advice before you start. Is there someone in your congregation or within your stakeholders who could provide employment advice free of charge?
- If you are employing someone to do a fixed term contract, ensure this is made clear from the beginning. In addition, if you don't renew an employee's fixed term contract, it counts as a dismissal, and you are legally obliged to make a redundancy payment, if the person has two or more year's continuous service.
- Set up good structures of supervision and support – this way you will keep good staff and avoid some of the issues which can come with employment.
- Ensure you follow a thorough recruitment process, including checking references and investigating membership of the Protection of Vulnerable Groups scheme.

Managing Volunteers

Different volunteers have different motivations to get involved in your project, but if their engagement is to benefit the project, it needs to fulfil their own motives too. The person co-ordinating their volunteering should therefore get to know them, understand their motivation and manage their time and input proactively.

Volunteer recruitment will take many forms, from word of mouth, advertising, beneficiaries wanting to 'give something back', to people seeking work experience. Drawing up a role description for work that is required will help you recruit the right volunteer. A volunteer agreement helps identify the responsibilities and expectations each party can have of the other, for example, support that will be given, required standards of work or behaviour, policy on out of pocket expenses.

Training for volunteers both improves the work they do for you, builds their skills and satisfaction, and affirms their value to your organisation. Similarly, events or actions that thank and appreciate your volunteers, such as a meal out or volunteer of the month awards, build up a positive, stable and effective team.

Resources:

Volunteer Scotland provide an extensive collection of information about working with volunteers, including how to support them and measure their impact:

http://www.volunteerscotland.net/

The Volunteer Scotland website also has templates for volunteer policies and recruitment: **http://www.volunteerscotland.net/organisations/resources/good-practice-guides/**

The Church of Scotland Safeguarding Service has good information and templates on recruitment of volunteers, how to check whether Protection of Vulnerable Groups scheme membership is required, and safer recruitment outlines: **http://www.churchofscotland.org.uk/about_us/safeguarding_service/safe_recruitment**

'Valuing Volunteers' is a set of guidance notes and templates for managing volunteers. To receive a copy, contact The Transformation Team: **info@faithincommunityscotland.org**

The Church of England's Churches' Urban Fund website has lots of useful information on working with volunteers: **https://www.cuf.org.uk/pages/search.aspx?idCategory=d3b6a9a0-d02c-4353-b870-e2d9ffd8066f**

Points to Consider:

- Value your core volunteers, and show this by providing support and training.
- Have a written role description and volunteer policy so that everyone is clear.
- Check to see if you require to carry out Protection of Vulnerable Groups checks, and make arrangements to register with the Central Registered Body in Scotland.
- Consider having a volunteer representative on your Management Committee.

Forming partnerships

Partnerships need to be nurtured. A good partnership is a purposeful relationship, with clearly agreed responsibilities and consistent, two-way communication. It avoids duplication, achieves the best use of resources, keeps you abreast of new developments and good practice, shares risks and workloads, and builds resilience. But partnerships involve human beings, so there can be a lack of communication, mismatched expectations and responsibilities, and drifting vision and values. It can also be confusing for users and stakeholders to understand the different organisations and their roles. In addition, a change of staff or priorities within a partner organisation can change everything.

Remember to keep the shared purpose at the centre of everything, not personal relationships. Written records are useful to ensure everyone agrees what each partner is responsible for. Personal relationships can't be the centre of your work, but they are indispensable – take time to listen and talk to each other.

Resources:

The Excellence Gateway provide an outline of the issues relating to partnerships: **http://www.excellencegateway.org.uk/content/import-msword5139**

The Community Planning Toolkit – 'Working Together' is packed full of information and advice: **http://www.communityplanningtoolkit.org/sites/default/files/WorkingTogether.pdf**

Points to Consider:

- Agree what is expected of each partner in terms of time, finance and resources. Consider having a written document of the agreed expectations.
- If someone represents an organisation in the partnership, make sure their line manager approves their commitment.
- Keep the mechanics of the partnership proportionate to the actual work you will do together – don't use a multi-lateral service agreement to crack a peanut!

Project Planning

Outcome focussed

Focussing on your outcomes, in other words the **difference you want to make** by running your project, will help to make your work successful. Try to limit yourself to three or four specific outcomes. These are the ways in which you will meet the identified need in your project. You will want to set objectives that will help you achieve your outcomes. Be SMART (Specific, Measurable, Achievable, Relevant, Time-bound) with your objectives: for example, "We will provide a weekly drop in session offering creative, interactive play for 20 parents and their children from August to June."

Try to make your objectives as straight forward as possible, as this will make evaluation and reporting easier. What is achievable will depend upon the resources you have, whether that be people, space or money, and also on your community: you can't engage 100 children if there are only 60 in your village.

The language of outcomes, outputs, objectives, milestones and targets can be confusing. Be consistent in your own thinking and be alert to how different funders use the terms, as this can vary. There is help available for this from third sector agencies, and often from funders themselves. Usually "outcomes" refers to the difference that is to be made in people's lives; "outputs" are the things you do to bring about that change; "milestones" and "targets" are often interchangeable with objectives, though their emphasis may be more on the measurable extent of progress.

These terms are common dynamics in many workplaces; people with experience of setting objectives, evaluation and reporting could well be found in your congregation or stakeholders, so ask around. See also **Appendix 4** for more information and **Appendix 5** for an action plan template.

As you develop your project, you may want to formalise your thinking and put together a business plan. This is a really useful working document to help you forward plan, but it should be exactly that – a working document - it is useless if it sits on the office shelf. We have included an outline of a business plan at **Appendix 6.**

Resources:

Go For It runs learning and training workshops, which explore outcome focused applications. Visit the website regularly for more information:
http://www.churchofscotland.org.uk/serve/go_for_it/go_for_it_learning_and_resources

Evaluation Support Scotland (ESS) also have good web resources and training courses:

http://www.evaluationsupportscotland.org.uk

In addition, the ESS website features a guide on developing a logic model, such as Weaver's triangle: **http://www.evaluationsupportscotland.org.uk/resources/127/**

The Charities Evaluation Services provide training in monitoring and evaluation and have lots of helpful resources on their website:
www.ces-vol.org.uk

Learning Link Scotland deliver regional and national events, one-to-one support and information services in connection with adult learning and the evaluation of learning, in order to support, develop and promote the work of their Members:
http://www.learninglinkscotland.org.uk/Default.aspx

Points to Consider:

- Ensure you have agreement within the project on your main outcomes.
- Get help from individuals or agencies with the relevant skills, and/or attend a training course.
- You may need to refocus your outcomes/outputs/objectives/targets for specific funders, but make sure you stay consistent in your work.
- You may have some long term outcomes as well as some short and medium term ones to work towards. Try to keep all your outcomes as relevant and concise as possible.

Evaluation

Alongside setting your objectives, you need to consider what you are going to measure, to find out whether you have achieved your objectives. There are many models available, and the one that suits your project best will depend upon what you want to evaluate, who your beneficiaries are, the way your organisation works, and the resources you have available. The choice will also depend on what your funders, partners and stakeholders want to know. Some discussion will be required at this stage to ensure that you are gathering the correct information. If you are not familiar with evaluation, then there are many sources of help which you can access.

Resources:

Evaluation Support Scotland (ESS) offer a full range of support guides on how and why to use evaluation: **http://www.evaluationsupportscotland.org.uk/resources/ess-support-guides/**

ESS also provide training courses:
http://www.evaluationsupportscotland.org.uk/how-can-we-help/workshop-and-events/

In addition, ESS offer a useful guide on identifying indicators and baseline information:
http://www.evaluationsupportscotland.org.uk/resources/128/

The Scottish Government have produced a helpful general guide to self-evaluation:
http://www.scotland.gov.uk/Publications/2007/12/12093755/1

Big Lottery Fund have produced a guide to self-evaluation for their projects:
http://www.biglotteryfund.org.uk/funding/funding-guidance/managing-your-funding/self-evaluation

The LEAP (Learning, Evaluation And Planning) framework is a useful tool for self-evaluation:
http://www.scdc.org.uk/what/LEAP/planning-evaluation-cycle/

The Charities Evaluation Service have information on PQASSO, a quality standard that organisations can work to attain, to improve their efficiency and effectiveness:
http://www.ces-vol.org.uk/PQASSO

If your project's outcomes are focused on Spiritual Growth, the following websites may be useful for evaluation:

The Church of England's Fresh Expressions website:
www.freshexpressions.org.uk

The Emerging Church section of the Mission and Discipleship Council's website:
https://www.resourcingmission.org.uk/resources/emerging-church

Mission and Discipleship's Future Focus resource, for assessing congregational health:
https://www.resourcingmission.org.uk/resources/future-focus

The Messy Church website (Emerging Church for children and families)
www.messychurch.org.uk

The Natural Church Development programme:
http://www.ncd-uk.com/

The Willow Creek Church Growth Website:
www.willowcreek.org.uk

Points to Consider:

- Remember to follow the evaluation cycle: Need, Plan, Do, Review.
- Identify what you are going to measure and what you need to record. You should also investigate different methods of measuring.
- Ensure that you are meeting the requirements of the key funders and stakeholders and that the evaluation links back to your outcomes.
- Use the results of evaluation to inform your future work.

Budgeting

A budget ensures that you have enough money to carry out your plans. It is simply a prediction for a fixed period which has two halves, income and expenditure (the money you expect to come into your organisation and the costs of delivering your project). You should prepare monthly budgets to highlight critical points, such as the end of a funding stream. If you only have figures for the year, you may hit cash-flow problems: for example, if you spend £100 a month and raise £600 at two coffee mornings in January and August, your annual figures (January to December) will look fine, but you will run out of money in July.

Expenditure should be broken down into headings that are relevant to what you will be spending; specific enough to give a clear picture of where the money goes, but without having so many headings that it becomes unmanageable.

If you are producing a budget for more than one year, an annual increase should be built in, to allow for inflation, commonly between 1-3%, as well as any particular changes you expect.

Income can be more difficult to predict at first, but be as specific and realistic as you can. Take time to develop your funding strategy, to try and develop various income streams. Be realistic, or even conservative, for estimates of money raised at fundraising events or other generated income, such as café takings. You will then be able to see the gap which is required to be filled from other funders, and you can then identify the most appropriate funders to approach.

The responsibility for agreeing the budget lies with the Committee, and it must be monitored throughout the year against actual income and expenditure, to allow timely decision making, especially if costs are exceeding the allocated amount. It is usually the Treasurer’s job to make sure the Committee, as well as relevant stakeholders, have all the necessary financial information. Next year’s budget should be prepared 3-6 months before the year begins.

Resources:

The Resource Centre website offers budgeting information for community groups, including a list of suggested headings for your financial records and budgets:
http://www.resourcecentre.org.uk/information/budgets-for-community-groups/

The Dundee Community Toolkit contains information on budgeting and cash flow:
http://www.d-v-a.org.uk/resources/community-toolkit/

Points to Consider:

- Prepare a one year budget to begin with, and then a three year budget to take account of planned development.
- Some budgets may be project specific, i.e. they cover one piece of work within your larger body of work. Project budgets should add up to, or fit within, the organisation's whole budget.
- If costs begin to exceed income, careful monitoring of the budget will alert you while you can still do something about it.

Reporting

There are various people who will want to know what you have achieved, including the people in your own organisation, your beneficiaries and partners, your funders and supporters, and, if you are a charity, the Office of the Scottish Charity Regulator.

It is very likely that you will have to write several different reports, given that each group will be interested in specific information, and prefer to receive it in a certain format. If you have monitored and evaluated your work as you go along, and kept up to date financial records, then you will have most of the information you need at your fingertips.

Funders require reports in different formats (make sure you know what is expected of you at the beginning of a grant award) but the essence is the impact of your project on your beneficiaries, and how you have delivered against the targets that you set.

Reporting is also valuable for your Committee, staff, volunteers and other supporters to be able to celebrate achievements. Don't be too busy 'doing' to notice what you are achieving! On the other side of the coin, remember to acknowledge the things that have not worked so well, and how this experience will improve your future plans. Encourage people to put their own experiences in writing – perhaps use a blog for this – and harvest quotes from your monitoring and evaluation. People's own words are powerful. Photographs and case studies can also bring a report to life.

Reporting can also include newsletters and regular updates, distributed through an e-mail list, a blog or posted on a noticeboard. Keeping people informed will keep them interested and engaged, which is essential for long term sustainability, ownership and partnerships.

Resources:

Evaluation Support Scotland have produced a variety of fun alternatives to formal evaluation and reporting: **http://www.evaluationsupportscotland.org.uk/resources/tools/**

The Social Accounting and Audit Guide is a useful resource for reporting on your project achievements. Please note there is a charge for obtaining this resource: **http://www.evaluationsupportscotland.org.uk/resources/203/**

The OSCR (Office of the Scottish Charity Regulator) website explains what they require from charities: **http://www.oscr.org.uk/managing-your-charity/monitoring-accounting**

Points to Consider:

- Identify the different reports that you have to write and get them completed on time.
- If you can produce multiple different reports at the same time, you can save work.
- Research different forms of reporting and find one that suits your project best. Music and art projects can share something visual in their reports.
- Keep letters of support, press cuttings and any testimonials safely filed for future use.

Getting the funding

Once you have gathered all the information outlined above, the funding process is about matching what you are planning to do with donors' priorities and criteria.

A Funding Strategy will include all the different methods that you are going to use to raise funds, such as grant applications, church donations, individual donors, agency contracts and fundraising activities. Most projects will identify one person who takes the lead in fundraising, and they will develop the knowledge and expertise required to carry out this important role.

Financial support through trusts and funding applications tends to dominate any strategy, but it should be weighed up against the time, effort and restrictions that this may place upon your project. Regular donors, either individuals or churches, are usually offering support for your idea, whereas a funder tends to be more interested in a specific outcome and beneficiaries. Funders sometimes give three year grants and they can form a substantial part of your required income, but it is an on-going cycle to keep finding funders. Some funders want to look for new pieces of work and others want a proven track record.

If your work breaks down into natural sections, then think about how those individual parts might appeal to different funders. A particular funder may not be interested in your Bible Club, but would like to fund the play activities you lead in the local Primary School. Or vice versa.

Resources:

Go For It runs learning and training workshops on general good fundraising practice and applying for a **Go For It** Grant in particular. Visit the website regularly for more information: **http://www.churchofscotland.org.uk/serve/go_for_it/go_for_it_learning_and_resources**

'Fit for Funding' is a one day workshop, delivered by the Transformation Team, which is designed to equip you with the skills to write effective funding applications and secure long-term sustainability for your project:
http://www.faithincommunityscotland.org/events-training/

Funding Central provides practical advice on writing better funding applications. Their article "10 Questions to ask before applying" is full of useful information, and links to a further article on writing a fundraising strategy:
www.fundingcentral.org.uk/Page.aspx?SP=6277&dm_i=3MG,34I2,8ZTLK,9S1Q,1

Big Lottery Fund have produced a guide to developing corporate funding:
https://www.biglotteryfund.org.uk/funding/funding-guidance/managing-your-funding/future-funding

Points to Consider:

- Identify what you want to do, and then find funders whose criteria you can meet, not the other way around.
- Once you have written an application, find someone who knows nothing about your project who can read it through, to make sure it clearly reflects your work and plans.
- Be realistic in your outcomes and proposed achievements, but do not undersell your value to the community/beneficiaries. Fundraising is a competition for scarce

resources – show what you can do.

To get help with grants and funders:

- Try an Internet search for your type of project.
- Ask other projects which funders have supported them.
- Look in the local library for directories.
- Ask agencies – local Interfaces, local Council staff (External Funding or Community Support); find out if there are Local Funding Surgery Days or Funder Information Days.
- Seek out local lawyers who may manage local trusts.

Policy portfolio

Firstly, you will need to identify what policies you need to do your particular work. Talk to more experienced organisations in the same line as your project, to find out what you need and if you can use theirs as specimens – very few people write a policy from scratch. You must, however, be careful to make it true to your organisation and your purposes. Once you have adopted a policy it will define how you operate, so don't set yourself up for failure by committing yourself to something that doesn't fit your project.

Keep your policies together in a safe, accessible place (they are meant to be used and referred to often) and review them regularly to ensure that you are complying with any changes in the law. The frequency of reviews should be included in the policies, and it helps to schedule reviews in a way that suits the workload of the staff and Committee responsible.

Your policy portfolio might include:

1. Constitution or operating document
2. Employee handbook, job descriptions, contracts, and terms and conditions (these should be kept in a secure place)
3. Volunteer Policy
4. Protection of Vulnerable Groups Policy
5. Health and Safety Policy
6. Lone Working Policy
7. Equal Opportunities Policy
8. Data Protection Policy

9. Environmental Policy

10. Communication or social networking policy

Resources:

SCVO provide links to Human Resources related information:
http://www.scvo.org.uk/running-your-organisation/managing-staff-volunteers/

Glasgow Council for the Voluntary Sector Employers Advice Service offers advice, information and briefing sessions on every aspect of employment. This is a subscription service, but **Go For It** will pay for the first year if you receive a Main Grant:
http://www.gcvs.org.uk/services/employers-advice/

GCVS also produces a selection of Employment Briefings, which can be downloaded from the **Go For It** webpages:
http://www.churchofscotland.org.uk/serve/go_for_it/go_for_it_learning_and_resources

The Church of Scotland Law Department produces guidance on issues relating to civil law:
http://www.churchofscotland.org.uk/resources/subjects/law_circulars

Points to Consider:

- For more specialist work, such as counselling, we recommend contacting the National Body for guidance.
- Remember that you can use existing policies from your parent body. However if you are, or become, a separate organisation, you will need to customise all of these for the new organisation.

Keeping going

Training and learning

As your project grows, then the skills of the people involved (staff, volunteers and Committee members) need to develop as well. It is important to know the skills within your group or partners, so you can utilise them and identify any significant gaps. Include questions about training in your staff supervision meetings and annual appraisals, and decide how frequently you should review the skills and training needs of the whole organisation (then put a date in the diary). Additionally, skills gaps may appear when someone leaves, or a new piece of work requires new expertise; in these situations, the best answer is often to train existing people.

Joining a network of groups that are involved in the same type of work, i.e. youth, befriending, café, might be a really useful way to learn from others.

Resources:

The National Council for Voluntary Organisations have lots of useful "How to" guides on their website, including one called "How to train and develop your workforce on a tight budget": **http://knowhownonprofit.org/how-to/how-to-train-and-develop-your-workforce-on-a-tight-budget**

The Churches Community Work Alliance Northern Ireland initiates and encourages community development work among churches:
http://www.nicva.org/organisation/churches-community-work-alliance

Faith in Community Scotland provides training, resources, advice and support to faith groups to develop their potential to make a difference in Scotland's poorest communities:
www.faithincommunityscotland.org

Forge is a leadership training and mentoring programme for those who sense that God might be leading them into creating new expressions of church:
http://www.forgescotland.com/training/invest/overview.php

Fresh Expressions provides Mission Shaped Ministry training for those interested in exploring a fresh expression of church:
http://www.freshexpressions.org.uk/training?page=2
For details of Scottish based courses, please contact David McCarthy, Church of Scotland Fresh Expressions Development Worker:
Tel. 0131 225 5722
E-mail: **dmccarthy@churchofscotland.org.uk**

The Mission and Discipleship Council organise training events and produce learning resources:
https://www.resourcingmission.org.uk/welcome

The Scottish Community Development Centre provides training and consultancy support in all aspects of community development:
www.scdc.org.uk

The Social Enterprise Academy delivers learning and development programmes in leadership, entrepreneurship and social impact measurement:
www.theacademy-ssea.org

Youthlink Scotland has a wide range of information on youth work resources and networks:
www.youthlinkscotland.org/

Generations Working Together offer information and resources, training and events for intergenerational practice:
http://generationsworkingtogether.org/about/

Reflective practice

Reflective practice is simply thinking about what you are doing as you go along. It is easy to get so caught up in the busy-ness of everyday work, the tyranny of the immediate, that we don't reflect on what is happening around us. As a consequence:

- We can miss the opportunity to enjoy good things that happen and become preoccupied with the problems we're facing.
- We miss connections between what happened here, today, and what is going on at other times or places, and we are less effective than we could be.
- We don't explore the questions arising from particular situations and so don't learn and develop, either as projects or as individual workers.

Projects are full of busy people, but reflective practice doesn't have to be a lot of work, just enough to get people thinking, not just about what happened, but about what it meant. A simple debrief after an activity helps monitoring and evaluation purposes, but remember it is not just about gathering stats for funders, but about learning and making your work as good as it can be. If this exercise can be done as a team, then the team members are also likely to become more effective, enthusiastic and committed over time.

Supervision and team meetings can be opportunities to help people engage with the underlying meanings and puzzles of the work they are doing. Supervisors and Chairpersons need to create space to explore these, to keep people learning and engaged. Not every question can be neatly answered at first, but if we keep asking them, we will learn new things.

For the bigger picture, step back from time to time as an individual, as a team or as a whole project (board, staff, volunteers, beneficiaries, friends). This might be scheduled around the natural rhythms of your year and could be in many forms: a spiritual retreat, a facilitated review, a more informal gathering. As long as it gets people thinking and talking together about what's going on for people in the project, there will be learning and growth. Think about whether there are sympathetic (and skilled) people around who could support your work by leading this kind of reflection. There might be Presbytery or national Church staff who could facilitate such a review for you, or you might have contacts in other local organisations. You can often go a long way before you have to spend money on a review facilitator, but the most important thing is to enlist the person with the right understanding and skills.

Reflecting on the environment which your project is operating in will help to identify any areas of concern, as well as external factors which may impact on your work, or gaps where you could provide a service. One way of doing the reflection more systematically is to undertake a PEST (Political, Economic, Social and Technological) analysis, which allows you to consider your work through each of the four areas. We have included some more information on PEST analysis at **Appendix 7.**

Resources:

The following groups could offer help with a review:

The Priority Areas Committee
http://www.churchofscotland.org.uk/serve/ministries_council/priority_areas/about_priority_areas

The Transformation Team
http://www.transformationteam.org/

Presbytery Staff
http://www.churchofscotland.org.uk/contact_us/presbytery_list

Mission & Discipleship Staff
https://www.resourcingmission.org.uk/resources/people

National Council for Voluntary Organisations
http://www.ncvo-vol.org.uk/

The Craighead Institute, Glasgow (there would be a charge for using their services)
http://www.craighead.org.uk/

Try an Internet search for an "Independent Consultant" in your area.

You could also try an Internet search on "Reflective Practice".

The following suggestions could help your project bring praying and reflecting together:

- Share "God moments" with workers, volunteers and beneficiaries as they happen.

- Have weekly conversations, to build up relationships with the people in your project.
- Celebrate answered prayer.
- Hold a monthly meeting between representatives of the project and the congregation.
- Circulate your project's prayer needs.
- Hold events in your local church e.g. "Project Sunday".

Expecting & celebrating success

Because you have clear objectives and are evaluating your work, you will notice when you are achieving the results that you set out to meet. It is important to enjoy the successes as you go along, as well as holding bigger celebrations. Use your annual general meeting to celebrate your work with supporters, funders, partners, and beneficiaries (or potential ones). Hold special events to showcase your work to the community, or use the opportunities provided by other community events. These events can be a good way of bringing together people that you would not normally meet.

Think about your annual report. Is it interesting, inspiring and colourful, or is it the bare minimum for legal purposes? Make friends with the local media, as they are often looking for a good local story with a photograph – this will sell papers. Be prepared with a press release and nominate one person to answer questions.

Celebrating with staff and volunteers is very important. Awards ceremonies, informal nights out and volunteer outings will assist team building and reward hard work. People working in the project will appreciate positive support and supervision meetings to encourage them; take time to recognise their contribution.

What happens when you have achieved your goals? This may mean the work is complete and you are following an exit plan. Or perhaps you need to be considering what you need to be doing/dealing with in 3 years' time? You will have come full circle and be looking at the whole planning process again, to consider the long term sustainability of your work.

Project sustainability comes from having: team and leadership building strategies; plans for on-going evaluation and development to encourage a flexible approach; networking for potential growth and support; plans for progression and succession of Committee, staff and volunteers.

Resources:

Courses on leadership and planning are usually run in your local area, or you can access external support from many agencies. Often there is a cost attached.

Points to Consider:

- Are the right people in the leadership roles, both in the staff team and on the Management Group? The "right person" will change, depending on the stage of development of your project.

- A team culture has to be built, as you identify those who have the skills to match the needs of the project. Do all team members share the same values and vision for the work?

- Problems should be solved as they occur, to avoid causing more problems in the long term. Problem solving can be especially difficult if the issue concerns people, and you might need to seek extra help.

- All areas of your project should be reviewed regularly: partnerships, buildings, staff, volunteers, Management Committee, budgets, funders etc.

- Good communication between the different stakeholders and staff/volunteers is essential. This will build trust and respect, which will allow the project to develop as necessary.

- Using assessment and evaluation will ensure that you are still delivering what the beneficiaries need and want.

And finally…

All projects start with a need. Identifying the need can be harder than you think; most of us are apt to jump to a solution based on our own experience. The saying, “nothing about us, without us, is for us” is good to keep in mind. Taking a clear look at what the actual situation is, starting to think about the need from the perspective of the people who are actually experiencing the issue, and listening to what they have to say, is crucial. From the identified need all things will flow, and you’ll plan your project around it. Remember that it does take time to get it right, and there will be lots of changes and deviations from your original plan along the way.

We hope that your experience of working with the **Go For It** Fund will be a fruitful one, and we will do our best to come alongside projects and support the great work being done!

Appendix One

Glossary of additional Websites

Web addresses change frequently, but this list was correct as at 20 July 2015. If the link does not work, then the information may still be found by going to the main web page or doing a web search.

Research

Rural Direct
http://www.scvo.org.uk/rural-direct-training-prospectus/
A national service designed to help rural community organisations. They offer information, free training and networking.

The Scottish Community Development Centre
www.scdc.org.uk/community-research/
Provides training and advice on more in-depth research tools.

Scottish Neighbourhood Statistics
www.sns.gov.uk
Provides statistics on health, education, poverty, unemployment, housing, population etc.

Prayer

Faith-Based Facilitation
http://www.salvationarmy.org/fbf
A process developed by the Salvation Army, to help people think, talk, explore and respond to their issues, in the light of faith.

Sacred Space
http://www.sacredspace.ie/
A website developed by the Irish Jesuits, which provides daily online prayers.

Governance

For information on Committee roles and responsibilities, please visit:
http://www.scvo.org.uk/running-your-organisation/trustees-boards-committees/roles-responsibilities/

For a helpful outline on Committee induction, please visit:

http://www.scvo.org.uk/running-your-organisation/trustees-boards-committees/recruiting-induction/

For a set by step guide to establishing a charity, please visit:
http://www.scvo.org.uk/setting-up-a-charity/

For an 'at a glance' guide to different structures, please visit:
https://www.gov.uk/business-legal-structures/overview

Finance

The following guide to managing cash flow is based on a business model, but contains lots of useful advice:
http://www.businesslink.gov.uk/bdotg/action/layer?r.l1=1073858790&r.s=tl&topicId=1073858944

Employment

For information on all aspects of employing people, please visit:
https://www.gov.uk/browse/employing-people

Outcome Focussed

The **Fit for Funding** course, which is run by The Transformation Team, is a good introduction to setting objectives and the application process. For information on future courses, please visit:
http://www.faithincommunityscotland.org/events-training/

Evaluation

Charities Evaluation Service
https://www.ncvo.org.uk/about-us/whos-who/charities-evaluation?highlight=WyJjaGFyaXRpZXMiLCJldmFsdWF0aW9uIiwic2VydmljZSIsImNoYXJpdGllcyBldmFsdWF0aW9uIiwiY2hhcml0aWVzIGV2YWx1YXRpb24gc2VydmljZSIsImV2YWx1YXRpb24gc2VydmljZSJd
Supports projects in making a difference and measuring outcomes.

Proving and Improving
www.proveandimprove.org/getst/index.php
Proving the impact your organisation is making is increasingly essential to maintaining a funding stream. This toolkit helps organisations to measure their impact, and the quality of

their project.

Social Return on Investment

http://www.socialvalueuk.org/resources/resources/

Offers a useful way to measure qualitative outcomes.

Reporting

The Scottish Council for Voluntary Organisations
http://www.scvo.org.uk/running-your-organisation/trustees-boards-committees/meetings/
A guide to Annual General Meetings, and information on their necessity.

Getting the funding

Directory of Social Change
https://www.dsc.org.uk/
Offers information, advice, training courses and much more. Please note that some services are chargeable.

Easy Fundraising
www.easyfundraising.org.uk/
Individuals can raise money for your project every time they make an online purchase.

Foundation Scotland
https://www.foundationscotland.org.uk/grants-and-funding-for-organisations/
Foundation Scotland manage a large number of funds which can be viewed via the above link.

Fundfinder
A subscription service which can often be accessed through your local Interface (http://www.vascotland.org/tsis/find-your-tsi).

Funding Ready Reckoner
http://www.faithincommunityscotland.org/resources/
The Transformation Team's Ready Reckoner can be used as a tool to prepare for making a funding application, and to establish which funding streams are best suited to your project.

How2fundraise.org
www.how2fundraise.org
A comprehensive, free online resource for fundraisers, created by the Institute of Fundraising. The site features a number of 'how to' guides and advice on legal issues.

Inside the mind of a Fundraiser

http://www.institute-of-fundraising.org.uk/library/inside-the-mind-of-a-grant-maker/
A publication on how Grant making works.

Jargon Buster
http://www.jargonbusters.org.uk/
Definitions for terms found in funding applications.

Just Giving
www.justgiving.com
Allows individuals to give directly to your charity.

JustTextGiving through Vodafone
www.justgiving.com/justtextgiving
Allows projects to register a mobile number, which people can text donations to. This might be useful for events or sponsored work.

Scotland's Funders Forum
http://scotlandfundersforum.org.uk/
A funders' network, which provides current information on Scottish matters.

TrustFunding
www.trustfunding.org.uk
A subscription funding website, which can be used to research funders matching your project's criteria. Although the subscription fee can seem expensive, groups of projects are encouraged to register jointly and share the cost of a multi-user licence.

Youthlink Scotland
www.youthlinkscotland.org/Index.asp?MainID=8063
A Scottish funding directory.

Policy portfolio

Volunteer Scotland Disclosure Services
http://www.volunteerscotland.net/disclosure-services
Information and advice on disclosures in the voluntary sector.

The Church of Scotland Safeguarding Service
www.churchofscotland.org.uk/about_us/safeguarding_service
Information and advice on procedures and policies for safe recruitment.

Appendix Two

Stakeholder Research Questionnaire

This questionnaire can be completed face to face or via a telephone conversation. The list below provides some starter questions, but the conversation will probably lead to others!

Organisation:

Person contacted: Role:

Telephone: Email:

Describe your project to the potential stakeholder, and explain how far you have reached in the planning stage.

Have they heard about your proposal?

What interest do they have in the proposed project?

Do they provide, or support, any similar projects?

Are there any areas they know of which require a service to be developed?

How will the project affect them – positively or negatively? If it will affect them negatively, can you overcome this?

Do they have any reservations about the proposed project?

What is their organisation's motivation in working with you?

What can they bring to the project? e.g. knowledge, reports, resources, finance etc.

Would they, or someone from their organisation, be willing to attend a Management Group meeting?

Appendix Three

Recruitment Planning

Timescale for recruitment

To work out when to begin the recruitment process, you might find it easiest to work backwards from when the appointment is to be made. Allow three weeks to prepare the documents required for advertising (see below), and allow a further three weeks for the advertisement to be seen and applications to come in. Allow one week for the shortlist to be drawn up, two weeks for the interviews to take place, one week after the interviews for the references to be received, and a further two weeks to get all the paperwork signed. Also remember that a new employee will often be required to serve at least one month's notice with their previous employer.

Documents required before you advertise

1. Job advertisement, which should include a closing date for applications.
2. Application pack, including:
    a. Job description, stating whether full/part time, job location, PVG requirement
    b. Person Specification, clearly stating which criteria are essential and desirable
    c. Job application form, stating whether or not CVs can be submitted
    d. Application Guidance notes, including details of how to submit applications
    e. Equal opportunities form
    f. Further information about the job and the organisation
3. Covering letter/email to accompany the Application Pack.

Advertising the post

1. Deciding which advertiser to use will depend on the cost and timescale. You may want to ask if the advert will be listed online, as well as in a hard copy publication.
2. Allow time for proof reading the advertisement, and check when it is published that it is correct in the hard copy and online, if applicable.
3. Create a system for recording replies to the advertisement and applications received.

Shortlisting the candidates

1. Decide who will be on the shortlisting panel. These should be the same people as those who will be on the interview panel.

2. Decide on a shortlisting process i.e. whether to meet in person, or discuss by phone/email/post. For fairness and consistency, there should be no conferring whilst each panel member draws up their shortlist. Discussion should only take place when deciding on the final list.
3. Notify the chosen candidates of the time, date and venue for the interview, and send them documents asking about their eligibility to work in UK. Enclose a travel expenses form, if you are offering reimbursement.
4. Send letters to the applicants who have not been shortlisted.

The Interviews

1. Prepare any score sheets and set questions the panel will use. These should be based on the job description and person specification.
2. Ensure that the interview panel have a full copy of each person's application, and let the panel know the timings for the day.
3. Ensure the venue fits your needs and has sufficient room and facilities for presentations etc.
4. After the interviews and discussions, offer the post, subject to references.
5. Issue a letter requesting references, and give a submission deadline. Check eligibility to work in the UK status.
6. When the preferred candidate has accepted the offer, send a letter to the candidates who were unsuccessful at interview.

All comments written in shortlisting and interview paperwork should be fair and justified. The paperwork should be kept for six months and then destroyed.

The Job Offer

1. Issue a formal job offer letter and contract with terms and conditions, for the successful candidate to sign and return.
2. Set a start date, depending on the candidate's notice requirements.
3. Prepare an induction process to help your new employee settle in.
4. Arrange pension contributions, as appropriate: (http://www.thepensionsregulator.gov.uk/). **Go For It** requires all funded projects to budget for a minimum 3% employer's pension contribution.

Appendix Four

Outcome Focussed Work

What is an outcome?

The change or difference that your project can make over time, for people (better health, more confidence, new skills, etc) and your community (environmental improvements, reduction in crime, greater participation, etc).

What are outputs?

The activities you plan to carry out and deliver each week or month (group meetings, support visits, events, etc).

What are objectives?

Objectives are the targets you set to help you achieve your outcomes. They should be measurable and achievable, so you can see your progress over time. Objectives should also have a timescale. You may not always meet your objectives, but setting them will help to prioritise your work. Objectives can be included in your Action Plan (see **Appendix 5**).

How do you set achievable objectives?

This can be difficult, but it will help if you seek the experience of others, and if you base objectives on your research, and your capacity (time, people and resources). Setting high targets may look impressive, but if they are unrealistic this will cause difficulties. If you try to deliver beyond your resources, the quality of your work may suffer, funders will lose confidence, and beneficiaries and supporters will feel let down.

What are milestones?

These are tasks that have a set date attached to them, which help to link your outputs to your outcomes. For example: Co-ordinator appointed (September), promotional information published (October), Community event held (by the end of year one).

How will you know that change has happened?

Think about how you will link your objectives to measuring your outcomes and conducting evaluation. Consider the steps that are required to reach your outcomes, and measure those. This will give you a measurement of progress as you go along. Small successes and achievements help to motivate everyone to reach for greater long term success.

Thinking about the following questions will also help you develop outcome focussed work:

- What are the needs that you want to address?
- What are the intended outcomes of your work? e.g. improved quality of life, increased confidence of people who will benefit from your project, etc.
- Who are the beneficiaries? Who are the stakeholders? These may include the volunteers in your project, as well as the wider community.
- What actions or activities are you going to undertake? In other words, what outputs are you going to action to achieve your outcomes? If it is a new project, how are you going to engage with the people that you want to meet? You might want to set targets, such as 25 people attending each week, or 10 new volunteers being recruited in a year.

Appendix Five

Action Plan Template

An Action Plan should outline the areas that the project is responsible for, and include a timescale for the actions to be completed (the target date). For your project, it might be useful to identify four main objectives (actions), and create a timescale for working through each one. The things that need to be done (the activities/outputs) can then be listed. Progress can be monitored in quarters, as in the example below, or by Committee Meeting dates, if that is more convenient.

As well as an annual work plan, the document below can also be used as a record for quarterly reporting to your team and Management Group. Remember to adapt the plan to suit your own situation and requirements.

Action Plan

Timescale for the Plan e.g. 2016 - 2017

Name of Project/Name of Person responsible for these actions

Action 1 - Create a safe place for young people to meet for weekly activities and support.

Activities*	**Target**	**Progress**			
		Quarter 1	**Quarter 2**	**Quarter 3**	**Quarter 4**
Find suitable premises. Identify equipment needed and costs. ***each action may have several main areas of activity**	Q1 Q2	View 3 suitable venues and report to Committee on (date).	Identify equipment needed and try to source it. Work out costs.		

Action 2 - Recruitment of staff and volunteers for the project.

Activities*	**Target**	**Progress**			
		Quarter 1	**Quarter 2**	**Quarter 3**	**Quarter 4**
Identify the number of staff and volunteers that are required. Write up job descriptions for all posts. Start recruitment process. ***each action may have several main areas of activity**	Q1 Q2 Q3	Visit other projects and report back to Committee on (date).	Identify the different posts; get the outlines checked over for correctness.	Advertising, selection and interviewing the candidates.	

Appendix Six

Business Plan Outline

Introduction and Executive Summary

A few paragraphs about your project, perhaps including the background to how it began.

Organisational information

For example a Project Profile, Mission Statement, Governance Information and details of the members of the Management Group/Committee/Directors. All this information will have been decided in the development stages of your project.

Management of key staff and volunteers

A short outline of the key people and how they will be line managed.

External Stakeholders and their involvement

Information on who else is involved in the project and in what ways.

Research results and any pilot work completed

Facts, figures and any other relevant information will allow the reader find out why your project is necessary and what motivates you.

PEST and SWOT analysis

A PEST (Political, Economic, Social and Technological) analysis (**see Appendix 7**) will provide the bigger picture on the environment surrounding your project. A SWOT analysis (Strengths, Weaknesses, Opportunities and Threats) will help you to identify areas of your project which are successful, as well as areas where some development is required.

Outcomes

The short and long term outcomes for your project, as well as outputs, objectives, and achievements.

Evaluation

An outline of how you are measuring the benefits of what you are doing and achieving. Some figures and achievements from previous work could be included, if you have already started your project.

Social Impact

An outline of how your project affects the local community.

Resources required

An outline of what you need (e.g. buildings, equipment, staff, volunteers, etc) and why, to develop your project. The resources required will have been identified during your research stage.

Income and Expenditure for 3 years

A breakdown of the costs and projected income, and possibly a cash-flow sheet, if you have earned income.

Key Funders

An explanation of who is funding the project and by what amount. You should also list any in kind support, such as building use or support from staff in other projects.

Key dates for review and reflection

This should be an outline of key planned events, for example, your AGM or a major review at the end of a three year plan.

Professional support

State any professional services you use, e.g. accountant, lawyer etc.

Appendix

Include any additional material you need to attach.

Policies

List the policies your project has, and how they can be obtained.

Documents

Mention how to obtain your Constitution, Annual reports and accounts, AGM minutes and OSCR recognition letter.

Research

Summarise any research which has been carried out, and mention how the full report can be obtained.

Appendix Seven

PEST Analysis

Reflecting on the environment which your project will be operating in helps to identify any areas of concern, as well as external factors which may impact on your work, or gaps where you could provide a service.

A PEST (Political, Economic, Social and Technological) analysis may sound complicated, but it will help group your findings, and allow you to present them more clearly. Using your wider group of contacts, find out what you can about the community background. You may not be able to get all the answers at first, but you will eventually increase your understanding of the bigger picture.

Below is a list of some points you could consider under each heading.

Political Factors

- Policies at local and national level e.g. tax policy
- Services the Government/Council provides (or does not provide)
- Legislation e.g. labour law, environmental law, etc.

Economic Factors

- Council funding cuts
- Inflation rates
- Lack of employment opportunities
- Decreased donations to charity due to reduced household income
- Pricing strategy of the competition (if your project has an income, e.g. a café)

Social Factors

- Family structures
- School achievement figures
- Local demographics and trends
- Isolation due to rural location, age, migration, etc
- Culture of the area

Technological Factors

- Use of the internet and social networking
- Rate of technological progress in the area
- The local community's engagement with new technology